

Executive Performance Management and Development

Habitat for Humanity

Name: Teresa BianchiDate: 05/14/2018 (OBJECTIVES)

Position: Executive Director, Habitat Buffalo

Review Period: July 1, 2017 to June 30, 2018

Part I: PERFORMANCE - Expected Results (as identified by the Executive and Board prior to evaluation period)

Objectives Specific Goals	Expected Results
	Specific, descriptive end results expected, defined in terms of quantity, quality, cost, and time
1. Performance on Budget (and Goals within the budget - Key Drivers)	
a. Development 1. Plan and Execute a Signature event. 2. Hit overall development goals in the budget	1. Signature event exceeded its budgeted goal in terms of dollars and numbers of NEW prospective donors/volunteers. 2. At the writing of this review development is slightly behind budget but is expected to receive outstanding grant money by FYE.
b. Restore 1. Hit overall Profit goals in the budget	1. Changes in the ReStore Program at the end of FY17 have yielded better than predicted results in this FY. Staff changes and improvements in operations will continue in order to realize additional increases in net profit for FY19.
c. Program Management (Construction, Families Services, and Mortgage Operations) 1. Site Selection: acquisition of planned properties (lots and rehabs) 2. Construction: 12 COO for this CALENDAR YR 2018 3. Procurement: Credit Card controls 4. Job Costing: PO Control System 5. Family Services: New policy efforts 6. Mortgage Servicing: Transition from AmeriNat to Northwest 7. Collections: establish appropriate collections process 8. Foreclosure: MAP Grants to avoid foreclosure;	1. Created a three year property acquisition plan and have exceeded goals for year one. 2. Created a three year rolling plan for acquisitions feeding the construction schedule. Original plan was based on a calendar year which we will meet the 12 COO goal. The remaining two years will be based on FY to coincide with our FY budgets. 3. Credit cards have been restricted to select personal; invoice/receipting process continues to improve (90% of invoice not turned in monthly to only 20% with a goal of 100%). 4. PO system was implemented in order to gain accurate data for job costing. Construction budgets for a new build, a typical rehab and a modular were developed and 49 Kilhoffer (broke ground in April) is the trial project for new job costing procedures. 5. House matching policy was created and operationalized yielding an expected decrease in affordability subsidies by \$300K in FY19. 6. Seamless transition from AmeriNat to NW Bank, saving over \$30K a year in servicing expenses. 7. Delinquencies remain minimal. The use of forbearance agreements to allow families that are behind to recover in a planned fashion. New PRONTOS (Payments Rendered ON Time Opportunity) have been instituted to assist families who are willing to get back on track without doing a formal loan modification. 8. Successfully reduced the number of foreclosures initiated by referring families to MAP (Mortgage Assistance Program) keeping families in their homes and minimizing risk for the affiliate.
d. Staffing (Allocation of Resources) 1. bring construction staffing in line with FY 18 plans 2. stay within funded goals	1. Reduced construction FTE count while acquisitions were at a standstill. Moved Angela back to the field as a supervisor now that production has increased, allowing us to hire a volunteer coordinator who has more development experience to assist in ramping up funding for 20 by 2020. 2. New Program Director position was not a budgeted position, however, strategic manipulation of other budget lines kept the salary budget neutral.
e. Administration <u>Data:</u> 1a. Donorlynk system to establish tracking of donors 1b. Donorlynk Roadmap needed <u>IT:</u> 2a. Roles and Responsibilities 2b. IT Planning <u>HR:</u> 3a. Transition from Alcott to ESC 3b.	1a. Development is fully engaged with DonorLink and is confident we will have accurate reporting and analyze for donors in FY19. 1b. Plan for Donorlynk: First quarter FY19 Family Services completely utilizing module. Second quarter FY19 purchase Volunteer Module (timing to coincide with the hiring of new volunteer coordinator and the UB information technology student project. FY20 purchase construction module. 2a. Transitioned IT responsibilities from John W as he retires to Matt and Stephanie. 2b. Began to identify IT partners to assist with an IT audit and security protocols. 3a. Utilizes ESC services to reduce staff work load and improve staff engagement (i.e. ESC writes and posts job descriptions for new hires; conducts new employee orientations; provide leadership development training; preparing for review an employee engagement plan for FY19) 3b.

f. Financial Controls 1. Develop a FY 2018 Budget that increases Families Served 2. Develop a FY 2019 budget that increases Families Served 3. Create appropriate dashboards to understand financial trends 4. Develop appropriate house costing methods 5. Month Pro Forma Cash Flow 6. Develop 3 year Forecast (FY 2018 to FY 2020)	1. FY18 budget was created with a reduced number of families served (10 CofO) due to the cash flow issues of the organization at the end of FY17. Successful leadership team decisions have improved the affiliates financial position allowing us to reach 12 CofOs by the end of the 2018 CY 2. Developed a FY19 budget to increase the number of CofOs to 16 3. Created department specific dashboards to report appropriate metrics. Continue to work on improving presentation and data collection procedures. 4. See construction section (1. C. #4) 5. Provides monthly Pro Forma Cash Flow to board with weekly internal reviews during peak construction season. 6. Development of a 3 year forecast (FY18 to FY20) is in process with a completion goal of May 30.
2. Managing the Organization (Staff Management and Development) - Utilize the Staffing Plan	
a. Staff Reviews and salary actions 1. Execute appropriate appraisals / reviews. 2. Plan for salary actions for FY 2019	1. Staff reviews are currently underway with an expected completion of June 30, 2018. 2. No salary adjustments were made during FY18 due to the financial status of the affiliate at the end of FY17. FY19 budget provides warranted salary adjustments as well as bonuses for staff who were instrumental in moving our mission forward in FY18.
b. Objectives and development plan for staff 1. Establish Staff mentorships	1. Established mentorships for 4 staff members. Two were successful in providing support and council but the other two need to be re-evaluated for FY19.
c. Delegation 1. Focus on construction areas being empowered 2. More leadership from Restore management 3. Signature Event Leadership delegation	1. Hiring of a Program Director allowed for delegation of construction, family services, and mortgage management oversight. 2. Moving Padraic into the role of Director of ReStore Operations allowed for delegation of ReStore oversight. 3. Recruiting a Chair of new signature event allowed for delegation of event creation and implementation. 4. Numbers 1-3 allowed ED time for coaching development manager empowering her to make independent decisions.
d. Employee Engagement, Hiring and firing, placement of resources in the organization 1. Establish Program Manager role 2. Re-evaluate the Volunteer coordinator role	1. See 2.C. Also See 1. D
3. Community Engagement (soliciting cooperation from others)	
a. Government (City of Buffalo (Primarily), Erie County, NY State) 1. Partner with COB (Strategic Planning) to secure appropriate sites and foster improved cooperation 2. Establish relationship with Land Bank (Erie County) and achieve site selection goals	1. Development of partnership with the Office of Strategic Planning for the COB led to Habitat being part of the Mayor's State of the City Address and being part of his new Homeownership Initiative 2. Successful partnership with Erie County Landbank has led to the acquisition of 2 (possibly 3) properties in FY18.
b. Foundations 1. Oshiei - utilize for governance 2. Community Foundation of Buffalo	1. Continue to utilize Karen Spaulding as a resource for Board development and governance. Also, successfully secured a three year gift for the Critical Home Repair Program. 2. Developed relationship with Cara Matteliano at the Community Foundation and was invited to be part of the Green and Healthy Homes Initiative (participation is FY19 goal). Also, successfully secured a major gift for the Critical Home Repair Program with a pledge for years 2 and 3 based on year one outcomes.
c. Donors 1. Clean Donor data 2. Major Donor Solicitation	1. See 1. E #1 2. Continued to Cultivate and successfully secured a house sponsorship for Hodgeson Russ. Secured a second sponsorship from the IUE-CWA unions.
d. Groups (Churches, Schools) 1. Sustain relationship with BOCES and McKinley High School 2. Churches 3. NGOs 4. Businesses	1. Improvements made to the Potter Rd BOCES program and discussions with two other BOCES programs. McKinley HS partnership is under review and potentially moving to an every other year project to give the students an opportunity to improve the quality of the final product. 2. Beginning discussions with Mt. Olive Church and True Bethel Community Church on ways to serve families in their congregations and partner with the community development side of their mission. 3. Strengthened partnership with PUSH Buffalo resulting in the donation of a new build lot on the West side. 4. Sustaining Bailey-Green relationship

e. Volunteers 1. Increase tracking of volunteers (DonorLink effort) 2. Execute Women's build for FY 2018	1. In an effort to engage our volunteers and identify new donors, a full-time volunteer coordinator was hired resulting in improved collection of data by better utilizing VolunteerUP online registration system for both individuals and groups; creation of a Volunteer Team to advise on engagement and safety; creation of a volunteer engagement program including a Home Team logo and T-shirt, appreciate dinner in Dec., April luncheon, semi-annual lunch n learns, Habitat Happenings Monthly E-Blast, and years of service certificate and pins. 2. Built on the success of HHB first National Women Build Week in FY17 to include a fundraising component in FY18. 3. Executed the first Building on Faith Week. 4. Successfully transitioned 3 Home Team Volunteers from the overcrowded construction site to other areas of the business. 5. Maintained engagement with displaced Home Team volunteers until build rate increased.
4. Personal Development	
a. Leadership 1. Complete the Leadership Buffalo Program	1. Completed Leadership Buffalo and continue to attend LB events and access resources and events provided by the contacts made thru LB. 2. Membership in the local chapter of the National Women's Presidents Organization. 3. Serve as a board member for the Construction Education Foundation. 4. Serve as a member of the Buffalo Construction Exchange
b. Education (NYS-HFH , HFHI) 1. Attend HFHI conference 2. Attend NYS-HFH ED Seminar and conference	1. No HFHI Global Conference in FY18 2. Attended two ED retreats, one Family Service Symposium, and one AHC training thru Habitat NYS.
c. Other	Attended one leadership training seminar and one HR training seminar through ESC.
5. Other specific objectives (generally one time objectives) OBJECTIVES FROM 3 YEAR ROLLING PLAN	
a. Communicate priorities and vision across organization	A 3 year rolling plan in alignment with HFHI was created. Routinely review with staff, board and Home Team volunteers how each area plays a part in the success of the plan.
b. Build Community Impact	Created and funded Critical Home Repair Program. Implementation to begin in FY19
c. Build Sector Impact	1. Beginning discussions with Community Development Organizations on ways Habitat can assist them in expanding their efforts in building affordable homeownership opportunities. 2. Advocacy work with Habitat NYC lead to Senator Kennedy cosponsoring a bill to raise the per-unit cap in high-cost markets from \$40,000/du to \$110,000/du to reflect changes in construction costs in recent years.
d. Building Societal Impact	1. Initiated the first meeting of local affordable housing agencies. FY19 goal is to define mission of group, establish regular meeting times, and increase number of agencies involved. 2. Creation of Volunteer Team and volunteer engagement plan (See 2. E. #1).

Performance Management and Development

Part II:
Name of Evaluator: Executive Committee
Date:
Success Factors

Success Factors are the foundation for HOW we achieve business results. These specific behaviors form the basis for on-going learning and development

Mission and Core Values	Consistently	Usually	Occasionally	Rarely
Makes strategic decisions that forward the Mission of the organization				
Integrates the Core Values of Habitat for Humanity into plans, decisions, and actions				
Comments and Elaboration on above - Give concrete examples:				
Achieves Results	Consistently	Usually	Occasionally	Rarely
Meets performance targets				
Accepts responsibility for results				
Comments and Elaboration on above - Give concrete examples:				
Functional Effectiveness	Consistently	Usually	Occasionally	Rarely
Understands all elements of Habitat for Humanity, including vision, goals, objectives, and operations				
Takes an overall business point of view and encourages all functions to work together to achieve Habitat for Humanity's objectives				
Balances the objectives of the Board, finance, marketing and operations				
Comments and Elaboration on above - Give concrete examples:				
Decisiveness/Judgment	Consistently	Usually	Occasionally	Rarely
Makes appropriate recommendations and decisions, exhibits good judgement, takes action, or makes commitments				
Makes decisions on "tough" problems (e.g. those that have the potential for unpleasant personal or organizational consequences)				
Comments and Elaboration on above - Give concrete examples:				
Vision	Consistently	Usually	Occasionally	Rarely
Has a vision of future goals, directions, and priorities of Habitat for Humanity and communicates it in such a way that others understand and are committed to achieving it				
Incorporates Habitat for Humanity's vision, goals, and objectives into performance plans and objectives				
Comments and Elaboration on above - Give concrete examples:				
Strategic Thinking and Perspective	Consistently	Usually	Occasionally	Rarely

Takes a long-term, broad view of situations when making decisions and taking actions				
Reviews issues and alternatives and selects those that will have the most significant impact on the organization in the long run				
Understands the difference between long-term strategic plans and short-term, tactical plans				
Comments and Elaboration on above - Give concrete examples:				

Managing Performance	Consistently	Usually	Occasionally	Rarely
Ensures that management, professional, and personal development goals or objectives are established for staff				
Develops skills and competencies in others through assessing strengths and capabilities, identifying development needs, providing challenging tasks and assignments, and providing other appropriate developmental opportunities				
Acts as a coach to others to enable them to meet development objectives and/or assume broader or higher responsibilities				
Decides decisively and appropriately with managers and other key personnel, making decisions that reflect sound business thinking				
Holds subordinates accountable for achieving their targets and objectives				
Makes hiring/staffing decisions that result in high quality performers who are valuable talent for Habitat for Humanity				

Comments and Elaboration on above - Give concrete examples:

Managing Change	Consistently	Usually	Occasionally	Rarely
Recognizes the need for change and adapts organizational values, objectives, strategies, structures, and operating plans in response to changing Habitat for Humanity conditions				
Revises management processes or style to lead and support the required change and achieve desired results				

Comments and Elaboration on above - Give concrete examples:

Integrity and Company Ethics	Consistently	Usually	Occasionally	Rarely
desired results while demonstrating behaviors that are consistent with the values of Habitat for Humanity and in full compliance with the law				

Comments and Elaboration on above - Give concrete examples:

Leadership	Consistently	Usually	Occasionally	Rarely
Presents oneself in a way that inspires trust, competence, and confidence				
Interacts with Stakeholders (patrons, donors, volunteers, employees, the community) in ways that enhance understanding, respect, and support for Habitat for Humanity				
Communicates in such a way that others are committed to achieving Habitat for Humanity's goals				

Comments and Elaboration on above - Give concrete examples:

Teamwork and Relationships	Consistently	Usually	Occasionally	Rarely
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Creates an environment where diverse groups feel comfortable and are encouraged to participate				
Fosters cooperation within and across groups in order to accomplish Habitat for Humanity's objectives				
Encourages open, honest, and constructive communication with stakeholders				
Comments and Elaboration on above - Give concrete examples:				
Managing Stakeholder Relationships	Consistently	Usually	Occasionally	Rarely
Focuses on, and demonstrates a commitment to stakeholders				
Develops and maintains constructive relationships with stakeholders				
Understands the impact of, and reacts appropriately to, changes in external forces				
Comments and Elaboration on above - Give concrete examples:				
Overall Evaluation	Above Acceptable	Working Towards Acceptable	Unacceptable	

Employee Comments

The employee's signature indicates that the employee has seen and participated in this appraisal.
It does not indicate agreement of the appraisal content.

Signatures and Date**Executive Director****President of the Board**