

Mission

Strengthen our community through the creation and stewardship of permanently affordable housing.

Vision

A strong community with a growing and diverse portfolio of safe, high quality, energy efficient and permanently affordable housing options.

Values

Stewardship: We value the importance of protecting public and private investments in housing, neighborhoods and individual households to ensure a sustainable and growing organization to pass on to future generations.

Empowerment: We value the importance of creating opportunities and environments that give power to neighborhood representatives, community and business leaders and lower income participant households, to govern this organization.

Diversity: We recognize the differences between people and acknowledge that these differences bring tremendous value to understanding and identifying steps towards solving complex community and social challenges.

Fairness: We value and are committed to treating everyone with dignity, respect and fairness. We value democratically decided policies and procedures, as well as the ability to exercise judgment when confronted with unique circumstances.

Innovation: We value and encourage change, creativity and a commitment to seeking improved practices. We have a firm commitment to finding better ways to create permanently affordable housing and stabilize neighborhoods.

Description of Fundraising Sources

- Direct ask
- Direct mail
- Online fundraising
- Fundraiser
- Membership fees
- Corporate sponsorships
- Company matches
- Grants
- Planned giving
- Stocks/bonds
- Investment income

Fundraising Outcomes

- Increase total revenue of the organization
- Diversify revenue sources
- Grow membership in the trust

Strategies for Growth

- Invest in capacity building
- Develop the board
- Hire professional staff/consultants
- Enhance long-term relationships to raise funds
- Seek multi-year commitments

Fundraising plan discussion points

Goals vs. Mission

\$500,000 in 3 years

Place 10 additional affordable housing units into production

1. What are our expenses? Administrative, fundraising, etc
2. Pledges, government grants, private grants, foundations, matches

Strategies for the 3 year period (things we want to do)

Develop a budget

Fundraising tree

100% board participation

Understand and develop list of who should be our donors

Increase total number of donors

Highlight donor retention rates

Average gift size

Increase donor gifts

Goals vs. Strategies

Goal: 250 donors Strategy: Organize one major fundraiser per year and one small fundraiser per quarter

Strategy: Utilize social media campaign

List all of our resources

Set up fundraising calendar

Grants

1. Develop a list of grant-fundable projects
2. Identify foundations that have overlapping priorities to partner together

3. Submit proposals to foundations

Planned Giving -Alex is researching

Direct mail – lists and costs

