

Manatee County Habitat For Humanity



SUMMARY

Mission

Manatee County Habitat for Humanity is a nondenominational Christian housing ministry that develops resources, educates and mobilizes people to work alongside families in need, rehabilitating existing homes and building sustainable, affordable homes, thereby improving the quality of life in our community.

Contact Information

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Alternate Address	4105 Cortez Rd. West Bradenton FL 34210
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Website	www.manateehabitat.org
Facebook	MCHFH
Twitter	manateehabitat

General Information

Nonprofit	Manatee County Habitat For Humanity
Supported Organization	Habitat for Humanity - Haiti
Tax Exempt Status	Public Supported Charity
Incorporation Year	1994
Awarded Community Foundation Grant	Yes
Community Foundation Conducted a Site Visit	Yes
State Charitable Solicitations Permit	Yes Jan 2018
State Registration	Yes Dec 2017

BACKGROUND & NEEDS

Impact Statement

Accomplishments

1. In the last fiscal year 2015-16, Manatee Habitat constructed five sustainable single family homes and completed one rehabilitation of a foreclosed property. Six families became first-time home buyers.
2. One of the homes built this year was Manatee Habitat's first Veteran Build home..
3. Completed the final community finishes at Hope Landing in Ellenton, an 18 home community that is Habitat's first sustainable housing community, now home to thirty children and their parents. The community has received local, state and national recognition.
4. The Home Preservation Program provided housing products and services that assisted low-income elderly, disabled and veteran homeowners with home repairs providing improved safety, security and quality of life.
5. Last year 507 volunteers donated 18,600 hours in home construction, family education, administrative support and ReStore operations. Volunteers' donated time represents more than \$400,000 of in-kind labor.

Goals

1. In 2016-17, Manatee Habitat plans to build four new homes and begin construction on another two all in the City of Bradenton; complete one major home rehabilitation in conjunction with Manatee County and other partners.
2. Complete five Home Preservation Projects for existing homeowners who cannot afford critical home repairs through traditional methods. Form strategic partnerships with residents and community organizations to advance community development.
3. Secure funding sources for the acquisition and development of property for Habitat home construction for the Habitat Homebuyer program, the Home Preservation Program and the Neighborhood Revitalization Program to expand the impact of Manatee County Habitat for Humanity on the housing issues facing Manatee County citizens.
4. Support and expand the profitable operation of the two Restore thrift stores.
5. Expand the volunteer base through outreach, training and support to achieve the goal to serve more families.

Needs Statement

Needs Statement

1. Business sponsors to partner with Manatee Habitat to build affordable housing by reinvesting their tax dollars locally. The Community Contribution Tax Credit Program allows Florida companies collecting \$25,000 or more in sales tax to receive tax incentives equal to their contribution when they partner with Habitat for Humanity for the construction of low-income housing.
Four businesses at \$70,000 each are needed. The contribution can be recouped by the business in corporate income tax credit or a sales tax refund.
2. Construction Materials for Habitat Homes or Home Preservation Projects. Gifts of \$25 - \$1,000 are critical to

the procurement of the needed materials to build, rehabilitate or repair homes. A new home require \$95,000 in materials.

3. A new truck for the two ReStores operation to make more pickups of donated items to resell to help the housing ministry. \$50,000
4. Vacant land or foreclosed property that can be developed for future Habitat home construction and rehabilitation. Gifts of land or property or donations of \$25 - \$1,000 are needed.
5. Construction equipment needed. A pallet hand truck \$375, a truck rack \$400, an additional pickup truck, \$6,000. Gifts of \$25 – \$1,000 are needed to purchase these items.

Background Statement

Manatee County Habitat for Humanity was chartered in 1994 as an affiliate of Habitat for Humanity International, the organization that pioneered a housing ministry and the vision where everyone has a decent place to live. Since then, Manatee Habitat has built 125 homes with the help of donors, families and volunteers. Manatee Habitat has completed three neighborhoods – Washington Park (12 homes) and Village of the Palms (34) homes in Palmetto, and Hope Landing, a neighborhood of 18 attached villas in Ellenton, plus numerous single lot homes throughout the county and city of Bradenton. HFH Manatee has completed major rehabilitation of six homes, and upgraded more than thirty existing homes (often in conjunction with local government agencies).

The homes are built in partnership with families who eventually own them. The homeowners invest hundreds of hours of sweat equity in their new home, and must be working, debt-free and will pay their mortgage through an interest free loan from Manatee Habitat. The homes are priced at the appraised value and their mortgage payments and grants and fundraising are used to build more homes.

Habitat for Humanity International was founded in 1976 by Millard and Linda Fuller. Today, Habitat for Humanity is a true world leader in addressing the issues of poverty housing. The concept that grew into Habitat for Humanity International was born at Koinonia Farm, a small interracial Christian community outside Americus, Georgia. Koinonia Farm was founded in 1942 by farmer and Biblical Scholar Clarence Jordan. The Fullers visited the farm in 1965 after leaving a successful business in Montgomery, Alabama to being a new life of Christian service. While there Jordan and Fuller developed the concept of “partnership housing” where those in need of adequate shelter worked side by side with volunteers to build simple, decent houses. The house would be built at no profit and interest would not be charged on the loans. Building costs would be financed by a revolving fund called the “Fund for Humanity.” The fund’s money would come from the new homeowners’ house payments, no-interest loans provided by supporters and money from fundraising activities. In 1976, Millard and Linda Fuller called together a group of supporters to discuss the future of their dream. Habitat for Humanity International was born at this meeting. Faith, hard work and direction set HFHI on its successful course which has built 600,000 homes to date.

Statement from the Board Chair

Statement from the CEO/Executive Director

Areas Served

In a specific U.S. city, cities, state(s) and/or region.

FL- Manatee

Service Categories

Primary Organization Type

Housing, Shelter

Secondary Organization Type

Housing, Shelter

Tertiary Organization Type

Community Improvement, Capacity Building

PROGRAMS

Habitat Homeownership Program

Description	Manatee Habitat works with families who seek to improve their future through homeownership but have found that obtaining an affordable conventional mortgage is just out of reach. Manatee Habitat's Homebuyer program provides the "hand up" to enable qualified candidates and offer them the opportunity to purchase a Habitat home with a zero percent interest loan. Qualified families selected to participate for the homebuyer program must have a need for housing, meet income and credit guidelines and be willing to partner with Manatee Habitat and I contribute 300-500 hours of sweat equity working on the construction of their home and the homes of their future Habitat neighbors. In addition candidate participate in homeownership and financial literacy classes and will be expected to establish an escrow savings account. When a family has met the requirements of the Homebuyer program they are eligible to obtain a 25-30 year zero percent interest loan for the purchase of a home from Manatee Habitat.
Budget	\$110,000.00
Category	Housing, General/Other Housing Development, Construction & Management
Program Linked to Organizational Strategy	Yes
Population Served	Families At-Risk Populations Other Economic Level
Short Term Success	At the conclusion of current fiscal year to have completed construction of 6 homes adding 6 new Habitat homeowners and their children to the Hope Landing Community.
Long Term Success	Complete 14 homes in Hope Landing Community in Ellenton in three years.
Program Success Monitoring	Success for Habitat families is measured in their ability to meet their monthly mortgage obligations, maintain their homes and contribute to the Hope Landing Homeowners Association.
Program Success Examples	Since 1994, Manatee Habitat has built 112 homes in Manatee County.

Neighborhood Revitalization and Home Preservation

Description	Neighborhood Revitalization brings residents, community organizations and volunteers together to improve the quality of life. Manatee Habitat recognizes to help families in need of decent, affordable housing it can help existing low income homeowners keep their homes safe and secure. To help address the problems that these residents face, Manatee Habitat has expanded its outreach with a new model for Home Preservation that offers an interest free loan at a reduced cost. Homeowners will qualify if they earn 120% or less of the Area Median Income and can qualify for a sliding scale if their income is less than 80% of AMI. There is no other program that offers low-income residents a financing option to fund a critically needed repair. The repair will be accomplished at a lower cost than a conventional repair because volunteers will perform the labor. As with the Habitat Homebuyer program, the Habitat Neighborhood Revitalization partnership agreement includes a requirement for "sweat equity" from able-bodied adults in the home. For those who cannot physically participate, substitute options exist.
Budget	\$0.00
Category	Community Development, General/Other Neighborhood Revitalization
Program Linked to Organizational Strategy	Yes
Population Served	Poor,Economically Disadvantaged,Indigent US Other Economic Level
Short Term Success	The demand for the program is increasing and Manatee Habitat is committed to help families in need of decent, affordable housing. Keeping people in their familiar home with the benefit of repairs that allow them to regain safety and security provides an improved quality of life. Lower electric bills would be an immediate outcome from window or door replacement. Reduced water bills from replacing leaky fixtures or greater accessibility from the addition of a wheelchair ramp or grab bars are all needed improvements Manatee Habitat volunteers can do under Home Preservation.
Long Term Success	Creating a new financing model for home preservation that is low cost and interest free will in time become a sustainable program that will not have to rely on grants and donations exclusively. Loan payments from previous projects will be used to fund the materials for new projects in a self-perpetuating process. There is a need to expand and enhance what Manatee Habitat has been doing in Neighborhood revitalization and home preservation and in combination with new home building, the impact can be much greater in a targeted area.

Program Success Monitoring

Neighborhood Revitalization and home preservation projects were funded through specific grants such as CRA funding which is no longer available. The demand was high for the programs the residents were glad to get their projects addressed but funding limited. Manatee Habitat staff and agency staff measured the success of these programs through community feedback and grant reports. Recently Manatee Habitat has created the new position of Neighborhood Revitalization Manager whose job will be to closely track, target and increase Neighborhood Revitalization in the areas where Manatee Habitat is working and building. The addition of a dedicated staff member in this role will benefit the residents and provide much more information on the needs of residents in a targeted community.

Program Success Examples

One project recently completed was for a senior couple who had both become semi-dependent on wheelchairs for mobility. It involved adding a wheelchair ramp for easier access to their mobile home and some safety features added inside including grab bars in the bathroom and retrofitting a doorway. They could not afford to have these modifications done and they are so glad to feel safe in their home again. Another project was for a veteran who had a serious injury and was in the hospital for a extended period of time. During that time a leaky roof caused major damage in a bedroom and the kitchen. It require a new roof and ceiling repairs inside the house. A bathroom retrofit was also needed so when he came home he did not have to step in to a bathtub. Both of these projects were done using funding from a special veteran grant and individuals donations.

MANAGEMENT

CEO/Executive Director

CEO/Executive Director	Mrs. Diana Shoemaker
CEO Term Start	Aug 2011
CEO Email	dshoemaker@manatee Habitat.org

Experience

Diana Shoemaker has over twenty years of experience in non-profit and community educational program planning and management
Diana served for three years as Manatee Habitat for Humanity's Family Services Manager prior to being promoted to the position of Executive Director.

Founding Director of Family Promise of Manatee County, Inc

Masters in Social Work, Columbia University
Association of Fundraising Professional
2014 Leadership Manatee Graduate
Chair, Manatee County Affordable Housing Advisory Committee

Former CEOs/Executive Directors

William Lloyd
Apr 2011 - Aug 2011
Ron Turner
Apr 2009 - Dec 2010

Senior Staff

Didi Hager
Family Services Manager
Karen McElroy
General Manager ReStores
Marian Siegel
Finance Manager
Amy Van Dell
Resource Development Manager
Bruce Winter
Director of Construction

Staff & Volunteer Statistics

Full Time Staff	21
Part Time Staff	3
Staff Retention Rate %	82
Professional Development	Yes

Contractors	1
Volunteers	689
Management Reports to Board	Yes
CEO/Executive Director Formal Evaluation	Yes
Senior Management Formal Evaluation	Yes
NonManagement Formal Evaluation	Yes

Collaborations

Manatee Habitat partners with local community organizations and businesses interested in addressing the needs of low income families and the development of affordable housing. Manatee Habitat works closely with over 50 construction related businesses and community organizations that provide the resources, materials and funding to enable the affiliate to achieve its mission. In addition, partnerships have been formed with Manatee County government and Neighborhood Services Department and Community Redevelopment Agencies and the City of Bradenton to support the affiliate's effort to build affordable homes, rehab existing homes and revitalize communities.

Comments

Management Comments by Organization

GOVERNANCE

Board Chair

Board Chair	Mr. Roger Arnholt
Company Affiliation	Retired
Board Term	July 2017 to July 2019
Board Chair Email	rogerarnholt@aol.com

Board Co-Chair

Board Co-Chair	Rev. Rosemary Backer
Company Affiliation	Gloria Dei Lutheran Church
Board Term	July 2017 to July 2019
Board Co-Chair Email	rwbacker@gmail.com

Board Members

Name	Affiliation	Status
Mr. Richard Amesbury	Retired, Mobil Oil Company, Navy Veteran	Voting
Mr Roger Arnholt	Retired	Voting
Rev Rosemary Backer	Gloria Dei Church	Voting
Mr. Barry Berman	Retired CPA	Voting
Mr. Gary French	JPMorgan, The China Fund, Inc.	Voting
Ms Lauren Fuller	Liberty Savings Bank	Voting
Mr Tony Griffin	Pepsico	Voting
Jill McGarry	Blalock Walters	Voting
William Padelford	Garland, Padelford & Kaklis	Voting
Timothy Polk	Urban Planning Solutions LLC	Voting
Kirsten Regal	retired	Voting
Kerry Ward	Bank of the Ozarks	Voting
Mr Charles Whitfield	Manatee Glens	Voting

Board Demographics - Ethnicity

African American/Black	3
Asian American/Pacific Islander	0
Caucasian	10
Hispanic/Latino	0
Native American/American Indian	0
Other	0 0

Board Demographics - Gender

Male	6
Female	7
Not Specified	0

Governance

Board Term Lengths	2
Board Term Limits	3
Board Orientation	Yes
Number of Full Board Meetings Annually	11
Board Meeting Attendance %	82
Board Self-Evaluation	Yes
Written Board Selection Criteria	No
Percentage of Board Making Monetary Contributions	100
Percentage of Board Making In-Kind Contributions	100
Constituency Includes Client Representation	No

Standing Committees

- Development / Fund Development / Fund Raising / Grant Writing / Major Gifts
- Finance
- Executive
- Board Governance

Comments

Governance Comments by Organization

FINANCIALS

Current Financial Info

Fiscal Year Begins	2017
Fiscal Year Ends	2018
Projected Revenue	\$3,611,615.00
Projected Expenses	\$3,610,574.00
Total Projected Revenue includes "in-kind" contributions/ donations	No
Endowment Value	\$0.00
Spending Policy	N/A
Spending Policy Percentage	0
Tax Credits	No

Capital Campaign

In a Capital Campaign	No
Campaign Goal	0

IRS Form 990s

- Form 990
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Audit/Financial Documents

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Solvency

Short Term Solvency

Fiscal Year	2016	2015	2014
Current Ratio: Current Assets/Current Liabilities	4.52	1.75	0.80

Long Term Solvency

Fiscal Year	2016	2015	2014
Long-Term Liabilities/Total Assets	16%	28%	0%

Historical Financial Review

Revenue and Expenses

Fiscal Year	2016	2015	2014
Total Revenue	\$3,117,135	\$2,665,759	\$2,235,707
Total Expenses	\$2,596,665	\$3,070,291	\$2,201,811

Revenue Sources

Fiscal Year	2016	2015	2014
Foundation and Corporation Contributions	\$0	\$0	\$0
Government Contributions	\$0	\$0	\$0
Federal	\$0	\$0	\$0
State	\$0	\$0	\$0
Local	\$0	\$0	\$0
Unspecified	\$0	\$0	\$0
Individual Contributions	\$750,086	\$545,723	\$539,094
Indirect Public Support	\$0	\$0	\$0
Earned Revenue	\$2,189,799	\$1,913,646	\$1,546,695
Investment Income, Net of Losses	\$9,455	\$4,464	\$22,547
Membership Dues	\$0	\$0	\$0
Special Events	\$25,027	\$29,832	\$1,917
Revenue In-Kind	\$0	\$0	\$0
Other	\$142,768	\$172,094	\$125,454

Expense Allocation

Fiscal Year	2016	2015	2014
Program Expense	\$2,267,688	\$2,763,630	\$1,926,189
Administration Expense	\$273,517	\$279,598	\$267,342
Fundraising Expense	\$55,460	\$27,063	\$8,280
Payments to Affiliates	\$0	\$0	\$0
Total Revenue/Total Expenses	1.20	0.87	1.02
Program Expense/Total Expenses	87%	90%	87%
Fundraising Expense/Contributed Revenue	7%	5%	2%

Assets and Liabilities

Fiscal Year	2016	2015	2014
Total Assets	\$3,191,060	\$3,163,787	\$3,483,719
Current Assets	\$877,720	\$555,425	\$883,515
Long-Term Liabilities	\$500,000	\$870,648	\$0
Current Liabilities	\$194,205	\$316,754	\$1,102,802
Total Net Assets	\$2,496,855	\$1,976,385	\$2,380,917

Top Funding Sources

Fiscal Year	2016	2015	2014
Top Funding Source & Dollar Amount	Restore gross income \$1,267,799	Restore Gross Income \$1,228,646	Restore Gross Income \$1,139,295
Second Highest Funding Source & Dollar Amount	Sales to homeowners \$922,000	Sales to Homeowners \$686,000	Contributions, gifts, grants \$539,094
Third Highest Funding Source & Dollar Amount	Contributions, gifts, grants \$750,086	Contributions, gifts, grants \$545,723	Sales to Homeowners \$407,400

Comments

Financial Comments by Organization

Financial Comments by Foundation

Foundations and corporations are included with individual contributions as they were not separated in the 990s or audits. Financial figures were taken from the 990s. Federal 990s and audited financial statements reconcile.

PLANS, POLICIES & LICENSES

Plans

Fundraising Plan	No
Communication Plan	No
Strategic Plan	No
Strategic Plan Adopted	July 2016
Years Strategic Plan Considers	3
Management Succession Plan	No
Continuity of Operations Plan	No

Policies

Organizational Policies and Procedures	Yes
Written Conflict of Interest Policy	Yes
Nondiscrimination Policy	Yes
Directors and Officers Insurance Policy	No
Whistle Blower Policy	Yes
Document Destruction Policy	Yes

Affiliations

<u>Affiliation</u>	<u>Year</u>
AFP (Association of Fundraising Professionals)	0
Manatee Chamber of Commerce	0

Government Licenses

Is your organization licensed by the Government? No

Planning & Policies Comments

Planning & Policies Comments by Organization

Planning & Policies Comments by Foundation