

# PIKES PEAK HABITAT FOR HUMANITY

## DEVELOPMENT COMMITTEE

Wednesday 8<sup>th</sup>, December 2021

Via Zoom Conference

1530 – 1630

### Join Zoom Meeting

<https://us02web.zoom.us/j/89188670307?pwd=MnB6M1VyRjJ1ei9LMEJBb0NaM1ZmZz09>

### December Development Committee Key Topic: FY21 Year in Review (YiR)

- |      |  |          |
|------|--|----------|
| 1530 | Welcome/Opening Prayer ( <b>Iain</b> )   | (3 min)  |
| 1533 | Review minutes of November 2021 meeting & <b>corrected</b> October 2021 meeting document ( <b>Iain</b> )<br>– <b>documents provided with agenda</b>  | (3 min)  |
| 1536 | FY22 Contributions: November and FY22 year to date ( <b>Iain</b> )<br>– <b>document provided with agenda</b>   | (5 min)  |
| 1541 | 2021 Year End Funding Campaign – update ( <b>Sarah</b> ) <ul style="list-style-type: none"><li>• Giving Tuesday Appeal (November 30<sup>th</sup>)<ul style="list-style-type: none"><li>○ \$8,000 plan from individuals</li><li>○ \$4,000 plan from corporate<ul style="list-style-type: none"><li>▪ Ent Credit Union has provided \$5,000 as a match/challenge gift</li></ul></li></ul></li><li>• Gingerbread Home Build (Appeal) (voting Fri. 3<sup>rd</sup> to Fri. 17<sup>th</sup>, December)<ul style="list-style-type: none"><li>○ \$42,000 plan from individuals</li><li>○ \$9,000 plan from corporate<ul style="list-style-type: none"><li>▪ Presenting Sponsor (\$2,400) ANB Bank</li><li>▪ Title Sponsor (\$1,200) Five Guys</li></ul></li></ul></li><li>• Colorado Gives Day Appeal (Tuesday 7<sup>th</sup>, December)<ul style="list-style-type: none"><li>○ \$14,000 plan from individuals</li><li>○ \$6,000 plan from corporate</li></ul></li></ul> | (15 min) |

- ANB Bank has provided \$5,100 as a match/challenge gift
- Year End Mail Appeal (**Revised**: hits mail boxes Monday 20<sup>th</sup>, December)
  - \$17,000 plan from individuals
- 12-Days of Christmas Appeal (25<sup>th</sup> December – 5<sup>th</sup> January, 2022)
  - \$4,500 plan from individuals

1556	Key Topic: FY21 YiR ( <b>Iain</b> )  <b>document provided with agenda</b>	(12 min)
1608	Dollhouse(s) silent auction overview ( <b>Emma</b> )	(7 min)
1615	Sam’s Dream Time ( <b>Iain</b> )	(5 min)
1620	Any other business/agenda items for next meeting/calendar dates ( <b>Iain</b> )	(8 min)
1628	Closing and Prayer ( <b>committee member</b> )	(2 min)

**Date of next meeting:** Wednesday 12<sup>th</sup>, January – 1530 to 1630 via Zoom

**January Development Committee Key Topic: 2021 Year End Funding Campaign Results, Analysis, and Lessons Learned (conclusions)**

## Dates for the 2021/2022 diary

### December

17<sup>th</sup> (Friday) – Dollhouse silent auction ends at 1700 – RSNE

17<sup>th</sup> (Friday) – 2021 Gingerbread Home Build voting ends 2359

24<sup>th</sup> (Friday) – 3<sup>rd</sup> January 2022 (Monday) PPHFH Business Office closed for Christmas and New Year break

25<sup>th</sup> (Saturday) – 5<sup>th</sup> January 2022 (Wednesday) 12-Days of Christmas appeal

### January

12<sup>th</sup> (Wednesday) – Development Committee

17<sup>th</sup> (Monday) – PPHFH offices and programs closed in observance of Martin Luther King Jr. Day

**Correction:** 18<sup>th</sup> (Tuesday) – 31<sup>st</sup> (Monday) 4<sup>th</sup> Veteran Home application window open

22<sup>nd</sup> (Saturday) – Joint Ground Blessing ceremony for five future homeowner families at The Ridge at Sand Creek – 1000 to 1030

**Update:** 22<sup>nd</sup> (Saturday) – Home Dedication of Brittany's family home (Thrivent Faith Build) at The Ridge at Sand Creek – 1100 to 1145

# Development Committee Minutes

November 10, 2021 1530 - 1630

Via Zoom Conference

## Committee Members

Sam Adams, Committee Chair  
Brittany Faber, Committee Member  
Peter Hilts, Board Member  
Martha Johnson, Board Member

## Staff / Guests

Iain Probert, *Director of Strategic Partnerships*, Lead Staff Advisor  
Sarah Bunch, *Donor Relations Manager*, Staff Advisor  
Emma Price, *Donor Relations Specialist*  
Laura Williams-Parrish, *Community Relations Manager*

## Excused Absences

Chuck Smith, Board Member

Karla Probert, *Executive Assistant to the ED/CEO*, Acting Secretary

## Opening

Chairman Sam Adams opened the meeting at 1536 with prayer.

## Review of Minutes

October 2021 Meeting Minutes approved with one edit, to wit:

- “Giving Tuesday Appeal
  - Ent offering matching donor gift of \$5000, thus already \$1000K over corporate goal **(This should be \$1000 over corporate goal)**”

## Introduction of PPHFH’s newly hired Donor Relations Specialist, Emma Price

- Presented by Sarah Bunch with a brief background
- Emma introduced herself
- Emma’s first day of employment at PPHFH is today, November 10<sup>th</sup>

## Review of October-specific and FY ‘to date’ – Iain Probert

- Dashboard financial overview provided before meeting and shared on screen during meeting
- Individual and corporate donations are over planned budget
- Grants underperforming as a result of timing of grant disbursements, this will self-correct over time
  - Laura Williams-Parrish provided an update about a \$100K El Pomar grant, similar to a matching grant which is aligned with the ReStore

## Planned Giving Overview presentation – Martha Johnson

- As an orientation, Martha recommends aligning the percentage of time and resources expended on donor groups with the percentage of giving produced thereby (based on 2020 data):
  - Individuals – 69%
  - Foundations – 19%
  - Bequests / Planned Giving – 9%
  - Corporations – 4%
- High-level overview of:
  - What is planned giving
  - Types of planned gifts
    - Charitable bequest
    - Charitable annuity
    - Charitable trust
  - Benefits
    - Can be large source of revenue, though long term
    - Results in prolonged donor investment in mission and stability of the organization
    - Creates generational enthusiasm (IP)
  - Challenges
    - Fiscal returns delayed
    - Not an assured return; donor can name organization in will and then remove it without notifying the organization

- Difficulty in planning, as cannot predict when and how much money will be ultimately donated
- Substantial time investment
- Can be a delicate or uncomfortable topic of discussion with some donors
- Foundations to be laid to implement planned giving program
  - Well-developed major gifts program (individual)
  - Substantial segment of donors who have given five times or more
  - Staff and resources to handle legal complexities (Sarah Bunch noted that there is a mechanism currently in place allowing handoff of interested donors to HFHI planned giving specialists)
- What can be done now?
  - Relationship building is key!
  - Develop a “legacy donor circle” over time
  - Tactfully ask donors if they are interested in a legacy gift to PPHFH
  - Have legal language already prepared for people to add to their will, being extremely specific about designating **Pikes Peak** Habitat for Humanity, including tax id number
  - Encourage donors to name PPHFH as a beneficiary on current retirement or life insurance policies
  - Acknowledge and celebrate donors who have named PPHFH in estate planning
- General notes
  - Planned giving should be promoted as an “in addition” to current giving rather than “in place of”
  - These tend to be gifts of people most loyal and passionate about the organization to whom they leave a legacy
  - Start with small goals, not necessarily a percentage of donors nor a specific dollar amount, but instead a small number donors from the “pinnacle of the donor pyramid”
  - Sarah Bunch said PPHFH currently has a check box indicating interest in planned giving (so far only one donor)

#### **2021 End of Year Funding Campaign – Sarah Bunch**

- Sarah will send a comprehensive email with details of each of the five appeals comprising the end-of-year campaign, providing recommendations and even language to use to help promote and otherwise advocate for each of the appeals
- Sarah again explained the dates, campaign types and platforms, fiscal goals, and status of each appeal. (See Agenda for fiscal details and dates.)
  - Year-End Mail Appeal
    - Last year brought in \$22,628
    - To be mailed to ~1,250 houses
  - Giving Tuesday Appeal
    - Last year raised \$10,300
  - Gingerbread Home Build
    - Last year raised >\$30K
    - Currently eight confirmed participants
    - Last year’s participants have been individually invited via email to participate again this year
    - Participants can create their own text fundraising capability (new this year)
    - Delivery of kits to participants on November 22<sup>nd</sup>
    - The “thermometer” [on the website](#) reflects the peer-to-peer fundraising amounts
  - Colorado Gives Day Appeal
    - Last year raised \$19K
    - Sarah acknowledged that Colorado Gives Day, being so close to Giving Tuesday, creates a definite “overlap” and some donor confusion. Her hope is that in the future the Community First Foundation will shift Colorado Gives Day to another month.
  - 12-Days of Christmas Appeal
    - Last year raised \$3,514

#### **Photography Show and Dollhouse(s) silent auction – Iain Probert and Laura Williams-Parrish**

- Due to unforeseen circumstances, the dollhouse(s) silent auction will be postponed by ~10 days (still to be held at ReStore Northeast)

- Laura Williams-Parrish provided an explanation of the photography event currently being held at ReStore Northeast (through November 18<sup>th</sup>):
  - Brief bio of Paul Kulik, photographer of large-scale landscapes, who has donated his works (14 framed, 90-100 unframed)
  - Proceeds will benefit 4<sup>th</sup> Veterans Build
  - Artist “Meet and Greet” will be held tomorrow, Thursday, November 11<sup>th</sup> at RSNE from 6:00 to 8:00 p.m. wherein Kulik will sign his canvases and answer questions, this also allows for extended shopping hours at ReStore
  - Price range of artworks
    - Framed \$300 - \$950
    - Unframed \$175 - \$350

#### **Sam’s Dream Time – Sam Adams**

- Iain drew attention of participants to the calendar of events included in the Agenda, specifically to the Veteran Home application window listed as December 18<sup>th</sup> through 31<sup>st</sup>, requesting help in “spreading the word”. PLEASE NOTE: the dates for the application window are **January 18<sup>th</sup> through 31<sup>st</sup>**.

#### **Final Comments**

- Sam Adams has conflict on the date of the next Development Committee meeting. He has not requested rescheduling unless others also cannot make that date.
- Emma Price will be taking meeting minutes beginning in December.

#### **Closing Prayer - Sarah Bunch**

#### **Meeting adjourned at 1645**

**Next Meeting:** Wednesday, December 8<sup>th</sup> 2021 at 3:30 p.m. viz Zoom with key topic will be FY Year in Review (the YiR data will be provided in the Agenda)

Development Committee Minutes  
October 13, 2021 1530 - 1630  
Via Zoom Conference  
Meeting minutes revised on November 10, 2021

**Committee Members**

Brittany Faber, Member  
Chuck Smith, Board Member  
Peter Hilts, Board Member

**Guests/Staff**

Iain Probert, *Director of Strategic Partnerships*, Lead Staff Advisor  
Sarah Bunch, *Donor Relations Manager*, Staff Advisor  
Karla Probert, *Executive Assistant to the ED/CEO*, Acting Secretary

**Excused Absences**

Sam Adams, Chair  
Martha Johnson, Board Member

**Opening**

Iain Probert opened the meeting at 1530 with prayer. Roll call. Karla Probert, new Executive Assistant to the ED/CEO, introduced herself. Iain offered thanks to Chuck Smith and Peter Hilts for attendance and assistance at ReStore Northeast Grand Opening.

**Review of Minutes**

Due to continuing staff vacancies across the Development team, meeting minutes for September 2021 were not produced. Karla Probert will take meeting minutes until new Donor Relations Specialist is employed and onboarded. Positive feedback by Chuck Smith and Peter Hilts on RSNE Grand Opening event, facility, and team effort.

**Review of FY 22 Contributions: September and FY 'to date' – Iain Probert**

- Dashboard financial overview provided before meeting
- September concludes first quarter of this fiscal year
- Looking good on corporate side, largely because of the Thrivent “farewell money” of \$60K
- However, the \$120K included in the budget will no longer be forthcoming, thus there is a \$60K delta to be made up

**ReStore Fundraising Update – Sarah Bunch**

- \$17K raised to date
- Whatever has not yet been donated, will be added to the 12-Days of Christmas wish list

**A Donor Bill of Rights – Iain Probert**

- Read through and explicated the “Donor Bill of Rights” (produced by the Association of Fundraising Professionals, et al), especially how it pertains to PPHFH

**2021 End of Year Funding Campaign – Sarah Bunch**

- Over the course of these five appeals, goal is to raise \$100K
- Sarah explained the dates, campaign types and platforms, and fiscal goals\* of each year-end appeal. She further made the case of the importance of creating an “emotionally evocative” narrative and ways through which to “keep donors connected to the mission” throughout a period of potential donor fatigue and distraction. \* See Agenda for fiscal goals. Sub-bullets outline some further pertinent details.

- Year-End Mail Appeal
- Giving Tuesday Appeal
  - Ent offering matching donor gift of \$5000, thus already \$1000K over corporate goal **(This should be \$1000 over corporate goal; corrected on November 10<sup>th</sup>)**
- Gingerbread Home Build
  - Goal of 35 builders in '21, compared to 19 in '20. New Faith in Action Program Manager hoping to engage upwards of 10 faith institutions
  - Discussion initiated by Chuck Smith and Peter Hiltz about need for greater engagement with local military community to support Veteran's Builds/Repairs. Peter will facilitate a meeting with D49 military liaison, Kris, and Iain
- Colorado Gives Day Appeal
  - The ability to begin scheduling donations available on November 1<sup>st</sup>
  - Hosted through the "Community First Foundation", allowing donors to select PPHFH
  - Donations will be matched by ANB Bank, but the amount has yet to be determined
- 12-Days of Christmas Appeal
  - Donations will fund operational items to support the Business Office, ReStore, and Construction
  - Development will add to the wish list a portable public address system
  - Discussion initiated by Chuck about finding other revenue streams such as gift-in-kind and possible donations of large equipment (forklift, scissor lift) and other vehicles. Some procedures and processes are already in place, others will need to be worked through Jeff directly

#### **35<sup>th</sup> Anniversary Celebration – Iain Probert**

- Overview of the event: date (October 28<sup>th</sup>), time (5:45 to 8:00 p.m.), location (The Pinery on the Hill)
- Reminder to RSVP as soon as possible, as capacity is limited

#### **Sam's Dream Time – Iain Probert**

- Iain solicited comments; none offered from the Committee participants

#### **Final Comments/Requests**

- Request by Chuck to add "Planned Giving" as the key topic for the November Development Committee meeting. This will be facilitated by Chuck and Peter
- Peter asked to include in a future meeting (in 2022) a discussion of the idea roughly sketched during the Board Retreat last month, viz. significantly upscaling the Gingerbread Build concept into a "gala"

#### **Closing Prayer - Chuck Smith**

**Meeting adjourned at 4:41 p.m.**

**Next Meeting:** Wednesday, November 10<sup>th</sup> 2021 at 3:30 p.m. viz Zoom with key topic being Planned Giving



## Current Donation Performance

FY 2021	<u>Actual</u>	<u>Budget</u>	<u>Variance</u>	<u>Var %</u>
Indiv	\$ 28,913	\$ 24,325	\$ 4,588	19%
Bequest	\$ -	\$ -	\$ -	100%
Corps	\$ 9,854	\$ 140,000	\$ (130,146)	-93%
Grants	\$ -	\$ 21,650	\$ (21,650)	-100%
Religious/ Community Gr	\$ 609	\$ 5,050	\$ (4,441)	-88%
Total	<u>\$ 39,376</u>	<u>\$ 191,025</u>	<u>\$ (151,649)</u>	<u>-79%</u>
<b>FY 2020</b>	<b>\$ 38,520</b>	<b>\$ 28,408</b>	<b>\$ 10,112</b>	<b>36%</b>
<b>FY 2019</b>	<b>\$ 34,544</b>	<b>\$ 33,450</b>	<b>\$ 1,094</b>	<b>3%</b>

## YTD Donation Performance

<u>Actual</u>	<u>Budget</u>	<u>Variance</u>	<u>Var %</u>
\$ 99,279	\$ 68,650	\$ 30,629	45%
\$ -	\$ -	\$ -	100%
\$ 110,748	\$ 151,000	\$ (40,252)	-27%
\$ 59,979	\$ 110,950	\$ (50,971)	-45.9%
\$ 10,832	\$ 16,150	\$ (5,318)	-33%
<u>\$ 280,838</u>	<u>\$ 346,750</u>	<u>\$ (65,912)</u>	<u>-19%</u>
<b>\$ 168,299</b>	<b>\$ 129,669</b>	<b>\$ 38,630</b>	<b>30%</b>
<b>\$ 130,587</b>	<b>\$ 204,850</b>	<b>\$ (74,263)</b>	<b>-36%</b>

# Transforming lives. Building community.

FY21 Year in Review

July 1, 2020-June 30, 2021



Pikes Peak  
**Habitat**  
for Humanity®

Est. 1986

# Year in Review

## Global To Local

Our work helps transform lives and communities through housing, locally in El Paso County, and globally through our tithe. Driven by our vision that everyone deserves a decent place to live, we share 10% of our unrestricted funds to support select international partner affiliates and initiatives.

### Did you know?

This border is the shape of El Paso County. We provide affordable housing solutions for the entire county!

**\$902k**  
in net profit

**16th**

store in the nation out of 931 for profitability

**recycled materials**

306 tons of metal  
119 tons of porcelain  
1,248 yards of cardboard  
184k gallons of paint

**17**

lives transformed through our Homeownership Program



**\$93,124**

reinvested into the community through Habitat homeowners' property tax payments



**100**

hours of homebuyer education completed by future homeowners

**15,648**

ReStore volunteer hours



**22,933**

donations to the ReStore  
20,756 drop offs  
2,177 pickups

**10**

homes in progress

**\$206,000**

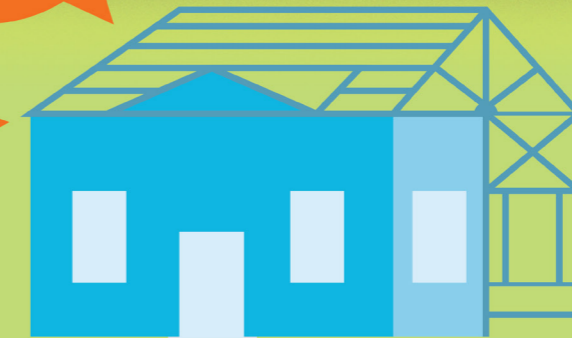
the average cost to build a PPHFH home

**home repair**

1,844 volunteer hrs  
9 homes  
\$5,333 average cost

**18,757**

construction volunteer hours



**under construction**

**\$124k**

tithe in FY21  
28 international families served

**1st**

Interfaith Build for Unity launched



**16 yrs**

of partnership with Thrivent

**1,024**

individual construction volunteers

**upcoming**

# In FY22, we will

- Dedicate the completed home of our inaugural Interfaith Build for Unity
- Further engage the faith community of El Paso County through our Faith in Action Program, enabled by our successful completion of a three-year capacity-building grant
- Launch a new three-year strategic plan – building on our mission, vision, and principles to address the urgent need for decent, affordable housing

# everyone, everywhere

No matter who we are or where we come from, we all deserve the opportunity to have a decent life. Each of us desires the opportunity for a better future, and decent shelter is something we all need to thrive. By empowering families to eliminate barriers to a better, healthier, more financially stable life, we help build successes that can impact others far beyond what we can imagine. At Pikes Peak Habitat for Humanity, this is what unites us. Working together to provide shelter, we empower. Our shared vision is a world where everyone has a decent place to live.

Thank you to our FY21 donors and volunteers whose unwavering support helped families achieve strength and stability, and empowered us to build homes, communities, and hope in the face of uncertainty.

## Our mission:

Seeking to put God's love into action, Pikes Peak Habitat for Humanity brings people together to build homes, communities and hope.



PikesPeakHabitat.org  
719.475.7800



Pikes Peak  
**Habitat**  
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**Transforming lives. Building community.**