

Neighborhood Housing Services SW AZ LeaderForce 2011

WESTSIDE STORY



PROJECT CHOSEN

P R O J E C T S

#1. Budget and Financial Overview

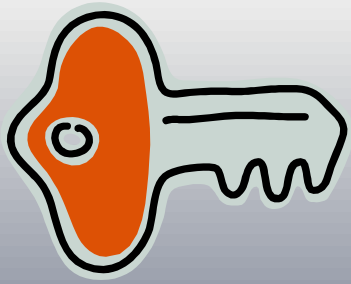
- a. Review current financials in detail for ongoing solvency
- b. Review current asset utilization
- c. Develop a 3 year financial plan, incl asset utilization

2. Board & CEO Development

3. Develop Marketing Plan & Materials

4. Identify Partners for Collaboration/Partnering/Merging





JUST WHEN YOU THINK YOU'RE ON A ROLL.....

LeaderForce Team met with the CEO, staff & Board President to develop the 3-year Financial Plan

CEO Update from National Meeting –

‘Neighbor Works’ (National Org)

- * Cutting funding to smaller NHS orgs
- * ‘Strongly’ suggested NHS- SWMC merge with NHS Phx
- * Turned down 1 of 2 grants for NHS – SWMC
- * 20% of total Funding

Additional Financial Stresses

- HUD grants have been eliminated
- Final year for foreclosure funding
- 2 outstanding loans – meeting following Monday to show loan payment plans



SHIFTING GEARS

3-year Financial Plan no longer needed

Options for NHS- SWMC

1. **Pursue Merger Opportunity with PHX - NHS**
2. Move ahead without National Support
3. Close

Developed Next Immediate Steps

1. Meet with full NHS –SW Board asap
2. Meet with Phoenix-NHS CEO/Board President
3. Full Phoenix-NHS Board to Discuss merger
4. Prepare for upcoming Bank Meeting
5. Communication Plan for Key Stakeholders





CURRENT STATUS/ NEXT STEPS



NHS – SWMC --- A. Gonzales



AZ LeaderForce Team



WEST SIDE STORY

AZ LeaderForce 2011

FEEDBACK Q&A





BACKUP





WESTSIDE STORY

AZ LeaderForce Team Members:



Coaches:
Cheval Breggins
Jason Crews
William Klever



Champions:
Heidi Schaefer and Tom Hoover





WESTSIDE STORY

NHS – SWMC

Board of Directors:



Tony Banegas - President

Jim Zimmerman– Vice President

Carmen Sanchez – Secretary



Frances Jones– Treasurer



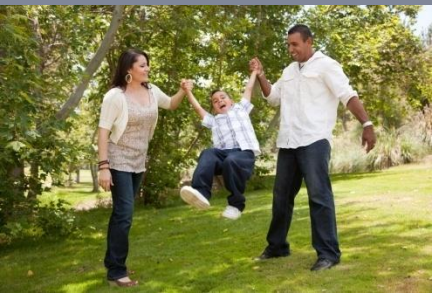
Mission Statement – NHS SWMC

To create stable and sustainable neighborhoods and businesses making a difference in the lives of people through Education, Counseling and Financial Assistance. We do this by providing programs which include, First Time Homeowners, Financial Literacy, Foreclosure Intervention, Rehab Assistance for the elderly and disabled, and down payment assistance.





Goal: NHS – SWMC



“To create stable and sustainable neighborhoods and businesses making a difference in the lives of people.”





Major Programs – NWS-SWMC

Homebuyers Education:

- First time Homeowners Program
- Financial Literacy Program



Counseling:

- Foreclosure Intervention Program



Financial Assistance:

- Rehab Program for the Elderly and Disabled
- Down payment assistance





SWOT ANALYSIS: Strengths



- Committed board
- Committed staff
- They know Community
- Solid Service Provision
- Executive Dir Leadership (17 years) – 35 years in area (contacts)
- Positive Feedback – clients
- H.U.D. certification
- Staff works across all areas within org
- Location
- Loan portfolio – zero defaults
- 1 strong tenant – Sonny (boxing)
- Own building – refinance
- 2nd building owned free & clear
- Relationship with Surprise & El Mirage
- Affiliation with National 'Neighborhood Works' training
- Funding Partners Historically
- \$100k set aside to support mortgage refinance
- Great movements to weathering recession
- Integrity of organization





SWOT ANALYSIS: Weaknesses

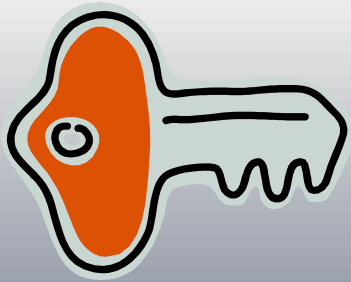


- Weight of building ownership – interest rate high (8%)
- Relationship with Avondale
- Service Area
- National Affiliations – own agendas / priorities
- Small board
- Lack of marketing / community knowledge
- Branding of P.R.
- Website (good for donors)
- Brochures
- Diminishing funds no donor base
- Sustainability – fiscal
- Org – missing in building community relations (Exec Dir & board)
- Executive Director Training – Public Speaking / Tell Story with Numbers
- Msr outcomes
- Exec Dir – succession plan missing
- No Budget
- Solvency Issues – Running through reserves
- No clear definition of board roles
- Board – Exec Dir Expectations

SWOT ANALYSIS: OPPORTUNITIES



- Add'l building –vacant
- Relationship – Avondale
- Relationship - Goodyear
- Service territory – Tolleson – Gila Bend – Wickenburg
- Board growth & develop
- Space for rent
- Resale / Thrift Store
- Build donor base
- Partnership Opportunities
- Partner with Tenant for large boxing match
- Define Board Role
- 2-tier board (Advisory & Working)
- New Programs (credit repair)
- Rummage Sale
- Farmers Market
- Community Garden (1 acre)
- Chamber of Commerce Review businesses in area
- Youthful population in western valley
- Facelift for Facility
- Tap Into Colleges for Marketing Needs
- Other non-profits (Helping Hands for single Moms)
- Asset Map
- Merger – Phx NHS, Chicanos por la Casa, City of Avondale
- West Leadership - Americorp



SWOT ANALYSIS: Threats



- Building Zoning
- Funds Declining
- Duplication of Services
 - Communities own programs
 - Phx NHS
- Size of Territory too large for staff
- Neighborhood Works (National Org) - Historical View of Issues
- Loss of Existing Board Members
- Lose Building
- Solvency





Next Steps

1. Meet with full BOD – June 22nd to share SWOT Projects
2. Choose Final Project(s)
3. Research LeaderForce Website for similar projects In past
4. Outline dates & Deliverables for Project(s)
5. Begin!

