



# A PATHWay to the Future: 2021-2023 Strategic Plan



February 8, 2021



# INTRODUCTION

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PATH was founded in Los Angeles in 1984 and since that time has pioneered bold and effective approaches to assist people experiencing homelessness. PATH operates services and housing throughout California, in three core areas to further its mission **“to end homelessness for individuals, families, and communities.”**





## PATH CORE SERVICES

### Person-Centered Supportive Services

Strategic street outreach, assertive community treatment, system navigation, employment assistance, housing placement, and housing retention

### Housing

#### Interim Housing

- Low-barrier, harm reduction, and recuperative care

#### Permanent Housing

- Site-based supportive housing, rapid re-housing, and LeaseUp

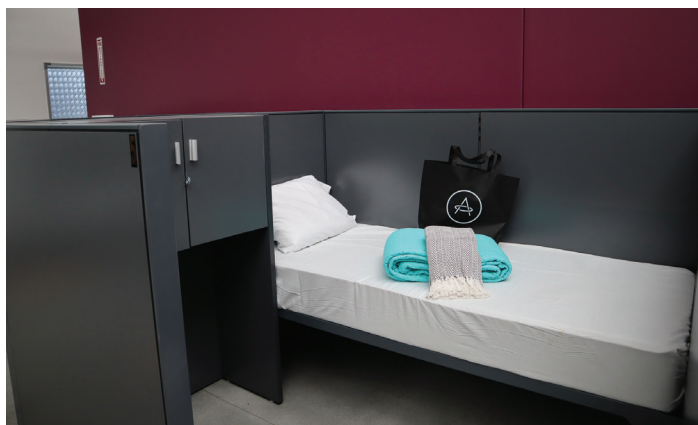
### Community Engagement

Advocacy, community mobilization, customized community solutions, and partnerships

With regional hubs in Los Angeles/Long Beach, Orange County, Sacramento County, San Diego County, San Jose/Silicon Valley, and Santa Barbara/Central Coast, PATH works in 150

cities and serves approximately 20% of people experiencing homelessness in California. PATH founded PATH Ventures in 2007 to develop high-quality, affordable, and stable homes for families and individuals experiencing homelessness, with over 1,800 housing units constructed or currently in the development pipeline.

PATH has undergone rapid growth over recent years: prior to 2015, PATH operated in just Los Angeles and San Diego counties. PATH has grown from around 300 employees in 2015 to over 900 in 2020 and from a budget of \$34 million in FY2016 to over \$141 million in FY2020 (note: these figures include PATH and PATH Ventures). While the extent of this growth exceeded expectations, the organization has been successful in meeting many goals in its 2015-20 strategic plan. Due to this rapid growth and the current uncertain health, economic, and social environment, PATH is issuing this three-year strategic plan to address key areas for the organization and provide flexibility to guide its effectiveness in working toward the mission “to end homelessness for individuals, families, and communities.”



Interim Housing



Permanent Housing



This planning process included extensive research and consultation with PATH board, staff, clients, and external stakeholders and partners. Based on this process, PATH identified key strategic imperatives and goals for the next three years, outlined in the next section.

**PATH has set the following core goals that will result over the next three years:**

**6,000** people experiencing homelessness will be permanently housed

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**1,000** new homes (including new supportive housing, as well as modular construction and motel conversions) built or renovated by PATH Ventures for people who have been homeless

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**75,000** people total receive services such as food, outreach, interim housing, and employment assistance.





# 2021-2023 STRATEGIC PLAN

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The planning process led to three **strategic imperatives** that will guide PATH’s work and development over the next three years as it works toward its mission “to end homelessness for individuals, families, and communities.” These priorities cut across all levels and aspects of the organization and represent key components necessary for PATH to achieve the core goals above and the organizational set out below.

- **Capacity** — To meet the core goals of housing and serving thousands of Californians over the next three years and given the massive growth in recent years, PATH will attend to organizational infrastructure and “right-sizing” operational support within and across regions with a strategic approach to growth.
- **Equity** — To address disparities in homelessness (e.g. about 4 in 10 people who are homeless are Black, compared to around 1 in 10 of the general population), PATH will work to advance equity and inclusion for staff and unhoused neighbors through organizational practices and policies in all levels of the organization and its work.
- **Advocacy** — Because there are structural causes to homelessness, and with PATH’s statewide reach, PATH will capitalize on its experience, data, and expertise to provide leadership on public policy and promote system change at local, state, and national levels in order to end homelessness.

## ORGANIZATIONAL GOALS

Over the next three years, PATH will work toward the following organizational goals to enable the organization to meet the core goals and its mission. Each area and goals emerged from the landscape research and planning process and include the related strategic imperatives.

## STAFFING AND HUMAN RESOURCES

With PATH's rapid and continued growth in staffing, the organization will focus over the next three years on improving policies and practices to arm and develop employees with the tools and resources to implement this strategic plan. Given how vital staff are to carrying out the mission of PATH, these goals are all prioritized to be accomplished in 2021.



### STRATEGIC IMPERATIVES: CAPACITY, EQUITY

TIMING	GOALS
Q1 2021	Communication and training for performance review process
Q2 2021	Develop policies and procedures for professional development stipend for staff
Q2 2021	Evaluate system to provide clinical supervision when required for positions
Q2 2021	Develop and launch PATH Academy leadership program <ul style="list-style-type: none"> <li>• Hire consultant to plan and implement</li> <li>• Hire staff to manage</li> </ul>
Q3 2021	Review compensation plan

## GROWTH, INFRASTRUCTURE AND OPERATIONS

Consistent with the Capacity strategic imperative, PATH will address needs at staffing, structural, and organizational levels. Analysis and planning will take place in 2021 to provide “right-sizing” and processes to guide growth that is more strategic than merely opportunistic.

### STRATEGIC IMPERATIVES: CAPACITY

TIMING	GOALS
Q1 2021	Initiate business impact analysis of positions to identify continuity, redundancy, succession, leadership structure
Q1 2021	Add infrastructure needs (e.g., full cost funding) to process when taking on new projects
Q1 2021	Analyze regional support, efficiencies, and standardization to provide recommendations

## DEI AND RACIAL JUSTICE

As part of the Equity strategic imperative, PATH will embrace diversity, equity, and inclusion (DEI) in both its internal processes and external work to end homelessness. Board and staff will begin working with a DEI consultant in 2021 to develop a plan, and PATH will hire staff to oversee the work.

### STRATEGIC IMPERATIVES: EQUITY, ADVOCACY

TIMING	GOALS
Q1 2021	Contract with DEI consultant to work with board, senior leadership, and DEI committee to clarify roles and responsibilities and develop DEI plan: <ul style="list-style-type: none"> <li>• Review HR recruiting and hiring policies to be equitable</li> <li>• Institute organization-wide diversity training program</li> <li>• Review contracting policies to ensure outreach and consideration of a diverse pool</li> <li>• Review mission and values to align with DEI goals</li> </ul>
Q3 2021	Hire staff to manage DEI





## COMMUNICATIONS

PATH will improve internal and external communications capacity by adding new staff positions in 2021. These staff will oversee the development of communications plans and strategies to ensure that the organization expands its internal capacity and influence externally.



### STRATEGIC IMPERATIVES: CAPACITY, EQUITY

TIMING	GOALS
Q1 2021	Hire staff positions in Communications to oversee internal and external communications
Q2 2021	Create internal communications plan and strategy, including: <ul style="list-style-type: none"> <li>• Assess Intranet options</li> <li>• Evaluate and fully utilize Microsoft Teams and other tools</li> <li>• Develop and clarify policies</li> <li>• Provide training</li> <li>• Improve communication channels (e.g., newsletter)</li> </ul>
Q1 2021	Create external communications plan and strategy, including: <ul style="list-style-type: none"> <li>• Branding, storytelling</li> <li>• Advocacy</li> <li>• Multimedia, social media</li> <li>• Regional and Statewide</li> <li>• Metrics</li> </ul>

## POLICY ADVOCACY AND LEADERSHIP

PATH's Advocacy strategic imperative means that it will be more proactive in working to influence public policy and systems change. Building on existing capacity, staff will engage the board of directors and other stakeholders to ensure that PATH is recognized as a leader in ending homelessness at local, regional, state, and national levels.

### STRATEGIC IMPERATIVES: ADVOCACY

TIMING	GOALS
Q1 2021	Establish Board Policy Committee to evaluate policy positions, set policy agenda, and develop mobilization strategy
Q1 2021	Explore building policy capacity (e.g., internships, fellowships, staffing, consultants)
Q3 2021	Develop advocacy resources (e.g. newsletter) and training plan for staff, board, and volunteers





## GOVERNANCE

A consultant will work with the PATH and PATH Ventures boards of directors and leadership to clarify roles and responsibilities and identify needs. Board orientation and leadership processes will be formalized and updated.

### STRATEGIC IMPERATIVES: CAPACITY

#### TIMING

#### GOALS

Q3 2021

Hire board development consultant to:

- Board assessment and development plan
- Plan to increase board diversity
- Plan for regional advisory boards
- Carry out regular Strategic Visioning

Q3 2021

Develop board orientation program that includes:

- Mentorship program for new board members
- Updated board handbook and orientation



## FINANCIAL STABILITY

PATH's operating budget has increased substantially over recent years, allowing it to serve increasing numbers of people. To ensure sustainability of this growth, PATH will raise flexible and reserve funding to ensure a future of increased impact.

### STRATEGIC IMPERATIVES: CAPACITY

#### TIMING

#### GOALS

Q1 2021

Develop strategy to increase reserve fund to \$5 million by end of 2023 (from total of \$2.5 million in 2020) to sustain necessary services through unforeseen financial delays or shortfalls

Q3 2021

Launch planned giving program and major giving programs

Q1 2022

Apply for federal indirect rate

Q4 2023

Plan for endowment/board reserve to support innovation and strategic initiatives that will increase PATH's impact

# STRATEGIC PLAN REVIEW PROCESS

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For the purpose of this process, we stressed that “plan is verb, not a noun.” To ensure that the strategic plan is a tool for action and continual reflection and improvement, PATH will engage in a regular strategic review process to hold itself accountable to its goals and imperatives and, where necessary, make corrections and adjustments.

The CEO and Deputy CEO are responsible for ensuring that the goals are integrated into department and staff work plans. PATH will track progress toward the core

and organizational goals in the [Strategic Review Dashboard](#), which will report on key indicators and contextual factors in the plan. PATH’s Compliance and Quality Assurance department will be responsible for updating the Dashboard, and updates will be provided to PATH board and staff every 6 months. PATH will issue Annual Community Updates to the broader public of supporters and partners to share progress toward goals and report on recommendations and developments regarding its work to end homelessness.

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**The Dashboard and Community Updates will be issued according to the following schedule:**

**July 2021**

Board/Staff update

**January 2022**

Board/Staff update, Annual Community update

**July 2022**

Board/Staff update

**January 2023**

Board/Staff update, Annual Community update

**July 2023**

Board/Staff update

**January 2024**

Board/Staff update, Annual Community update

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# APPENDIX

## RESULTS FROM THE 2015-2020 STRATEGIC PLAN

ORGANIZATIONAL GOAL	KEY OUTCOMES	PROGRESS	NOTES
End homelessness for as many individuals and families as possible	1) Help 10,000 people Make It Home by 2020	Achieved	Key outcome was achieved and surpassed due to increased opportunities for permanent housing.
	2) Housing retention rates of 90% or higher in all programs	Achieved all but FY 20	Key outcome was not achieved in FY20 (86%), and we are currently evaluating possible impacts and will continue to track this goal as we enter 2021.
Achieve programmatic and operational excellence	1) Achievement of contract goals at 95% efficiency	Achieved	Key outcome was achieved due to shared oversight from the program, finance and quality assurance departments.
	2) Increase staff retention rate by at least 5% per year	Not met	Key outcome was not achieved due to a lack of baseline and defined time period for calculation purposes being established for the retention goal at the time it was set. Additionally, with the rapid growth experienced, it was difficult to maintain the retention calculation as new hires were being added frequently and consistently.
	3) Increase average client satisfaction scores by at least 5% per year	Not met (but has stayed very high)	a baseline for measurement; however, the client engagement survey has consistently showed over 90% satisfaction with services.
	4) Increased operational efficiencies as measured by staff time surveys by at least 5% per year	Staff Time surveys only done in some departments	Key outcome was not achieved due to a lack of baseline for measurement of operational efficiencies. Additionally, the staff time surveys were not universally utilized by all staff and were predominantly used as part of program tracking.
	5) 100% of program staff trained in two emerging and evidence based practices within 6 months of employment	Achieved	Key milestone was achieved due to adding in a staff position as a training coordinator and an electronic training management system for all staff (Relias).
Secure financial stability and long-term sustainability	1) Increase reserve fund to cover at least 6 months of expenses, or 20% per year	Not met	Key milestone was not achieved and in retrospect was not realistic based on our growth over the past 5 years. In order to be realistic, the reserve need would be identified without passthrough funds and direct line staff as tied to contracts. For this 2021 - 2023 plan we will set a baseline and annual goals to ensure we build a strategic reserve.
	2) Increased private giving by at least 20% annually	Not met	Key milestone was not achieved. For this plan we will identify clear plans to increase private giving through planned giving, major gifts and increasing benchmarks for our annual campaigns.
	3) Diversification of funding so that any single funding source does not represent more than 20% of agency budget	Achieved	Key milestone was achieved due to the expansive growth in San Diego and San Jose regions as well as the expansion to Sacramento and Orange County to diversify funding sources.

## STRATEGIC PLANNING PROCESS

### LEADERSHIP AND STRUCTURE

PATH engaged Bill Pitkin as a consultant to design and lead the strategic planning process from July 2020 - January 2021. He worked closely with the Core Planning Team - Jennifer Hark Dietz, Deputy CEO; Sarah Kolish, CAO; and Tara Pak, Senior Director of Strategic Partnerships - to lead the project. The Team formed the Strategic Planning Committee, which represented a diverse group of staff from across the organization and met monthly to provide input into the research and planning process. Staff who participated in the committee at some time during the process include:

NAME	TITLE	REGION/OFFICE
<b>Nancy Behm</b>	Program Manager, Whole Person Wellness	San Diego
<b>La Keishia Childers</b>	Senior Director of Compliance and QA	Statewide
<b>Chuck Flacks</b>	Director of Programs	Santa Barbara
<b>Richardo Garcia</b>	Case Manager, SSVF	Los Angeles
<b>Miriam Giron</b>	Team Lead, Client Financial Assistance	Finance - Statewide
<b>Serge Liavois</b>	Associate Director, Outreach	San Jose
<b>Kolesta Moore</b>	Case Manager, Supportive Housing	Los Angeles
<b>Rebecca Samaha</b>	Case Manager, SSVF	San Diego
<b>Zach Schlagel</b>	Senior Director of Public Policy & Advocacy	Statewide
<b>Lois Starr</b>	ED of PATH Ventures	PV
<b>Sigrid Struben</b>	Kitchen & Volunteer Coordinator	San Diego
<b>Tescia Uribe</b>	CPO	Los Angeles + Orange County

In addition, Joel Roberts, PATH and PATH Ventures CEO, and the PATH and PATH Ventures boards of directors were consulted regularly during the process to provide input and feedback



## RESEARCH AND PLANNING PROCESS AND FINDINGS

The process included landscape research to better understand stakeholder perceptions of PATH and key challenges and opportunities for the organization over the next several years. Data were collected by the following means:

- *A stakeholder survey, completed by approximately 550 staff, board members, volunteers, and external partners.*
- *In-depth interviews with 10 with key external partners around the state*
- *Focus group meetings with PATH and PATH Ventures boards of directors*
- *Focus Group with staff DEI (Diversity, Equity, and Inclusion) Committee*
- *Focus group with 10 clients and in-depth interviews with 8 clients*

The results of the landscape research are [\[available here\]](#) and informed the issues and focus areas for the planning process and goal setting. Work by the Core Planning Team and the Strategic Planning Committee was informed by a series of consultations in the planning phase.

- *All staff presentation of landscape findings*
- *Six focus group meetings with approximately 75 staff from across the organization*
- *Meetings with PATH and PATH Ventures boards of directors*

