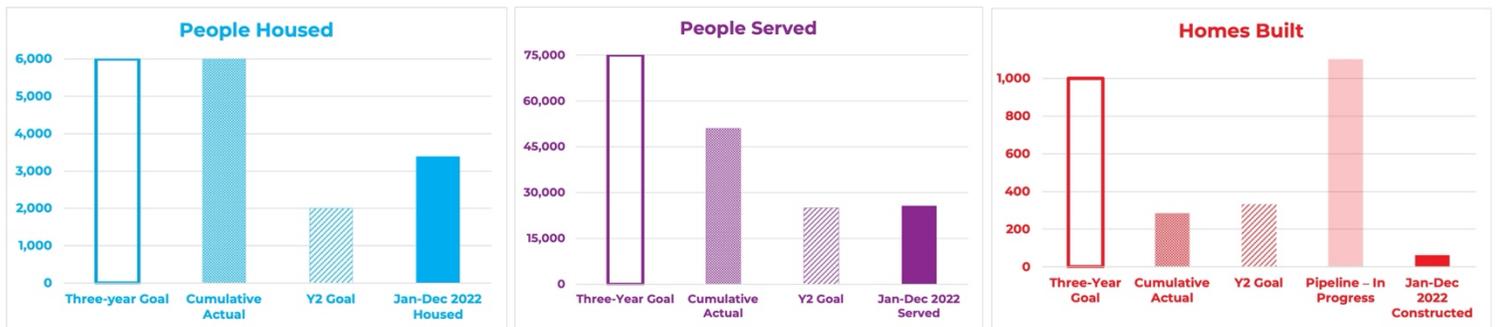


## 2021-2023 Strategic Plan Progress Report A PATHWay to the Future • Second Annual Update January-December 2022

Closing out the second year (Y2) of our strategic plan, PATH and PATH Ventures (PV) have made significant headway toward our core goals and strategic imperatives. We have started seeing the impact of our plans to increase capacity and strengthen infrastructure—as evidenced by our tremendous progress below. A key factor of our success, A PATHWay to the Future has remained active, nimble, and effective in ensuring our agencies help thousands of unhoused individuals make it home. PATH and PV know that we must sustain this momentum long-term, and we are eager to leverage our learned lessons in 2023, our plan’s final year, to further advance housing equity for our neighbors experiencing or at risk of homelessness across California.

### Progress Toward Core Goals

In Y2, we helped **1) 3,378 of our unhoused neighbors move into permanent homes—exceeding our goal by 237 percent**—and provided **2) 25,614\* individuals with critical services** such as street outreach; case management; housing navigation; employment services; and linkages to medical and mental healthcare, substance use treatment, and more. Moreover, PV maximized increased development opportunities and **3) built a growing pipeline of 1,312 units, having constructed 285 rental homes in the past year.**



*\*Data point estimates clients served during the reporting period with a degree of duplication due to the nature of funder databases. We understand individuals will progress at their own pace and anticipate existing clients to roll over into each reporting year.*

### Progress Toward Strategic Imperatives

#### Capacity

- In PATH and PV’s efforts to assess and invest in our capacity, we saw the need to examine growth opportunities more selectively and ensure strategic alignment. Our rapid expansion in the past decade was the product of PATH’s eagerness to serve the community. In Y2, we learned that the best way we can provide our unhoused neighbors with the highest quality of care is to ensure PATH and PV’s infrastructure can adequately support growth.

#### Equity

- We continued uplifting diversity, equity, and inclusion (DEI) as critical agency values. PATH and PV have been operationalizing our learned lessons and Racial Equity Action Plan in Y2, creating staff roles; integrating DEI across all business functions; and hearing and engaging our clients, staff, and board. Dedicated to these efforts, PATH funded all efforts independently in Y2 while fundraising to achieve financial sustainability.

## Advocacy

- Our policy and advocacy team flourished in Y2, maximizing opportunity and tapping into our staff, clients, board, and volunteers to vocalize our position on issues of homelessness and housing statewide. PATH and PV are increasingly emerging as trusted leaders across all our served regions and are grateful to act as a platform to vocalize our unhoused neighbors' needs. Not only have these efforts strengthened PATH and PV's infrastructure in Y2, but they also helped individuals develop their skills and learn how to advocate independently on homelessness and other issues impacting our communities.

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## Progress Toward Organizational Objectives

### DEI and Racial Justice

- Hired Matthew Soto, E.d.D., chief equity and inclusion officer (CEIO), to spearhead the incorporation of diversity, equity, and inclusion (DEI) into our governance and approach.
- With the marketing team, began a 2023 DEI communications plan to create external and internal messaging that celebrates racial and cultural diversity and gives a voice to our staff and clients who are Black, Indigenous, or People of Color (BIPOC).
- **Next steps:** Launch a DEI Council, an evolution of our DEI committee tasked with ensuring agencywide policies are inclusive.

### Staffing and Human Resources

- Drafted a policy for operating a professional development stipend for staff. We are still in conversations around developing an equitable approach and are identifying funding.
- Completed the business continuity plan, which will be used by our facilities management team in conjunction with emergency management plan. Both plans will ensure we can address immediate staff needs in time of crisis, ensure our staff and buildings are safe, and execute a plan to continue business operations.
- Finished and began implementing our clinical supervision program for staff. Identified staff lead who is matching staff with their colleagues who can

### Communications

- Achieved all objectives as planned.
- Continued building awareness around PATH and PV's statewide impact with a record 1,153 press mentions with 6.8B impressions in major publications such as MSN, Yahoo News, USA Today, Associated Press, LA Times, equating to a \$62.9M ad value.
- Became verified on Facebook and Twitter, gaining a record 13K followings on Facebook and 7.3K on Twitter. Also reached 11.4K on Instagram.
- **Next steps:** Work with CEIO to finalize and implement 2023 DEI communications plan and continue evolving in real time based on learned lessons.

### Financial Stability

- Hired Katie Tell, chief external affairs officer, and Kayhan Azadi, director of philanthropy and community affairs, to spearhead formalized major giving and planned giving campaigns.
- Launched PATH Enterprises, a social venture enterprise, in Q1 2022 to further diversify PATH's revenue. Initial projects included real estate acquisitions, interior design, and community engagement.
- Secured a \$5M grant from the Bezos Day 1 Fund to build our capacity to serve more families in two key areas: 1) investments in staff retention and training and 2) seed funding to hasten production for family housing production through PATH and PATH Ventures' new Predevelopment and Acquisition Fund. This will flexibly cover

provide clinical supervision. Every other week, staff participants attend a case study meeting and then meet the other weeks on more topical subjects.

- **Next steps:** For the clinical supervision program, will create a statewide group of supervisors to standardize the program and ensure we provide the right supports and prepare staff for exams. In addition, anticipate the completion of the compensation plan by Q3 2023.

## Policy

- Continued positioning PATH and PV as leaders, securing opportunities for CEO Jennifer Hark Dietz, LCSW to meet with President Biden; Hanan Scrapper, San Diego regional director, to testify to the House of Representatives' Veterans Affairs Committee in December; etc.
- Secured \$3.75M for two PATH and PV Project Homekey projects through federal Community Project Funding.
- Advocated for eight housing and homeless services bills that were later signed into law.
- Developed a plan to raise awareness around legislation and issues regularly and as they arise. Created a communications template with the media and marketing team for advocacy updates and asks. Will hold four community trainings annually: three virtual advocacy 101 meetings and one legislative forum.
- **Next steps:** Begin hosting in-person community trainings statewide. Establish a virtual quarterly Lunch with Your Lawmaker series with local elected officials across California.

costs such as land, appraisals, environmental assessments, and other upfront costs that will help complete in securing property. With investments from private donors, funds will be replenished through developer fees.

- **Next steps:** Continue building greater capacity in the finance team to ensure our functions can maintain pace with the mounting compliance of our growing government contracts.

## Operations and Governance

- Created a government grant evaluation tool that defines the core criteria of a right-fit government contract and asks staff to articulate how the opportunity moves PATH in a strategic direction. This questionnaire must be completed for a Request for Proposal (RFP) to be considered.
- Selected and worked with a board development consultant to complete a new board handbook and board orientation and mentorship program that provide clear expectations, guidance, and support for board service. Meeting regularly with the senior management team, the consultant surveyed the board of directors and staff leadership, assess opportunities for equitable representation, and identify streamlined engagement strategies.
- **Next steps:** Establish a weekly senior management meeting that will regularly discuss upcoming government contract opportunities to assess fit and feasibility.