



# 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

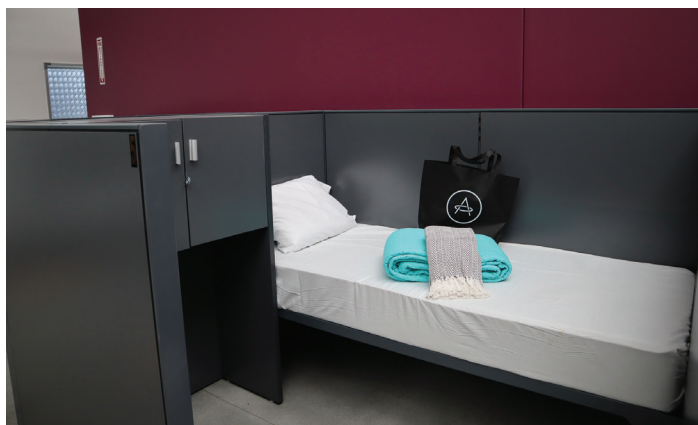
### Community Engagement

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: <ul style="list-style-type: none"> <li>• Board assessment and development plan</li> <li>• Plan to increase board diversity</li> <li>• Plan for regional advisory boards</li> <li>• Carry out regular Strategic Visioning</li> </ul>
Q3 2021	Develop board orientation program that includes: <ul style="list-style-type: none"> <li>• Mentorship program for new board members</li> <li>• Updated board handbook and orientation</li> </ul>



## 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*





# 2021-2023 Strategic Progress Report

## A PATHWay to the Future · First Annual Update

JANUARY-DECEMBER 2021

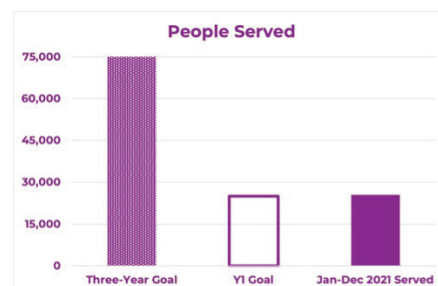
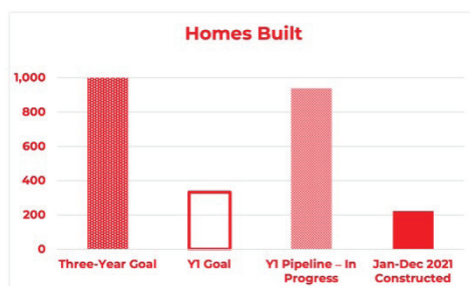
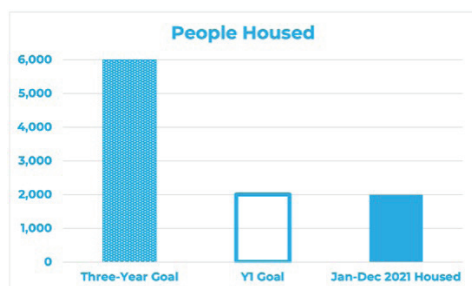


As we reflect on PATH (People Assisting the Homeless) and PATH Ventures (PV)'s strategic plan implementation, we are energized by the momentum of our first year. A PATHWay to the Future captured elements crucial to not only serving more unhoused Californians, but also ensuring we can sustain our growing operations. We are pleased to share the impact of our first year, made possible with the dedication of our staff, board of directors, volunteers, and stakeholders.

### PROGRESS TOWARD CORE GOALS

PATH and PV have made tremendous progress toward our three-year goals. In the past year, we have helped **1) 1,994 of our unhoused neighbors move into permanent homes** and provided **2) 25,476\* 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. PV has also constructed **3) 222 rental homes and has a growing pipeline of 938** units that will far exceed our three-year goal.



\*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

- PATH has spent the past year exploring our services' true cost after experiencing the growing pains of more than doubling our size. We have returned our attention to our core business functions and established processes to align our capacity with our contracts.
- We have invested resources in new staff roles, which have already enhanced our revenue, branding, operational support, technology, and more.

### Equity

- We have remained dedicated to our Listen, Learn, and Lead initiative, making steady progress in formalizing a DEI lens perspective across our operations and service delivery.
- Incorporating all internal and external stakeholders in our journey to being an anti-racist organization, PATH is using our findings from our initial listening phase to launch an action plan in 2022.

### Advocacy

- Our newly expanded public policy department approached last year with vigor, quickly developing a process to create new and nurture existing relationships with local elected officials and their staff. We brought in our board and staff to build upon our advocacy for priority bills and legislative proposals, which was crucial through continued COVID recovery responses.
- Further augmenting our capacity, PATH has developed plans to create a formal curriculum to immerse staff, board members, and volunteers in step-by-step advocacy trainings led by local elected officials, their staff, and PATH's staff.

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## PROGRESS TOWARD ORGANIZATIONAL OBJECTIVES

### DEI and Racial Justice

- Completed PATH's Racial Equity Action Plan, which created staff committees for seven strategic priorities that we will examine and strengthen through a DEI lens (i.e., staff development, lived experience, housing placements, human resources, communications, data and research, and advocacy).
- Launched PATH Academy with 25 staff members along with board members, staff leadership, and a consultant for facilitation. They have bimonthly convenings and have traveled to two of our regions for in-person gatherings.

**> NEXT STEPS: Hire DEI staff lead.**

### Communications

- Achieved all objectives as planned.
- Developed our intranet software, the PATH eHub, for staff to access organizational information, real time updates, and

staff communications. Completed a virtual staff training, also soliciting feedback for a last round of updates.

- Elevated our branding statewide through our new media and marketing team, with PATH leadership featured in major media outlets (e.g., USA Today, Newsweek, Al Jazeera English, MSN, Los Angeles Times, Yahoo).

**> NEXT STEPS: Finalize and launch the PATH eHub.**

### Human Resources

- Currently implementing training for the annual evaluation and performance review process. After completing this, we will communicate expectations for 30/60/90 day reviews and monthly supervision.
- Closing out the business continuity plan in Q1 2022. Staff leaders are incorporating edits and feedback, and we will reengage our consultants for finalization.



- Engaged a new consultant for the compensation plan and will use salary.com, a household name for compensation, to ensure competitiveness in pay. Completion is estimated to be Q2 2022.
- Developing a clinical supervision program for staff. Hired an internal staff to lead the pilot who will initially take on 10 staff. We will develop a statewide group to standardize clinical support for staff pursuing licensure.
- PATH must estimate cost of professional development stipend program for staff and identify funding. Rescheduled to be completed in 2022.
- **> NEXT STEPS: Continue current efforts and reassess for realistic timing and if other resources are needed to achieve goals.**

### Policy

- 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.
- Building upon our expanding capacity after hiring a public policy manager in August 2021, we formally partnered with USC's Center for the Political Future to receive interns each semester.
- The board policy committee continues meeting regularly to determine the alignment between legislation and PATH's mission and makes strategic decisions on PATH's messaging.
- **> NEXT STEPS: Launch community training program.**

### Financial Stability

- Interviewing for a chief external affairs officer and will be hiring a director of development and community affairs to spearhead new major giving and planned giving campaigns. Both

positions will help PATH increase reserve fund to \$5M by the end of 2023.

- Preparing to launch PATH Enterprises, a social venture enterprise, in Q1 2022 to further diversify PATH's revenue.
- Explored PATH's eligibility for the federal indirect rate and found that it was unviable and would not apply to our contracts universally. We will identify another approach.

**> NEXT STEPS: Onboard new staff and launch major giving and planned giving programs.**

### Operations

- Transitioned to new hiring software, Greenhouse, to support our HR department in filling 180 staff vacancies.
- Formalized expectations and design for regional advisory boards, including identifying and addressing each region's gaps in support.
- Identifying infrastructural needs to support existing and new contracts, incorporating quality assurance and compliance, finance, and recruitment staff into each grant. A small committee has been meeting with each department on programmatic growth, staffing levels, and budgets to inform this process.

**> NEXT STEPS: Develop a government grant evaluation criteria tool to determine feasibility of a new grant opportunity before pursuing.**

### Governance

Completed the request for proposal (RFP) to solicit board development consultant bids. To be strategic in timing, we will open the bidding process in Q2 2022. The RFP includes developing a board manual, training, DEI assessment, creating a board orientation process, and more.

**> NEXT STEPS: Open bidding process and complete consultant selection.**

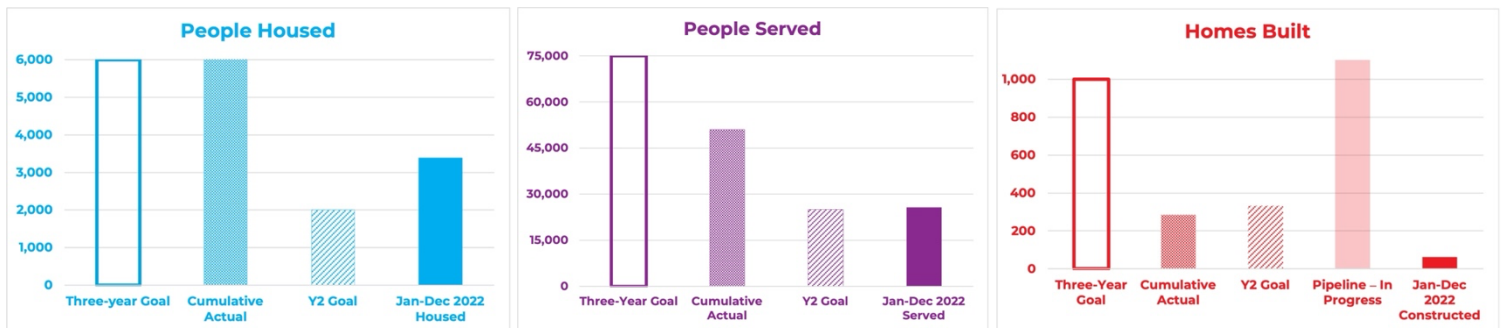


## 2021-2023 Strategic Plan Progress Report A PATHWay to the Future • Second Annual Update January-December 2022

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.

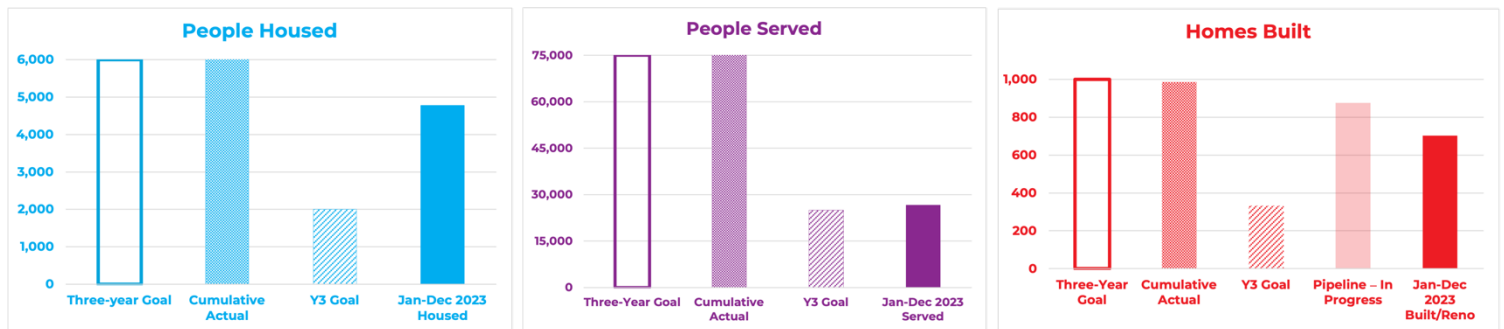
## 2021-2023 Strategic Plan: A PATHWay to the Future Final Annual Report: January-December 2023

The PATH Family of Agencies has reached the close of our 2021-2023 strategic plan, A PATHWay to the Future. We developed our plan at the peak of the pandemic, with our present and future both steeped in uncertainty. PATH was determined to embrace our unhoused neighbors as a safety net and knew that our strategic plan needed to be nimble and responsive.

Using PATH's mission to end homelessness for individuals, families, and communities as our compass, we identified capacity, advocacy, and equity as three strategic imperatives necessary to serving our community with a person-centered approach. Our efforts gave PATH the ability to quickly join initiatives such as Project Roomkey and Homekey while investing in our long-term operational sustainability. Three years later, PATH has gained valuable lessons that will continue guiding us toward helping unhoused Californians move into safe, healthy, and stable homes.

### Core Goal Accomplishments

We have seen significant success in our core goals during the past three years, helping **1) 10,144 of our unhoused neighbors move into permanent homes** and providing **2) 77,696\* 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 constructed or renovated **3) 987 rental homes**.



\*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.

### Organizational Objectives

#### DEI and Racial Justice

- Developed robust staff engagement strategies including 2,806 touchpoints with staff through 66 DEI events, workshops, and trainings.
- Widened network with partners such as The TransLatin@ Coalition, Indigenous Circle of Wellness, Los

#### Communications

- Reimagined and streamlined department structure and hired a digital media specialist to build team capacity.
- Increased PATH's visibility through 1,239 media placements, \$32.7 million ad value, 16,712 engagements to an audience of 3.53 billion individuals.

Angeles LGBT Center, and The San Diego LGBT Community Center.

- Presented at the annual Regional Taskforce on Homelessness conference. *Equity and Inclusion Efforts at PATH: Moving Beyond the Volunteer DEI Committee Model.*
- Created quarterly equity and inclusion board reports and established representation and diversity as priorities for board recruitment.
- Strengthened capacity by hiring a director of workforce and culture and DEI manager.

## **Policy**

- Worked with San Jose Mayor Matt Mahan's team to draft a shelter crisis declaration that included a commitment to affordable housing production.
- PATH policy team served as state leads for the National Alliance to End Homelessness' annual Advocacy Day on Capitol Hill, coordinating dozens of meetings with leaders in the House and Senate.
- Held an interactive training for Orange County staff on how to advocate for homelessness and housing priorities with elected officials.
- Staff joined local LA elected officials to demonstrate the need to protect Measure ULA, a new local revenue source for affordable housing.

## **Staffing and Human Resources**

- Completed compensation analysis and created a three-phase rollout, with the first two occurring in the past year to ensure wages reflect the market.
- Created an annual evaluation staff workgroup that assessed PATH's performance evaluation process and tools. Simplified the review templates and rolled out a new training to ensure understanding.

- PATH's work and leadership featured in international and national outlets such as the Guardian, Associated Press, Bloomberg, and Fast Company.

## **Operations and Governance**

- Hired and working with strategic plan consultants to create our 2024-2028 plan. Solicited feedback via stakeholder interview; staff and board focus groups; and surveys for external stakeholders, clients, board, and staff.
- Working with a consultant to build out a customized Salesforce contract database and anticipate launching by end of 2024.
- Trained staff on evidence-based practices (e.g., trauma-informed care, verbal intervention, motivational interviewing, and Mental Health First Aid). Completed plans to launch new training database, Eloomi, in 2024.
- Advocating to government funders for full cost contracts.
- Added regional directors in Santa Barbara and Los Angeles to have a larger leadership presence in the community and create more support for the team.

## **Financial Stability**

- Assessing PATH's public contracts for financial feasibility and informing strategic business decisions.
- Planning PATH's 40<sup>th</sup> anniversary, where we will launch fundraising campaigns for planning giving and annual giving circles.
- Created a statewide calendar of fundraising events and added capacity by hiring a new special events manager.
- Currently developing a plan for corporate donors to ensure we are maximizing our partnerships through volunteer, sponsorship, donation, and grant opportunities.