



2012 – 2015  
**STRATEGIC  
ROAD MAP**

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# executive summary

“Community Housing Partnership provides a platform from which individuals and families can rebuild their lives, realize their true potential, and re-engage with their community”

In the fall of 2011, Community Housing Partnership (CHP) engaged La Piana Consulting to assist in developing a roadmap that would guide us through 2014. It was time for us to reevaluate the environment in which we operate and refresh our strategic plan so we can sustain our impact on improving the lives of the formerly homeless.

At this time the environment in which we operate is full of uncertainty. An already complex and difficult funding environment for the development of affordable housing has been further aggravated by the abolishment of redevelopment agencies. Further compounding the uncertainty is the increased number of foreclosures, the high unemployment rate, and a growing number of people in poverty. All of this is intensified by the fact that we operate in one of the most expensive housing markets in the nation. The overabundance of low wage jobs, few housing options for low wage earners, and high land costs exacerbate San Francisco’s housing market.

However, even in the midst of all the economic challenges and uncertainty, we have much to look forward to. CHP has a results-based organizational culture and a history of assessing our environment and formulating the team, developing the strategies, and charting the course to navigate it. The current environment presents challenges, but for CHP it is also one full of opportunity. As the need for housing and services for the formerly homeless rises, and as federal, state and local governments slash social services to meet their budgets, we have the opportunity to share our cost-effective formula to ending homelessness — over 98% of CHP’s residents retain their housing each year. This report lays out the roadmap we intend to follow through 2014 in order to meet our challenges and capitalize on opportunities, so that we continue to produce results.

As a result of the strategy and planning process

two significant challenges emerged that we must currently meet:

- 1) Responding to a growing need and increase in the number of people served while adjusting our service model in response to decreased funding; and 2) developing a strategy to approach advancement (fund development and external positioning) differently.

La Piana Consulting’s Real-Time Strategic Planning methodology asks organizations to scan the field and identify the best role for the organization to play in achieving its mission. Through a participatory process informed and guided by our strategy team — formed to guide the process — board members, staff, residents, and key external stakeholders, which included business, program officers, and government officials, informed the strategies needed to meet the challenges and capitalize on the opportunities. With key stakeholder input the strategy team, board and staff identified our competitive advantage and six goals as well as objectives for each of the six goals to meet these two critical challenges.

CHP’s competitive advantage or the distinct value we bring comes in three areas:

- An organizational culture of tenant empowerment
- Leadership in providing permanent supportive housing and opportunities for tenants
- A clearly defined mission

*The six adopted goals are:*

### **Goal I**

Preserve and expand supportive housing by providing exemplary housing and services to current tenants, and developing additional supportive housing in San Francisco, and extend CHP's high quality services to tenants of supportive housing who would benefit from housing-focused services.

### **Goal II**

Deepen engagement in public policy by designing and advocating for policy initiatives at the local, state, and federal level that enhance supportive housing, and establish CHP as the leading organization for solutions to end homelessness demonstrated by innovation and proven effectiveness.

### **Goal III**

Expand private donations and volunteer opportunities through increased engagement in actively soliciting private contributions, both individual and corporate, and expand network and scale of foundation support. Create meaningful opportunities to engage the community in a volunteer capacity to enhance programs and to build corporate and community support.

### **Goal IV**

Maximize the value of CHP's Social Enterprise by cultivating entrepreneurial practices to expand job opportunities for supportive housing tenants and demonstrate that formerly homeless individuals can successfully maintain employment.

### **Goal V**

Engage in organizational development that optimizes CHP's service model to better serve our tenants, operate more efficiently, and develop staff potential.

### **Goal VI**

Increase the board's capacity to build CHP's reputation and fund development through targeted participation and by strengthening and developing board members' abilities.

## **Overview of Goals**

These goals and related objectives provide the board and management a guide for leading the organization in the coming years.

Our strategic road map challenges the organization to be innovative so we can respond to a growing community need, to extend ourselves and play a role in places where we have been absent, and to continue to increase the board's engagement, so the organization has the recognition and resources to meet our mission.

The strategy development and planning process provided a vehicle to begin a shift within CHP that includes greater board involvement and more opportunities for staff and board to interact. Such interaction was modeled by the strategy team that was formed to guide the process, which was led by our board president and included other board members and senior and junior staff. With this shift already in process and with our collaborative and visionary leadership, and a results-based staff that is committed to providing CHP residents the highest level of client service, CHP is developing the culture, and has the team and strategy to advance our mission.

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# mission

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CHP creates, implements, and demonstrates solutions to homelessness by working in partnership with people in San Francisco who would otherwise be without a home. CHP develops and operates high quality permanent affordable housing, integrating optional support services, job training, and community organizing. We strive to break the cycle of homelessness by strengthening community, encouraging self-determination, and involving tenants in every aspect of the organization.

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## core values

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CHP's core values strongly influence the work we do each day.

### **Opportunity**

We create opportunities for people to overcome homelessness and achieve their personal goals by focusing on housing retention, hiring people who were once homeless and providing learning opportunities to residents and staff.

### **Participation**

We work hard to make sure everyone involved with CHP has an opportunity to share their ideas and opinions. All residents, staff, and board members are encouraged to help run CHP, especially line staff and those who have been homeless.

### **Community**

We seek to build sustainable communities at all of our sites, develop leaders, and maintain strong and caring relationships throughout our organization.

### **Self-Determination**

We respect the rights of individuals to be who they are, make their own decisions, and live their lives without fear of unfair judgment. Our commitment to harm reduction and voluntary services reflects this respect.

### **Activism**

We work with our allies to create new solutions and policies that advance our mission and promote social justice, organizing around a variety of issues in recognition of the need for affordable housing, health care, living wage jobs, and safe communities to truly end homelessness.

### **Spirit**

We voice our opinions as we work for change, bringing energy, passion, creativity, and commitment to everything that we do

# background and process

## Background

Founded in 1990, CHP is the only San Francisco nonprofit organization exclusively dedicated to providing permanent, supportive housing to formerly homeless individuals and families. CHP owns or manages twelve buildings with 905 units, with an additional 165 units in development. These supportive residences address the needs of seniors, families with young children, youth at risk of homelessness, and adults with physical or cognitive disorders.

CHP provides an essential and comprehensive network of services including job training and placement opportunities, social enterprise, family and youth programs, substance abuse treatment, and community organizing. These services annually impact the lives of 1,800 formerly homeless adults and children by supporting them in retaining their housing and leading stable, productive lives.

In the spring of 2011 we set out to develop strategy that would guide the organization in coming years. We engaged La Piana Consulting to assist with a strategy development and planning process that would contribute to developing the board's development as a generative body. La Piana's approach to strategy and planning, labeled Real-Time Strategic Planning, operates from a strengths-based approach and consists of a focused process that seeks to clarify the organization's identity, role in the field, and to develop strategies that advance its objectives. La Piana's approach was responsive to our desire to solidify our identity and place in the field, engage the board and staff, and involve residents and external stakeholders in the process.

## Process

As part of the strategy and planning process we formed a strategy team whose role was to guide the formation of our strategy and planning process. The strategy team consisted of four staff and four board members. We were intentional about including our board members and asking our board president to assist in leading the

process as we shift towards increasing board member involvement. As part of the listening process and in an effort to better understand the opportunities and challenges facing CHP, our consultant team interviewed five board members and mid-level managers that were not part of the strategy team. These interviews assisted in providing greater context for where CHP finds itself today — including our work with tenants and as a team.

One of the early tasks of the strategy team was to identify our closest competitors and their greatest strengths. This exercise assisted in preparing us for our one day strategy session, which viewed our competitors strengths and grounded the senior staff and board in a conversation seeking alignment about who we are (our overall identity;



what distinguishes CHP from others working in the field), the competitive advantage we bring to achieving our mission, the criteria we should use in deciding how to respond to challenges and opportunities facing the organization (a strategy screen; and identifying the most critical questions facing CHP today). More than twenty-five senior staff and board members participated in the one day strategy session and provided the information needed to begin the process of identifying the direction for our organization.

The strategy team synthesized the information gathered from the one day strategy session, the five board members and mid-level manager interviews, refined the decision making criteria, strategic questions, and identified strategic options that answer the strategic questions facing CHP today. The strategy team also identified external stakeholders with whom our consultant tested our emerging strategic options through individual interviews. The strategy team continued to meet about every four to five weeks to prepare its recommendations for our overall strategy to the board of directors.

External stakeholders provided feedback on our perceived competitive advantage and direction for the strategic options drafted by the strategy team. Their comments to our strategic options are embedded in the competitive advantage, and strategic options sections of our strategic plan.

Stakeholders interviewed:

- Olson Lee, Director, San Francisco Mayor's Office of Housing
- Mark Trotz, Director of Housing and Urban Health, San Francisco Department of Public Health
- Carla Javitz, President, REDF
- Sarah Karlinsky, Deputy Director, San Francisco Planning and Urban Research Association (SPUR)
- Jonathan Hunter, Managing Director, Western Region, Corporation for Supportive Housing
- Steve Bowdry, Principal, Bowdry Properties
- Vanitha Venugopal, Program Director, Community Development and Investment, The San Francisco Foundation

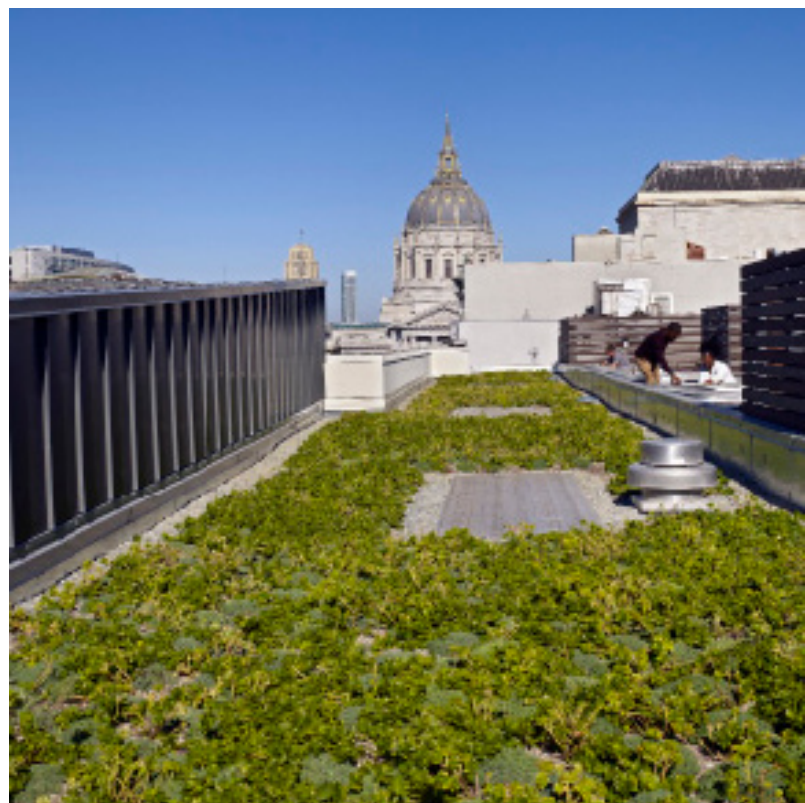
The strategy team used the feedback provided by the external stakeholder interviews to fine tune our strategic goals, objectives, and outcomes for five of the six strategic recommendations.

The board of directors developed the strategy goals, objectives, and outcomes for the sixth strategic recommendation, which is specific

to the board. The board and staff members of the Housing Committee provided an extra level of guidance for the strategic goal specific to Expanding Supportive Housing. The board of directors also reviewed drafts of the competitive advantage and strategic goals in response to the current challenges and provided their guidance on the direction of both.

Before finalizing our strategic goals, in efforts to get tenant input on the competitive advantages and strategic goals, the board and staff were asked to lead small group discussions with tenants and seek input into the staff and board's decisions. The feedback gathered from the tenant focus groups was integrated into the final document.

Our consultant team assisted us in drafting our strategic roadmap in order to memorialize our decisions, including criteria for ongoing decision-making (strategy screen) and organizational strategies. At the January 24, 2012 board of directors meeting, the board of directors adopted the strategic plan and committed to providing guidance, and resources in efforts to meet the opportunities and challenges identified within the strategic plan.



# identity statement

An identity statement is an honest description of an organization at a moment in time. It incorporates critical defining elements of an organization's mission, business model, and organizational strengths. Effective strategic choices are rooted in a firm understanding of "who we are" as an organization.

At this time, CHP's identity is defined as the following:

<b>Mission</b>	Create, implement and demonstrate solutions to homelessness working in partnership with people who would otherwise be without a home.
<b>Result</b>	The cycle of homelessness is broken. Community is strong. Tenants determine what they need.
<b>Whom we serve</b>	Formerly homeless
<b>Where we work</b>	San Francisco
<b>How we do this</b>	Provide supportive housing, job training, jobs, and tenant services
<b>Our Competitive Advantages</b>	Organizational culture of tenant empowerment Leadership in providing permanent supportive housing and opportunities for tenants Our clearly defined mission
<b>How we are funded</b>	Government, Earned Income, and Donor Contributions

## What We Do and Results We Seek

Through a clearly defined mission to seek out solutions to end homelessness in partnership with people who would otherwise be homeless, we provide supportive housing, job skills, and opportunity for the formerly homeless in order for them to build a life of self-sufficiency and contribute to strengthening our community.



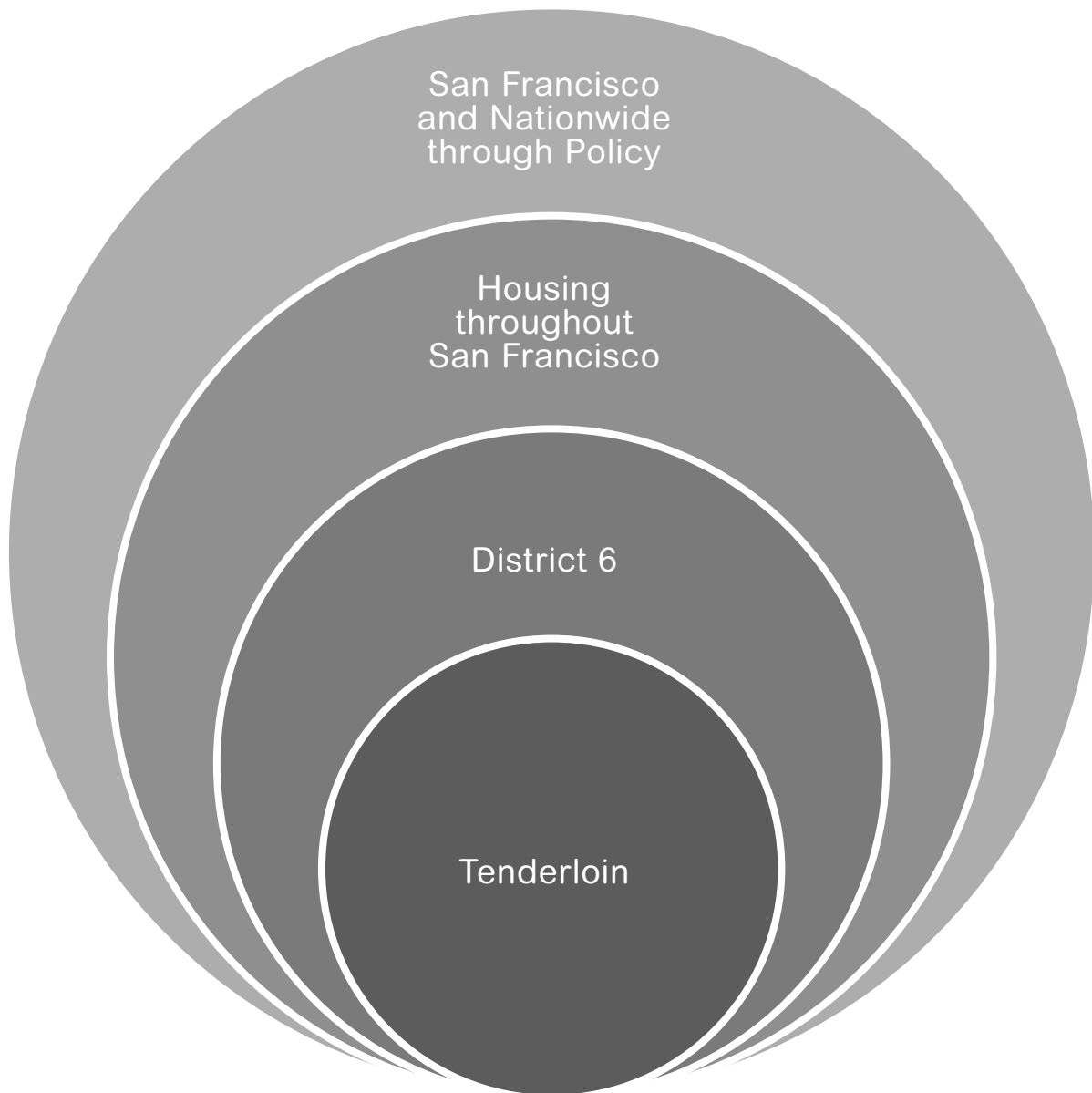
# constituents

Although we are responsive to various stakeholders, our primary constituencies are formerly homeless individuals and families, and those with the fewest options (i.e., people with mental health issues, substance use, complex medical issues, foster youth, the formerly incarcerated, and those with a high acuity). Our business model has been constructed so that our residents contribute to the organization, and as a collaborative effort with local government and the broader San Francisco community. In the interests of the formerly homeless, responding to the needs of these stakeholders is vital to our success.



# geographic area of influence

Our direct services are all in San Francisco. Although almost all of our housing and programs are located in the Tenderloin and other parts of supervisorial District 6, we look for opportunities to share our solutions to homelessness throughout San Francisco. Through our innovative local solutions, we impact homeless policy nationwide.

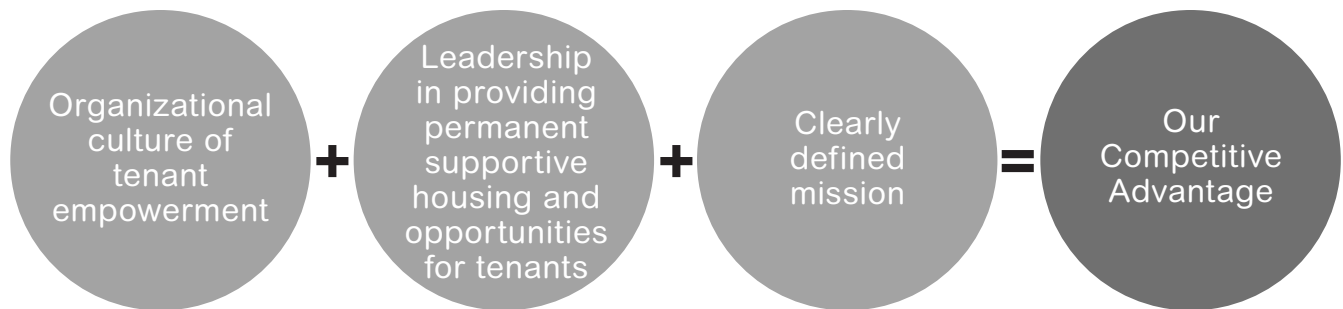


# competitive advantage

Competitive advantage is defined as having the ability to produce social value by using a unique asset and/or having an outstanding execution (e.g., being faster, less expensive, having better service, than similar organizations in your geographic area).

CHP's competitive advantage is based on three specific areas:

- Our organizational culture of tenant empowerment
- Our leadership in providing permanent supportive housing and opportunities for tenants
- Our clearly defined mission



# organization strategy screen

A strategy screen is a list of criteria used to guide decision-making. In addition to supporting intentional decision-making, it is also a valuable planning tool, teasing out information needed to succeed and issues to address in implementing critical decisions. The strategy screen is used in the current strategy development process, and is also a tool that we can use on an ongoing basis.

The strategy screen developed by CHP includes the following elements:

<b>Is this decision ...</b>	
√	the best way to achieve our mission?
√	leveraging and/or supporting our competitive advantages around tenant-infused activities and a clear mission?
√	putting us at a financial risk?
√	allowing us to improve and to innovate?
√	based on our capacity can we be really good at this?
√	building our political influence in order to accomplish our mission?
√	impacting our perception, reputation, and relations with stakeholders?
√	allowing us to promote long-term viability?
√	optimizing and satisfying our resources? (satisfying = social, and political resources)
√	a better use of funds than pursuing other opportunities?

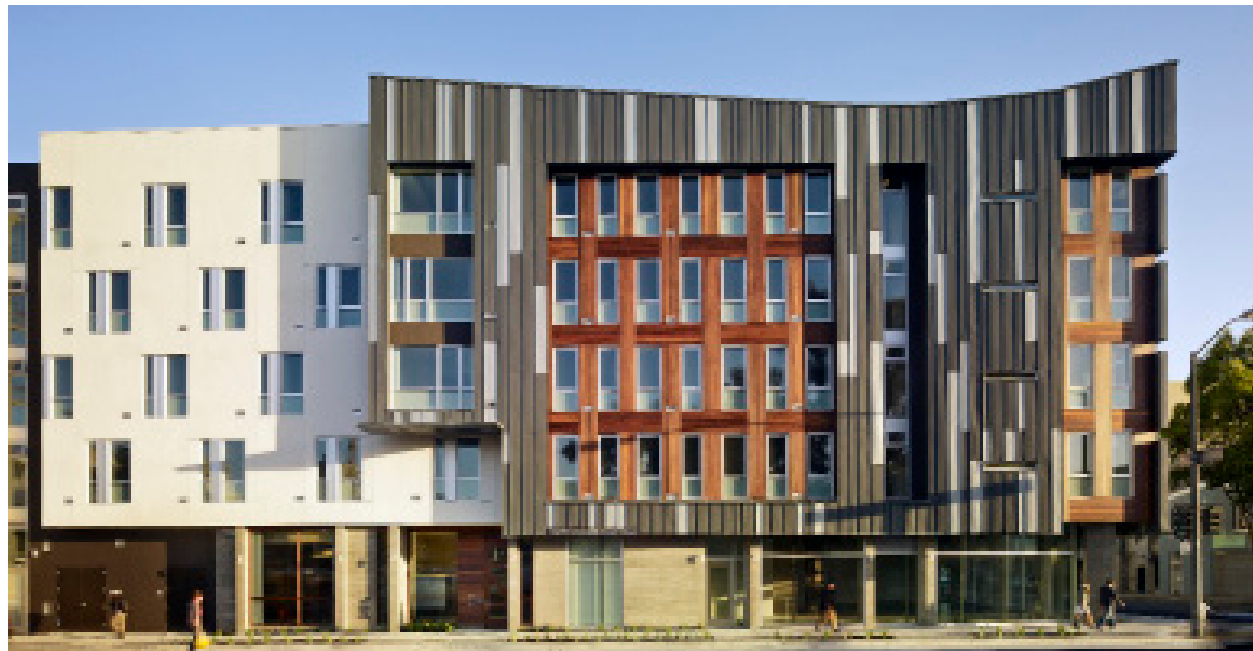
# organizational strategy

Homelessness is a systemic crisis that deeply impacts our community. In San Francisco alone, there are an estimated 7,000 to 10,000 people sleeping on the streets, in cars and other unsuitable places, or in shelters every night. Many of these vulnerable people are children, seniors, or those afflicted by physically or mentally disabling conditions. In fact, families are one of the fastest growing segments of the homeless population, causing devastating effects on the development of young children. This crisis is devastating to the people who endure it and affects the quality of life of everyone in our city. It requires a permanent, integrated solution designed by the people who have first-hand knowledge of the issue.

Founded in 1990, CHP is the only San Francisco nonprofit organization exclusively dedicated to providing permanent, supportive housing to formerly homeless individuals and families. CHP owns or manages twelve buildings with 905 units, with an additional 165 units in development. These supportive residences address the needs of seniors, families with young children, youth at risk of homelessness, and adults with physical or cognitive disorders. We provide an essential

and comprehensive network of services including job training and placement opportunities, a social enterprise, family and youth programs, substance abuse treatment and community organizing. These services annually impact the lives of 1,800 formerly homeless adults and children by supporting them in retaining their housing and leading stable, productive lives.

Our board of directors, staff, and strategy team identified two critical questions facing CHP today, and developed strategic recommendations in response to those questions. We tested the questions and recommendations with external stakeholders to ensure they are aligned with our current environment. The external stakeholders agreed that we have identified the appropriate questions and offered their views on the best possible strategies.



# strategic questions and direction

## Strategic Questions

1. How do we respond to a growing need and increase the number of people we serve while adjusting our service model in response to decreased funding?
2. How do we approach advancement (fund development and external positioning) differently?

## Strategic Direction

### Goal I

#### Preserve and Expand Supportive Housing

Provide exemplary housing and services to current tenants and develop additional supportive housing in San Francisco. Extend CHP's high quality services to tenants of supportive housing who would benefit from housing-focused services.

1. *Objective:* Pursue all opportunities to house those that may benefit from a permanent supportive housing model and who would otherwise be at risk of homelessness (e.g., vulnerable families and individuals, veterans, frequent users of public services, people who are exiting the criminal justice system).
  - a. *Outcome:* Add two permanent supportive housing projects to our pipeline.
2. *Objective:* Pursue all opportunities to provide services to residents of permanent supportive housing who would benefit from CHP's services model (tenant-focused, civic engagement, job readiness philosophy).
  - a. *Outcome:* Increase the number of people that we provide services to by 15%.
  - b. *Outcome:* Increase Medi-Cal billing to cover 30% of the intensive case management program cost.

### Goal II

#### Deepen Engagement in Public Policy

Design and advocate for policy initiatives at the local, state, and federal level that will enhance supportive housing. Establish CHP as the leading organization for solutions to end homelessness demonstrated by its innovation and proven effectiveness.

3. *Outcome:* CHP will actively engage in public policy work with groups and stakeholders in supportive housing and foundation circles.
  - a. *Outcome:* Lead and collaborate with other stakeholders on a statewide or local initiative.
  - b. *Outcome:* Speak/present at two conferences and publish one white paper or op-ed each year.
  - c. *Outcome:* Participate on the planning committee for one state-wide conference.

4. *Objective:* Work to develop a proposal for a local and/or state dedicated funding source(s) for support housing development, operations, and services.
  - a. *Outcome:* Participate on the planning/steering committee for a dedicated funding source.
  - b. *Outcome:* 51% of our stakeholders are mobilized to advocate for a dedicated funding source.

### **Goal III**

#### **Expand Private Donations and Volunteer Opportunities**

Increase engagement in actively soliciting private contributions, both individual and corporate. Expand network and scale of foundation support. Create meaningful opportunities to engage the community in a volunteer capacity to enhance programs and to build corporate and community support.

5. *Objective:* Create and execute a corporate and individual fundraising plan that promotes innovation and effectiveness.
  - a. *Outcome:* Have an advancement committee comprised of volunteers and board members.
  - b. *Outcome:* Increase corporate donations by 5% each year.
  - c. *Outcome:* Have twenty-five investors who give or bring in \$5K per year.
6. *Objective:* Create and execute a social media plan to raise CHP's visibility and attract new donors.
  - a. *Outcome:* Double the number of social media contacts each year.
  - b. *Outcome:* Increase the number of press mentions by 25%.
7. *Objective:* Create meaningful volunteer opportunities under CHP's Building Together Program to promote CHP, bring in new resources, strengthen community connections, and increase awareness about homelessness.
  - a. *Outcome:* Have a comprehensive volunteer program with three main components: 1) tenant volunteers; 2) one-day corporate volunteer events; and 3) long-term volunteer options.
  - b. *Outcome:* 10% of CHP tenants will be volunteering in their building or in the community.
  - c. *Outcome:* Have 4 one-day volunteer events each year.
  - d. *Outcome:* Have a pool of 50 volunteers who contribute a minimum of 6 hours per year to CHP (excluding board of directors members).

## Goal IV

### Maximize the Value of CHP's Social Enterprise

Cultivate entrepreneurial practices to expand job opportunities for supportive housing tenants and demonstrate that formerly homeless individuals can successfully maintain employment.

8. *Objective:* Increase the social impact of employment with Solutions SF.
  - a. *Outcome:* Double the number of employees to eighty.
  - b. *Outcome:* Increase the number of FT and PT employees by 25%.
9. *Objective:* Achieve scale so the enterprise can be self-sufficient and support its growth.
  - a. *Outcome:* Have two business lines that break even without government or private subsidy.
10. *Objective:* Positively engage our target demographic with work and create a path of upward mobility.
  - a. *Outcome:* 75% of Solutions SF employees will be from the target demographic of homeless and formerly homeless.
  - b. *Outcome:* Place 20% of workforce in unsubsidized, full time, benefitted employment annually.

## Goal V

### Organizational Development

Optimize the CHP service model to better serve our tenants, operate more efficiently, and develop staff potential.

11. *Objective:* Develop and execute a replicable supportive housing staff training model to better serve our tenants and operate more efficiently.
  - a. *Outcome:* Have best-in-class, community-focused property management services within a supportive employment environment.
  - b. *Outcome:* Develop a replicable in-depth peer support model that increases the quality of tenant engagement by 50%.
12. *Objective:* Establish a staff development program for entry-level staff so we continue to develop a high-functioning, tenant-focused environment with proven outcomes.
  - a. *Outcome:* Have a clear plan for entry level positions that includes an outline of core competencies that align with the job description and defines training and support.
  - b. *Outcome:* Have a clear advancement path for all positions that defines the skills, experience, and training needed for internal promotion and professional development.
  - c. *Outcome:* Hire so that more than 65% of our staff members are formerly homeless people.



13. *Objective:* Establish a staff development program that promotes growth and advancement so we continue to have a high-functioning, tenant-focused environment with proven outcomes.
  - a. *Outcome:* All supervisory staff will have individual development plans by 2013.
  - b. *Outcome:* 65% of non-entry level positions will be filled by internal promotions.
14. *Objective:* Leverage the housing portfolio to maximize the revenue to CHP's central operations and provide resources to increase our capacity to fulfill the mission.
  - a. *Outcome:* Produce 80% of maximum potential revenue from the properties to the CHP parent organization.

## **Goal VI**

### **Advancement and Board Development: Increase the board's capacity to build CHP's reputation and fund development.**

15. *Objective:* The board, executive director and resource development staff will create and implement an annual resource development workplan for the board as a whole and for each board member that utilizes the board's skills and talents to further CHP's advancement.
  - a. *Outcome:* Each board member will participate in the development of a set amount of funds through donor or foundation visits, talent show sponsorship recruitment, assisting in fundraising events, being active in the Advancement Committee, or other means.
  - b. *Outcome:* Each board member will promote CHP in at least one forum each year that expands or strengthens CHP's reputation and reach.
16. *Objective:* Increase the board's capacity to assist in the implementation of the strategic plan.
  - a. *Outcome:* The board will evaluate its structure and operations and implement changes to improve its ability to support the organization's achievement of the goals in this strategic plan.