



Committee On The Shelterless

Strategic Plan

For the Period November 2020 – June 30, 2023

As of 11/10/20



People **experience** homelessness. It is a state of address, not an identity. It is not a character flaw.

Iain De Jong

Table of Contents

Section	Page #
1. Our Story	4
2. Our Mission, Vision, and Values	6
3. Our Goals, Objectives, Quarterly Report of Progress	7
4. Elements of Strategic Planning at COTS	10
5. Our Process to Create our Strategic Plan	13

This Strategic Plan is dedicated to COTS Board of Director member Judy Tuhtan. After 15 years of services to COTS, Judy has decided to step off the Board and allow the next generation of leaders to provide direction and support to COTS.

She has held almost every position on the Executive Committee and has provided strong and visionary leadership during her years of dedicated service.

She is passionate and caring toward all who experience homelessness and greets everyone with a great big warm smile, words of thanks and encouragement, and of course a hug. She is affectionately known as our Chief Hugging Officer – CHO.

*Judy exemplifies all of our Values in this Strategic Plan – **Integrity** and how she acts with honesty and reliability; **Respect** for the diversity of experiences and opinions of others; **Collaboration** and her ability to foster relationships in our community; **Celebration** and always applauding the success of others; and **Outcomes** and her focus on providing the best client-centered services for those we assist.*

Thank you Judy for your heart, your caring nature, and your compassion for our community, our staff at COTS, and for those experiencing homelessness.



Our Story

Founded in 1988, COTS was an expression of two local residents' concern for children and adults who were sleeping in culverts, dumpsters, or other unsafe and unsuitable conditions. Laure Reichel and Mary Isaak, along with hundreds of dedicated and compassionate volunteers, raised money from private donors, enlisted the support of the faith community and fraternal organizations, educated the larger community about homelessness, and monitored sleepovers at temporary shelters throughout the city. Their vision was to end homelessness.

Thirty-two years later, we are still engaged in this challenge with the hope of ending homelessness in Sonoma County. This challenge, however, is now more difficult and more important than ever. According to the 2019 Point in Time Count, there are some 3,000 individuals experiencing homelessness in Sonoma County. Many suffer from physical, mental, and emotional hardships. Funding from federal, state, and local government continues to be a challenge. There is more competition for fewer dollars. National politics and social protests weigh heavily on many. The cost of living and finding affordable housing in Sonoma County is difficult, even for those with good wages and stable employment. COVID-19 and its consequences created an economic recession, social anxiety, and more homelessness. And seasonal fires... are now becoming the norm.

All of this means that to make COTS even stronger as a business and a social and human services organization, we must offer impactful and innovative programs that get people stably housed; have a stronger leadership presence and collaborative partnerships throughout Sonoma County; be financially sustainable to ensure we are able to do this important work for the next thirty-two years; create effective, efficient, and strategically aligned business processes that integrate and support our programs for those experiencing homelessness; and we must ensure that we have the right, professionally trained

and compassionate staff, and a high performing culture to thrive in this ever changing and more complex environment.

There are few things more damaging to the human spirit and more harmful to an entire community than for a person of any age to experience homelessness. Homelessness is complicated and there are many reasons why a person becomes homeless. Those reasons cannot be solved by a hot shower, a warm meal, or a bed. Shelters are designed to provide only temporary safety while a person sorts out a permanent place to live. If we are to help someone, then we must address the issues that caused their homelessness, including loss of employment, physical and behavioral health challenges, childhood trauma, and lack of social supports and life skills. Our Strategic Plan intends to do just that. Through our new Client Enrichment Program, we will offer financial literacy courses, budgeting workshops, credit repair counseling, housing search support, landlord relations training, and employment readiness services such as creating resumes, mock interviews, and preparing cover letters. Through our Pathways recovery options, we will offer recovery groups, sobriety programs, and set-aside shelter beds and housing for those who agree to maintain abstinence from substances. Because we know we cannot do this work alone, we are also strengthening our community partnerships to offer more mental health counseling, Legal Aid services, and comprehensive street outreach for those living on the streets or in encampments.

Through it all, our cherished Volunteers will continue to play a large role in assisting with these various services, including our kitchen. Of course, this all hinges on creating a safer environment post-COVID.

Our new Strategic Plan provides an updated, innovative, results-driven, businesslike, and collaborative framework to accomplish our Mission of *Assisting*

those experiencing homelessness in finding and keeping housing, increasing self-sufficiency, and improving well-being. With the help, faith, and trust of our supportive community, our cherished volunteers, awesome staff, and engaged leadership from our board of directors, we can and will achieve our Mission.

Mission Statement

(Why we exist; our core purpose; the benefits we bring to the world.)

We assist those experiencing homelessness in finding and keeping housing, increasing self-sufficiency, and improving well-being.

Vision

(Our North Star; what we wish the world to look like; and how we inspire our employees, clients, and communities.)

We envision a community where everyone has a place to call home.

Values

(What we believe in; how we treat each other; make decisions; and carry out our Mission, Vision, Goals and Objectives.)

Integrity: We act with reliability and honesty and take ownership of our roles.

Respect: We honor the diversity of perspectives, experiences, and the needs of others.

Collaboration: We foster constructive relationships within our community.

Celebration: We take pride in our work and applaud each person's successes.

Outcomes: We rely on best practices to provide data-driven, client-centered services.

Strategic Plan – Goals & Objectives For Year Ending 6/30/21

Pathways to Success	Goals	Objectives
Administrative	Create effective, efficient, and strategically aligned businesses processes that integrate and support our Programs and Services for those experiencing homelessness.	<ol style="list-style-type: none"> 1. Complete Succession Plan for all major roles by 6/30/21. 2. Implement technology, such as transferring all files from traditional servers to the Cloud, greater use of DocuSign and the Human Resource IBS system, by June 30, 2021. The intent is to create more efficiencies and cost savings in work processes. 3. All program data are entered into appropriate databases within grant compliance parameters and reports are updated and evaluated at least quarterly.
Brand	Strengthen community engagement and promote COTS as the leading homeless service provider in Sonoma County.	<ol style="list-style-type: none"> 1. Achieve the highest rating from Charity Navigator (4-Star) and Guide Star (Platinum) by December 2021 2. Post 3-5 Social Media posts weekly; submit Letters to the Editors or Op Eds at least Quarterly to Argus Courier/Press Democrat; create three Newsletters Annually. 3. Create two Townhall meetings annually in Petaluma to educate the community on Homelessness.
People and Culture	Create a competitive advantage by hiring the best people; create a	<ol style="list-style-type: none"> 1. Achieve 90% or greater for Overall Employee Satisfaction on the Annual Employee Satisfaction Survey. This includes at least 75% employee participation rate in the survey.

Pathways to Success	Goals	Objectives
	safe, supportive, and innovative environment; and celebrate our successes.	<ol style="list-style-type: none"> 2. Create Annual Training Program for all staff. This includes programs such as Trauma Informed Care, Motivational Interviewing, and Crises Intervention. 3. Achieve Turnover of 19% or less for All Staff. 4. Conduct Annual Volunteer Satisfaction Survey and also have three Volunteer Town Hall Meetings annually to communicate with Volunteers about COTS.
Financial Sustainability	Ensure we are financially sustainable and have resources to achieve our Mission, Vision, Goals, and Objectives.	<ol style="list-style-type: none"> 1. Achieve Annual Operating Surplus of \$50,000 net of Depreciation by 6/30/21. 2. Grow philanthropic revenue by 2 - 5% per year. 3. Obtain 5 new Planned Giving written commitments each year. 4. Maintain Days in Cash at 60 Days by 6/30/21.
Social Impact	Provide services that enable individuals experiencing homelessness to obtain and maintain permanent housing and improve overall quality of life.	<ol style="list-style-type: none"> 1. 80% (46 of 58) of those receiving Rapid Rehousing Assistance (RRH) obtained and maintained permanent housing at program exit. 2. Maintain stable Integrity Housing rooms for a minimum of 25 families/individuals. 92% (110 of 120) individuals served will remain in program or obtain other permanent housing at program exit. 3. Offer short term shelter to a minimum of 300 single adults annually in the Mary Isaak Shelter program.

Pathways to Success	Goals	Objectives
		<p>4. Through our Enrichment, Pathways, and Case Management services, 21% (63 of 300) of Mary Isaak Shelter clients will obtain permanent housing at program exit.</p> <p>5. 80% (28 of 35) of Homelessness Prevention recipients will maintain permanent housing at program exit.</p>

Elements of Strategic Planning at COTS

Our Foundation

At our core, we have a Mission Statement and Values that help to guide everything that we do. Our strategic planning process must always keep our Mission and Values in mind.

Mission Statement – this is about why we exist, our core purpose, and the benefits we bring to the world. It should be short enough to fit on a t-shirt.

Values – What we believe in, hold true, how we treat each other, behave, make decisions, and carry out our Mission, Vision, Goals and Objectives.

The Elements of Strategic Planning

If you asked ten people their thoughts and approach to a Strategic Planning (SP) process, you'd likely get ten different answers. There is no one right way to do SP. There are, however, elements that an organization should get right in whatever approach they take. The purpose of this document is to share The Elements of Strategic Planning that COTS used for their updated SP. Those elements are:

- **Vision Statement** – This is our North Star, what we wish the world to look like, and the direction we are headed with the intention to inspire our employees, clients, and communities.
- **SWOT Analysis** (Strengths, Weaknesses, Opportunities, Threats) – We perform a SWOT Analysis at the beginning of the SP process to inform the development of our Goals and Objectives.
- **Goals and Objectives** – The substance of our strategic planning is accomplished through setting Goals and Objectives. Goals are general guidelines that explain what we want to achieve. They are usually high level and general in nature. Objectives are more specific and define specific measures to understand if our strategies are being successful to achieve the identified goals. The SMART concept is applied to Objectives - **S**pecific (simple, sensible, significant), **M**easurable (meaningful, motivating), **A**ctionable (agreed, attainable), **R**ealistic (reasonable, relevant, resources, results-based), **T**ime Sensitive (time-based, time/cost limited, timely).
- **Pathways to Success** – These are critical functional areas of an organization that must be strong to accomplish its Mission, Vision, Goals, and Objectives. It is a Systems / Holistic Approach to SP where each Pathway will have a Goal

and SMART Objectives. The reason for only five Pathways is to create a manageable number of focus areas that make the most difference in an organizations success. If these focus areas or Pathways account for 80% of the difference between success and failure, then there is no need to spend energy on the remaining 20%. The five Pathways are:

1. **Administrative** – Functions including IT, HR, Accounting, Compliance and Quality Improvement, Outcomes Reporting, Facilities, Grants, and Fundraising. If this area is not strong, staff become frustrated and demoralized.
2. **Brand** - Our reputation and image among stakeholders. This includes the impact from advertising, COTS website, social media, customer service, and other factors. As our reputation continues to improve, so does our ability to attract higher funding which results in higher agency value.
3. **People and Culture** – Values and behaviors that contribute to the social and psychological environment of an organization. This is also about leadership, management and staff talent, technical know-how, and professional and program expertise. Everything starts with having the right people. The better the talent, the more confidence clients will have in experiencing the services. Funders will also be confident and therefore likely to support the programs. If “people are your best asset,” this area must be strong.
4. **Financial Sustainability** – creating strong and multiple sources of revenue to support programs and administration. This includes government grants, donations and contributions, earnings on cash reserves, endowments and bequests, program fees, social enterprises. This is also about financial planning and forecasting, budgeting, financial reporting, and internal controls.
5. **Social Impact** - Building strong programs in our core service areas. Value is provided to the clients served by having trained and experienced staff; focused efforts that have maximum client and community impact; and properly tracking the outcomes and work performed. Innovation, creativity, and a performance review process are critical to ensure that the programs are constantly relevant. This Pathway also includes building strong partnership and alliances in the community so COTS can refer clients in the event they do not provide a specific service.

- **Communication** – The communications strategy is crucial in effectively deploying the SP and the direction of the agency. Simple is better, so the SP should be memorable, achievable, inspiring, and to get buy-in, the elements of a SP should be simple. People won't support a plan that is long, confusing, and difficult to remember. The SP is intended for internal and external stakeholders - staff and board of directors, and parts of the plan will be posted on our website and included in grant applications.

Our Process to Create the Strategic Plan (SP)

- ❖ The process used to create this Strategic Plan was simple, inclusive, and over a brief time period. We convened a workgroup of 13 people – six board members and seven staff from various levels of COTS. They included:
 1. John Baxter – Board Treasurer
 2. Jamieson Bunn – Director of Development
 3. Chuck Fernandez – Chief Executive Officer
 4. Bill Gabbert – Board President
 5. Andy Guarino – Grants Manager
 6. Ben Leroi – Board Vice-President
 7. Eileen Morris – Client Enrichment Manager
 8. Jules Pelican – Director of Programs
 9. Andrea Pfeiffer – Board member
 10. Mike Resch – Board member
 11. Debbie Robbins – Housing Case Manager
 12. John Souza – Site Coordinator
 13. Judy Tuhtan – Board member; past Board President, Vice-President, Secretary, Treasurer

- ❖ We started the process in mid-July 2020 and ended by Thanksgiving 2020. We met twice monthly for one hour. Each month, we updated the Board of Directors on our progress.

- ❖ We divided the SP Update process into four phases:
 - Phase 1 – Assessment. This included creating a SWOT Analysis (see attached).

 - Phase 2 – Design. This included a review of the Mission, Vision, and Values Statements and laid the foundation for a systems approach to strategic plan.

 - Phase 3 – Build. This is where we created Goals and SMART Objectives to support each Pathway for Success.

 - Phase 4 – Manage. This is where we implement the Plan and monitor monthly and quarterly to ensure successful implementation, outcomes, and course corrections if needed.

- ❖ Each meeting was facilitated, agendaized, and with formal minutes taken. Different board and staff members helped to lead discussions in each of the different phases to increase participation and buy-in. Before each meeting, material (readings, video's) were sent to the group to help familiarize them

with the upcoming Phases to be addressed.

- ❖ As strategy should drive the budget, the Goals and Objectives will be updated annually and as part of the annual operating budget process.