

Building Our Future, Together

Strategic Plan

2019 - 2022

Pajaro Valley Shelter Services

Self-Empowerment • Dignity • Compassion



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*Click *here* to access the APPENDICES on PVSS' website.

EXECUTIVE SUMMARY



Pajaro Valley Shelter Services (PVSS) provides families with a path to stable, self-sufficient futures through short- and longer-term housing and supportive services. PVSS operates a mixed housing model in order to meet the diverse needs of families in the community:

- 90-Day Emergency Shelter for women and children;
- 15 Units of 1- to 2-Year Transitional Housing for single- and two-parent households; and
- 6 Units of Long-term Affordable Housing for single- and two-parent households.

The development of a Strategic Plan became a high priority for the 35-year-old organization, because affordable housing has emerged as a critical gap for the community in the Pajaro Valley; the number of families on PVSS' waiting lists is between 30 to 60 at any given time; and the uncertainty of government funding streams has necessitated a transition to individual, private fundraising sources.

The planning process took place from August 2018 through March 2019 and involved a wide variety of stakeholders in the community. The process included an environmental scan; a capacity assessment; stakeholder engagement via online surveys and in-person interviews; a revision of the Mission, Vision and Values; a SWOT analysis; and goal setting and action planning.

Through the process, it became clear that the most pressing issue facing the organization was the need for capacity development. Seven years ago, PVSS adopted a programmatic shift that expanded its capacity to serve more families, yet staffing levels have remained fairly static since the early 1990s. In May 2018, the organization also acquired the last two of its 22 properties. The expansion in number of clients served has not been matched in capacity-building efforts, which has predictably compromised depth in services and partnerships, the wellness of staff, and internal operations.

To address these needs, PVSS' Strategic Goals over the next three years are the following:

- 1. Board Development:** Develop the Board of Directors into a strategic, effective, and self-sustaining board
- 2. Fund Development for Sustainability:** Increase the annual revenue from contributed private income by \$235,000- \$300,000
- 3. Program Development:** Update the program model and policies for both the use of PVSS' properties and the provision of supportive services
- 4. Resource Development:** Increase staff by 3.5-4.0 FTEs and the office space needed to accommodate them in the areas of operations management, fund development coordination, case management, program administrative support, and property management
- 5. Systems Improvement for Efficiency, Effectiveness and Empowerment of Staff:** Develop effective internal systems impacting staff roles and structure; decision-making processes; staff evaluations; data management and program evaluation; communications; and staff training and professional development.

HISTORY

1983 - 2019



October 31, 1983

The Pajaro Valley Shelter for Women and Children opens at 27 Sudden Street. This house is now the Pajaro Valley Arts Council.



*Sister Marie Veronica Wagner, Ann Veronica Coyle & Sister Susan Olson**
Co-Founders



April 1984

The Shelter moves to 115 Brennan Street, thanks to George Wagner and the Cowell Foundation.

Summer 1988

PVSS purchases the duplex at 26 Sudden Street for Transitional Housing - marking the first of this type of program in the country.



May 1984

The 1st Mother's Day Run for Shelter raises \$8,000.

October 1989

The Loma Prieta Earthquake occurs in Northern California.



Summer 1990 - Spring 1991

PVSS acquires seven units of Transitional Housing with earthquake recovery funds to house earthquake survivors and manages five other homes for survivors. Habitat for Humanity completes a third unit at 26 Sudden Street, bringing the total number of Transitional Housing units to 15.



Fall 1997 - September 2001

PVSS successfully completes a \$1 million Endowment campaign. Dick and Mary Solari, the David & Lucile Packard Foundation, and the Frank & Zoe Ann Orr Trust make challenge grants to inspire PVSS' community of supporters.



*We are grateful for Sister Susan Olson' and AV Coyle's significant contributions to the Strategic Planning effort.

(continued from September 2001)



May 2002

The 18th Annual Mother's Day Run/Walk for Shelter raises a record Through dialogue the participants

January 2005
21 program alumni families from the Transitional Housing Program and Emergency Shelter have purchased their own homes.



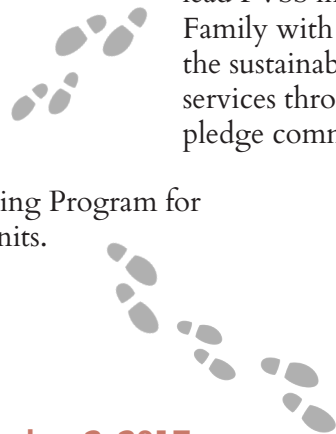
2008

Diane Cooley and Mary Solari lead PVSS in building the Circles Family with an aim to support the sustainability of PVSS' services through three-year pledge commitments.



September 2010

The Long-term Affordable Housing Program for families begins in four housing units.



November 2, 2017

PVSS holds the inaugural *Shelter to Home* Fall Benefit Dinner & Silent Auction and you raise \$37,500 for sustainability!

December 2017

For the first time ever, PVSS participates in both *Santa Cruz Gives!* and *Monterey County Gives!* online holiday campaigns. 80 to 90% of our clients are from Santa Cruz County and 5 to 10% are from Monterey County.

**BUILDING BRIDGES TO SELF-SUFFICIENCY
BUILDING BRIDGES BETWEEN PEOPLE
BUILDING BRIDGES BETWEEN COUNTIES**



May 13, 2018

Mother's Day Run/Walk for Shelter raises a record \$75,000.



May 24, 2018

PVSS purchases two Long-term Affordable Housing units in Pajaro, Monterey County, with a grant from the Borina Foundation.

July 2017 - June 2018

14 client households reunite with their children.

VISION, MISSION, VALUES

Strategic Action for Transformational and Sustainable Change



©Monica Sharma

35 years of intergenerational interventions for strong families

7,500 program alumni

38 program alum families have purchased their own homes

Our Vision

We envision a community where families have safe, secure and stable housing with sufficient resources and space to plan for their futures and pursue happiness.

Our Mission

Providing families with a path to stable, self-sufficiency futures through short- and longer-term housing and supportive services.

Our Values

We strive to embody our values in everything we do and in all of our relationships with clients, team members, partners, and the broader community.

Self-Empowerment

Our clients achieve their own success through commitment to accomplishing their goals. We support and accompany families on their path to self-sufficient futures by providing knowledge, skills, and connections to community resources. We assure the sustainability of our programs through accountability to our community.

Dignity

We recognize the inherent potential of families to overcome challenges and build a better future for themselves. We believe that the primary decision-making role belongs to our clients, and we honor that role. We work with a deep sense of mission, and we honor and respect our team's efforts in reaching organizational goals.

Compassion

We care deeply for families and children experiencing homelessness in our community. We are moved to action and determined to inspire and motivate our community to join us.

PROGRAMS

Building the Path to Stable, Self-Sufficient Futures



SELF-SUFFICIENCY

Supportive Services as the Bricks



Housing as the Foundation

22

housing units

136

beds



Emergency Shelter x1



1- to 2-year Transitional Housing x 15



Long-term Housing x 6



PROGRAMS

Housing: The Foundation to Self-Sufficiency

As a first step in helping families achieve safety and stability, PVSS provides housing to families experiencing homelessness.

PVSS has 22 housing units in Watsonville, Santa Cruz County, and Pajaro, Monterey County: one 90-day Emergency Shelter (dormitory style), two one-year Transitional Housing units totalling eight bedrooms (one family per room), 13 two-year Transitional Housing units (individual family homes), and 6 Long-term Affordable Housing units.



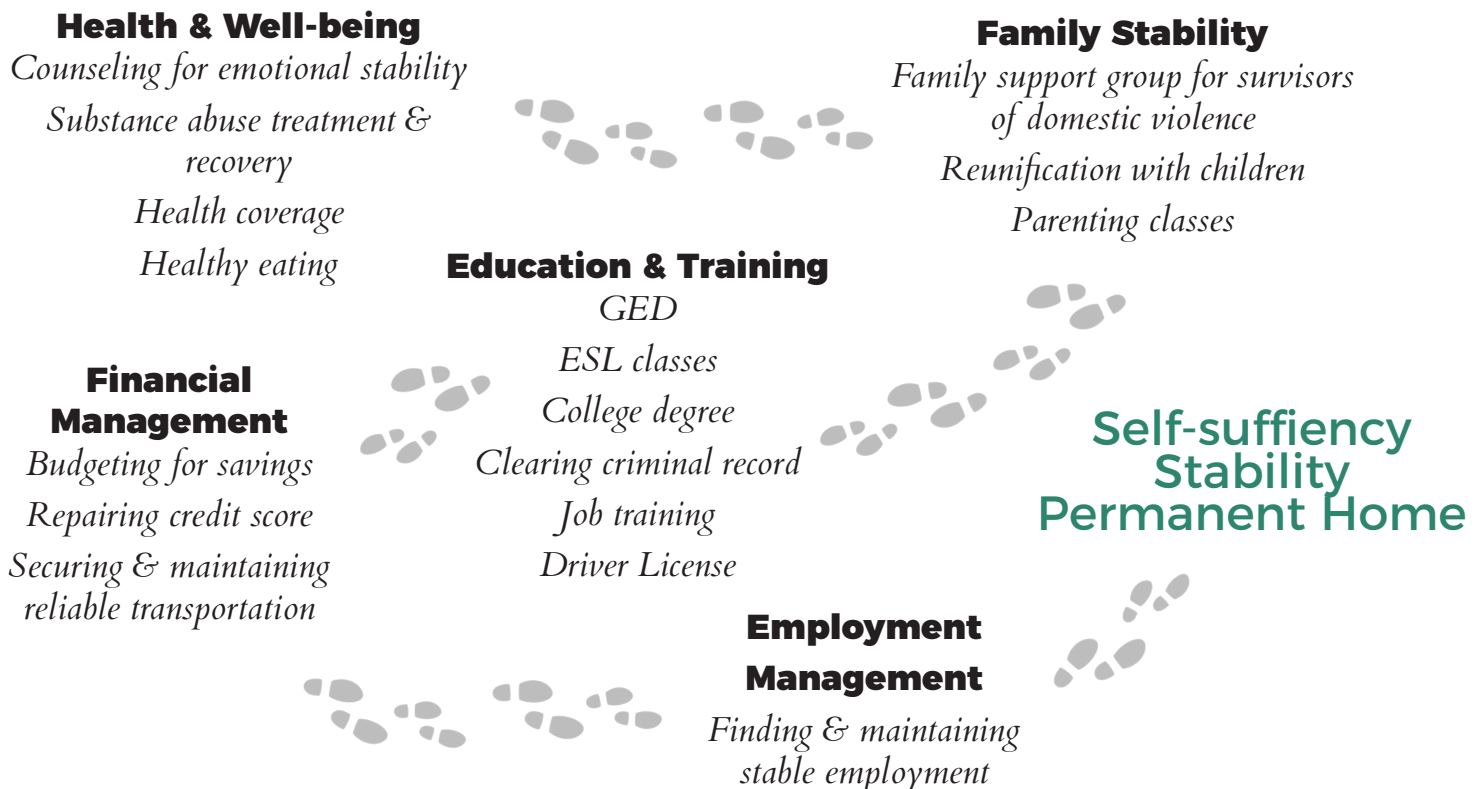
PROGRAMS

Supportive Services: The Bricks to Building Self-Sufficiency

PVSS provides strength-based, bilingual, and culturally-sensitive case management. Within the framework of supportive services, families identify barriers to self-sufficiency, set goals of improved personal and economic self-sufficiency, and develop the skills necessary to unveil their full potential as community members. The supportive services include regular one-on-one consultations to support families in gaining emotional, family, and employment stability, as well as monthly financial consultations to support families in saving money and gaining financial literacy. Families attend classes and workshops on parenting, money management, self-care, nutrition, job search skills, and property maintenance, among many.

All client families set five self-sufficiency goals and strive to meet at least three of them with the support of the case management staff prior to graduating from PVSS' programs. PVSS has achieved an 85% success rate for families who graduate from the one- and two-year Transitional Housing to stable housing with savings, and a 65% success rate for families graduating from the Emergency Shelter.

From Small Goals to Big Goals*, Families Work Hard on the Path to Self-sufficiency!



*The goals highlighted here are actual goals on which clients are working on during FY 2018-2019.

STRATEGIC PLANNING PROCESS

Context

The development of a Strategic Plan became a high priority for PVSS, due to the following realities:

- Affordable housing has emerged as a critical gap for the community in the Pajaro Valley;
- The number of families on PVSS' waiting lists is between 30 to 60 at any given time;
- The uncertainty of government funding streams has necessitated a transition to individual, private fundraising sources; and
- The recent acquisition of two units of Long-term Affordable Housing marks the maximum capital expansion that PVSS can undertake without committing to an overarching strategy for sustainable growth.

At the first Steering Committee meeting, the group identified objectives for the planning process:

- Establishing a vision of the future (3-5 years);
- Clarifying the mission and activities of the organization;
- Creating a long-term vision for sustainability planning to replace exclusively annual planning;
- Exploring opportunities for building on PVSS' current foundation, while strengthening current activities;
- Defining PVSS' role in the homeless services sector today and into the future;
- Supporting diversity and inclusion, which are organizational core priorities, by bridging clients with additional community resources, building awareness around transitional family homelessness, and addressing the stigma attached to homelessness; and
- Informing decision-making around adopting a "Housing First" approach in one or more of PVSS' programs, as well as around converting Long-term Housing into Transitional Housing, or vice versa.



On May 24th, 2018, Pajaro Valley Shelter Services purchased two Long-term Affordable Housing units in Pajaro, Monterey County, with a grant from the Borina Foundation. The acquisition marks the maximum capital expansion that PVSS can undertake without committing to an overarching strategy for sustainable growth.

Critical Questions

As part of determining the framework for the planning, the Steering Committee identified the following critical questions to answer through the process in relative order, recognizing that some processes may overlap:

1. What is the need in the community?
2. Where are the gaps in community services/efforts?
3. Who is PVSS?
4. What needs should PVSS meet? What role will PVSS play?

Strategic Questions

In addition, executive staff identified three main strategic questions facing the organization, with sub-questions under each.

1. How will PVSS build capacity to reach a sustainable service maintenance and expansion pattern?

- a. How will PVSS build capacity to ensure appropriate workloads for staff and board?
- b. How will PVSS build capacity for sustainable capital expansion (office space & housing)?
- c. How will PVSS improve its internal policies, procedures, and structures for staff & board?
- d. How will PVSS build capacity to reach sustainable fundraising growth?

2. Which housing types will PVSS provide to families in the future in order to improve housing affordability in the region?

- a. Will PVSS convert its Long-term Affordable Housing into Transitional Housing? If full conversion is deemed incongruous with improved affordability, will PVSS place a time limit on Long-term Affordable Housing?
- b. Will PVSS continue to operate the Emergency Shelter according to the current guidelines or will PVSS adopt a Rapid Re-housing model to which federal requirements apply?
- c. What data will inform PVSS' service model?

3. Will PVSS maintain and grow its financial autonomy or will PVSS seek to meet requirements for government funding?

- a. Will PVSS continue to serve families in situations of transitional homelessness and/or will PVSS seek to adhere to Continuum of Care chronic homelessness priorities?
- b. Will PVSS grow its private partnerships, such as partnerships with private affordable housing developers, and/or its public partnerships?

While the first question was more of an internal question, the stakeholder engagement process provided a unique opportunity to obtain input on the housing and funding questions (second and third questions).

STRATEGIC PLANNING PROCESS

Overview

From the project's inception expressed in the Request for Proposals for a Strategic Planning consultant, PVSS prioritized the development of a strategic work plan rooted in collaboration with PVSS' community partners, current clients and program alumni, nonprofit service providers, businesses, and government. PVSS also prioritized an actionable plan, with a timetable of implementation with specific measurable benchmarks, objectives, and tasks to be accomplished to achieve goals, as well as clear evaluation methodology for how to measure organizational and strategic effectiveness, impact, and success.

In August 2018, PVSS kicked off the Strategic Planning process with the formation of the Strategic Planning Steering Committee. The Steering Committee created the framework for the process and reached consensus on developing a three-year Strategic Plan. This timeframe accounts for the internal and external influences that impact the organization, including the fact that while government funding requires long-term planning, the funding landscape changes frequently, as well as the leadership cycles within the organization (such as the three-year board terms).

The Development Director drove the process from the staff side, with partnership from the Executive Director. The staff, board, and community members were engaged in the process to varying degrees, with much of the consensus-driven work occurring through the Steering Committee and two full-day retreats.

Major Phases

- 1. Environmental Scan:** Collecting data on community needs, root causes of homelessness, services available, gaps in services, and trends in the field.
- 2. Mission, Vision, Values Retreat:** The first retreat was held on November 17th, 2018, with board, staff, and community stakeholders present. It was focused on these critical questions: "Who are we?" "How does our environment look, inside and out?" and "What is our current capacity?"
- 3. Capacity Assessment:** A series of special sessions were held with staff to analyze, document, and address internal capacity challenges. The assessment included an analysis of program operations, the creation of a work breakdown structure for each department, and a prioritization exercise targeting job tasks.
- 4. Stakeholder Engagement:** Between retreats, the stakeholder engagement was executed to gather information and feedback from internal and external groups (Section IV. C. Stakeholder Engagement).

5. “Housing First” Discussion: Extensive data about the “Housing First” philosophy and program strategies were collected and analyzed with the objective of informing the answer to the question of whether PVSS should adopt a “Housing First” program strategy in one or more of its programs or properties? The topic was discussed at length in a joint session with the Board of Directors and Steering Committee (Section IV. E. Housing First).

6. Goal and Action Planning Retreat: The second retreat was held on March 2nd, 2019, with board, staff, and community stakeholders present. As the culmination of the work of the previous months, this retreat focused on reviewing the data from the stakeholder engagement process, determining the 5 key strategic focus areas and developing S.M.A.R.T. goals, and creating action plans for the first fifteen months.

Steering Committee

The Steering Committee consisted of two staff members, three board members, three community stakeholders, and the Strategic Planning consultant. The Committee met twice monthly from September 2018 through March 2019, overseeing the Strategic Plan development, while designing, managing, and executing the different phases in the the 7-month process.



Goal and Action Planning Retreat in March 2019

Pictured, from left to right: Laura Solis (staff), Uriel Reyes (board), Teresa Ronse (Steering Committee), Annette Melendrez (staff), Jimmy Dutra (board), Jane Barr (board), AV Coyle (co-founder and volunteer), Jordan Thorpe (board & Steering Committee), Jamie Serrano (staff), Andrew Wulf (board & Steering Committee), Perla Villegas (staff), Kimberly Ferm (staff & Steering Committee), Julie Conway (housing expert), Noeli Perez (staff), Gina Swan (LMFT), Judy Sambrailo (staff), Oana Alexan (staff & Steering Committee)

STRATEGIC PLANNING PROCESS

Stakeholder Engagement

“Through dialogue the participants emerge with a much clearer understanding of the way change happens in the context, and the range of strategic options that are open to the organization – and to the other actors in the system.”
Keystone Accountability

Key Informant Interviews and Focus Group

Inquiry: input on the previously identified Strategic Questions (Appendix D)

Sectors: expertise around housing and/or homeless services, unique perspective on community investment in the nonprofit sector

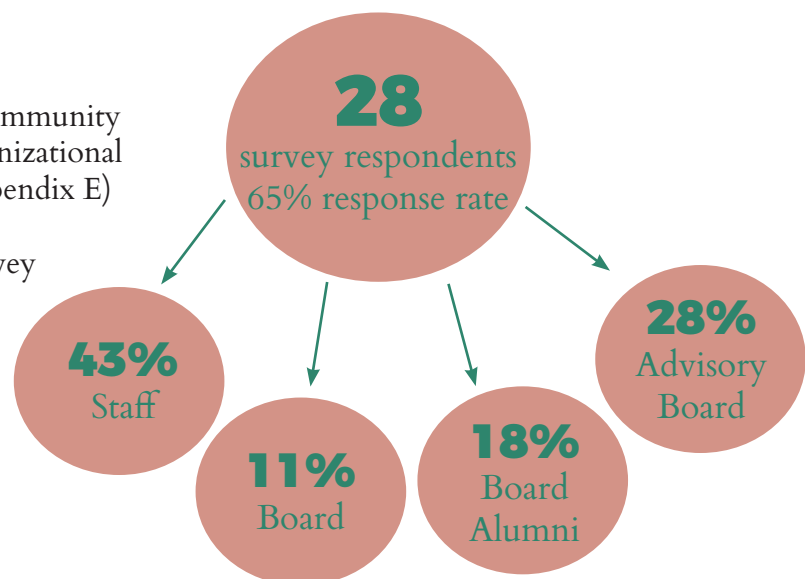
Method: anonymous consultant-led interviews and focus group



Internal

Inquiry: assessment of gaps in community services; internal challenges; organizational capacity; and strategic issues (Appendix E)

Method: anonymous online survey

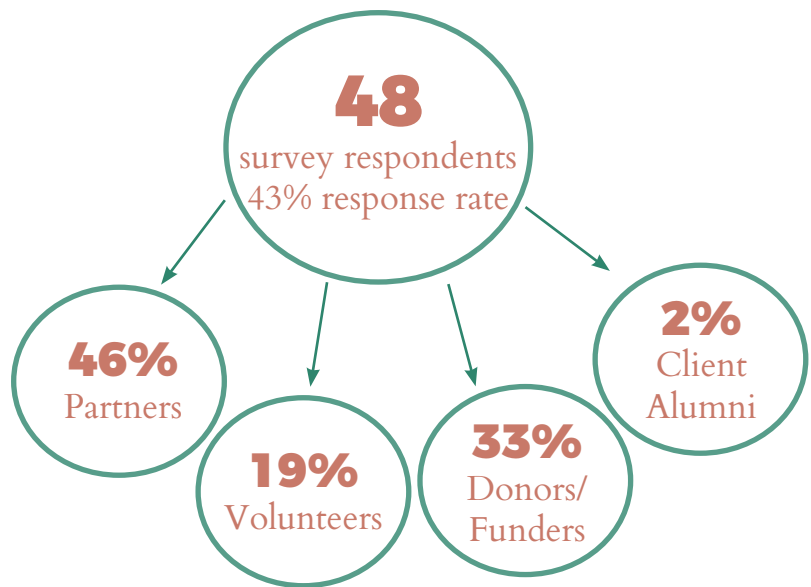


External Surveys

Inquiry: feedback on PVSS' strengths, challenges, opportunities, and threats; strategic issues; and motivations for supporting PVSS. (Appendix E)

Sectors: agriculture, government, faith-based, case management, social services, homeless services, real estate, property management, and healthcare

Method: anonymous online survey



Informational Interviews

The Steering Committee members executed informational interviews with individuals that could provide particular insight into questions of interest. These interviews were not designed to be anonymous, but rather to provide valuable information in particular areas:

- agricultural industry housing trends (2 experts);
- potential partnerships with healthcare organizations (3 experts);
- client input on the feasibility of placing a time limit on PVSS' long-term affordable housing (6 client families); and
- model homeless services organization operating a self-sufficiency framework with families

Retreats

#1 Mission, Vision, Values Retreat

"Who are we?"
 "How does our environment look, inside and out?"
 "What is our current capacity?"

18 participants:
 4 board members
 9 staff members
 5 external stakeholders

#2 Goal & Action Planning Retreat

Stakeholder Engagement Data Analysis
 5 Key Strategic Focus Areas Identification
 S.M.A.R.T Goal-Setting
 Action Planning

18 participants:
 5 board members
 9 staff members
 4 external stakeholders

ENVIRONMENTAL SCAN

“In nature everything works in collaboration. There are hummingbirds and flowers that are in such deep coordination they need each other for survival. How vibrant and alive and successful could our movement be if we moved with such coordination and collaboration?”

Karissa Lewis

Based on the *2017 Santa Cruz County Point-in-Time Count and Survey*, it is estimated that Santa Cruz County has 2,249 individuals experiencing homelessness, a 14.5% increase from the 2015 count (1,964 individuals). Of these, 403 individuals identified as part of 129 families in situations of homelessness. *The Santa Cruz County Community Strategic Plan to Prevent, Reduce, and Eventually End Homelessness* indicates that the majority of the families experiencing homelessness in Santa Cruz County are in South County (including Watsonville).

The County Office of Education provides additional data on “hidden” homelessness affecting students, using the more expansive definition of homelessness used by schools under the *McKinney-Vento Act*: there are 2,881 students living in “doubled-up” situations, where they are sharing a residence with an additional family. Santa Cruz County’s Strategic Plan on Homelessness indicates that South County is “particularly beset with overcrowded, substandard housing.”

PVSS’ primary geographic focus is the Pajaro Valley, which encompasses Southern Santa Cruz County and Northern Monterey County. Communities in the Pajaro Valley have been traditionally underserved due to their distance from both counties’ seats, relative poverty, racial and ethnic disparities, and a largely agricultural economy relying on seasonal work.

Homelessness is present in all parts of Santa Cruz County. The data from the 2017 Project Homeless Connect events held in *Watsonville* and *Santa Cruz* offers a snapshot into the higher concentration of families, as well as children under the age of 18, in South County (Watsonville) relative to Santa Cruz.

- Age of Clients Watsonville: 41% under the age of 18 & 47% between 25 and 64 years of age
- Age of Clients Santa Cruz: 41% under the age of 18 & 47% between 25 and 64 years of age
- Adults (18+) with Children in Watsonville: 32% (yes), 68% (no)
- Adults (18+) with Children in Santa Cruz: 9% (yes), 91% (no)

PVSS IS UNIQUE IN MEETING A CLEARLY IDENTIFIED COMMUNITY NEED:
In serving families with children, PVSS addresses a concrete need in South County. PVSS is the only organization in the Pajaro Valley that offers Emergency Shelter and Transitional Housing to families with children affected by homelessness.

Santa Cruz County’s Strategic Plan on Homelessness shows that 72% of the population experiencing homelessness is in situations of transitional homelessness and 28%, in *chronic homelessness*. The primary cause of homelessness is often difficult to pinpoint, as it is usually the result of multiple and compounding causes. Causes include job loss; insufficient income from jobs and public supports to afford living expenses; lack of health insurance; discharges from jails and other institutions; poor credit or rental history; lack of mental health and addiction treatment services; and family violence and relationship problems. The Plan identifies a gap in supportive services to help people cope with the personal, family, economic, and health challenges often interlinked with homelessness.

PVSS’ THEORY OF CHANGE ADDRESSES THE ROOT CAUSES OF HOMELESSNESS: The programmatic foundation of PVSS’ services facilitates a self-sufficiency-driven approach to moving beyond homelessness. PVSS’ supportive services help promote residential stability, increased skill level or income, and greater self-determination. Not only does PVSS work with each family on ensuring that they graduate into permanent sustainable housing, but also, upon graduation, families have developed the self-confidence in their ability to sustain their successes in the long-term.

As outlined above, the causes of homelessness vary. In the Pajaro Valley, the main reason families experience homelessness is because they cannot find housing they can afford. Many data sources refer to the scarcity of affordable housing in the region, which makes affordable housing development the transformational solution to homelessness here. In our data collection process, we identified various efforts to increase the stock of affordable housing in the Monterey Bay, and *Monterey Bay Economic Partnership’s White Paper* provides a compelling overview of policy changes that would improve housing affordability.

PVSS has a unique advantage in that it owns 22 properties. Seven years ago, this advantage meant that PVSS had the autonomy to convert two of its 2-Year Transitional Housing units (individual family homes) into 1-Year Shared Transitional Housing (shared living, 8 bedrooms) – expanding its capacity to serve up to 8 families at a time, including single fathers with children and boys over the age of 12.

PVSS FILLS A CLEARLY IDENTIFIED GAP IN COMMUNITY RESOURCES: In a housing market defined by scarcity and unaffordability, PVSS offers three solutions for families in diverse situations of homelessness: Emergency Shelter, Transitional Housing, and Long-term Housing. PVSS works mindfully with client families on moving them to permanent housing.

In the past decade, a significant shift has developed, away from shelter and transitional housing strategies toward prevention and “Housing First” approaches, which prioritize rapid placement and stabilization in permanent housing that does not have service participation requirements or preconditions (such as sobriety or a minimum income threshold).

Although Transitional Housing is less cost-effective than “Housing First” initiatives, permanent supportive housing and rapid re-housing, it has been proven to provide life-changing benefits to families. The ICPH’s overview of *Federal Homelessness Policy* indicates that “[l]onger stays in transitional housing enabled families to develop the skills necessary for self-sufficiency and were associated with higher educational attainment and employment rates, greater likelihood of consistent work during the year after program exit, greater likelihood of having one’s own residence during this time, and better mental health among children one year after move-out.”

PVSS CONSIDERS “HOUSING FIRST” STRATEGIES: Santa Cruz County’s Strategic Plan on Homelessness identifies a need to more widely implement “Housing First.” PVSS occupies an important role in the County’s Continuum of Care, and a formal consideration of whether to adopt a “Housing First” approach in one or more of its programs is a logical next step.

Board and Steering Committee Joint Session

Prior to the final retreat, PVSS held a joint session with the Board of Directors and Steering Committee to discuss two critical questions:

- Will PVSS modify one or more of its programs to fit the “Housing First” philosophy/strategies or not?
- Will PVSS change any or all of its Long-term Housing into Transitional Housing?

The group analyzed the data collected on “Housing First,” in particular “*Organizational Change: Adopting a Housing First Approach*,” 5-year PVSS program outcomes (Appendix G and Appendix H), as well as the “Housing First” program scenarios at PVSS (Appendix I).

The group decided against adopting a “Housing First” approach in one or more of PVSS’ programs for a variety of reasons. Approximately half felt that implementing “Housing First” strategies was not in alignment with PVSS’ Mission and Values, in part due to the fact that it may require PVSS to serve more families outside of Watsonville. The stakeholder input was very clear in communicating that PVSS meets an important need in the Pajaro Valley and provides a unique service to this community. Additional reasons included (1) lack of clarity on whether the cost benefit analysis was positive, (2) insufficient information at the time of decision-making, such as budget projections, and (3) the capacity challenges facing the organization not being conducive to significant organizational change.

In response to the second question, the group felt that the question required further investigation. In addition to the question of whether to change any or all of PVSS’ Long-term Housing into Transitional Housing, there were broader questions about rent policies, timeframes, and services. The Program Development strategic focus area aims to address this matter.

STRENGTHS & CHALLENGES

The Internal Environment

Strengths: How is PVSS unique?

Top distinguishing factors of the organization:

- Providing a unique service in the Pajaro Valley;
- Program model that supports families achieving self-sufficiency;
- Deep impact on the lives of clients;
- Focus of the Mission on helping families; and
- Ownership of 22 properties.

Additional strengths include the commitment and passion of staff and board to the Mission, stellar reputation, historical ties to the community, and multicultural and multilingual staff.

Challenges: Where may PVSS be vulnerable?

- Staff capacity to provide greater depth in service delivery, focus on program and organizational development and evaluation, and have manageable workloads
- Operating below capacity for extended period of time, leading to burnout and low morale
- Ability to pay competitive salaries
- Size and capacity of Board of Directors
- Limited office space, compromising effective work space
- Outdated equipment and technology
- Community need exceeding the organization's capacity to meet it
- Strategic evaluation of program design and policies for greatest impact in alignment with Mission
- Internal infrastructure in the areas of policies and procedures, organizational structure, communications, data management, evaluation, and HR
- Fundraising capacity to meet organizational needs
- Inconsistent priorities among stakeholders

OPPORTUNITIES & THREATS

The External Environment

Opportunities: What can PVSS leverage for its advantage?

- Potential housing development policy changes that could make it easier to build and add Accessory Dwelling Units to existing properties
- State grant opportunities for shelters (operational and capital funds)
- Bridging communities within Pajaro Valley (e.g. diversity, business, clients, program alumni)
- Health care system as a potential source of funding
- Obtaining place-based vouchers for long-term housing units
- Awareness-building addressing the stigmatization of homelessness
- There are many possibilities for increased partnerships that would require increased staff capacity, including, but not limited to the following:
 - Deeper partnerships with existing organizations that share clients
 - Partnering with landlords to move clients into permanent housing
 - Partnering with Mid-Peninsula to have them set aside units for families impacted by Domestic Violence, with PVSS providing the supportive services
 - Partnering with Watsonville churches that have land and are interested in mission-driven work around affordable housing (e.g. church provides land and/or supports development and PVSS provides supportive services)
 - Partnering with private housing developers that are required to have affordable housing units (e.g. PVSS provides supportive services, holds a master lease, operates units or buys the units at a lower rate - which may be a win-win partnerships for developers who want to complete their projects, as PVSS would provide political capital for the project and marketing to market-rate purchasers)

Threats: What actions can PVSS take to mitigate risks?

- Economic downturn, instability of government funding, loss of donors
 - Increase fundraising capacity to grow the number of individual donors, multi-year pledges, monthly giving, and other revenue sources
- Housing crisis, increased homelessness rates
 - Develop capacity of the organization for eventual expansion of services, while exploring creative partnerships to increase the affordable housing stock in Pajaro Valley

CAPACITY ASSESSMENT

“What are our intentions, informed by our vision? What do we need to be and do to bring our vision to pass? How do we bring those intentions to life throughout every change, in every aspect of our work?”

Adrienne Maree Brown

Early in the Strategic Planning process, it became clear that the need for capacity development was the core issue facing the organization. Seven years ago, PVSS adopted a programmatic shift that expanded its capacity to serve more families, requiring more case management and program administration. However, staffing levels have remained fairly static since the early 1990s. PVSS acquired the last two of its twenty-two properties in May 2018, a very unique asset for a relatively small community-based nonprofit. The expansion in properties and the number of clients served has not been matched in capacity-building efforts, which has predictably compromised depth in services and partnerships, the wellness of staff, and infrastructure development. Currently, PVSS’ staffing levels are not sustainable with the amount of services and the number of clients served.

To get a deeper understanding of the staffing level challenges, a series of special working sessions were held with staff to analyze, document, and address capacity:

- an analysis of program operations,
- the creation of work breakdown structures for each department, and
- a prioritization of job tasks.

Initially, Celia Organista, a retired nonprofit executive and Strategic Planning Steering Committee Member, provided a capacity report to various internal stakeholders at a variety of meetings. Celia acted as Interim Executive Director of PVSS in August 2018 to allow current Executive Director Kimberly Ferm a much-deserved vacation. ED Kimberly Ferm capitalized on Celia’s years of nonprofit management expertise by asking her to meet with all staff individually to discuss internal challenges. The resulting report was provided at a Steering Committee meeting; the first Mission, Vision, Values Retreat; and individually to board members not in attendance. In summary, the report noted the staff exhibited commitment, care for clients and community, a love of PVSS, and a hunger for learning and growing. Challenges that were consistently expressed included inadequate communication, a lack of follow-through, lack of clarity about lines of authority, supervision and decision-making challenges, difficulties with focus, and poor change management.

Recommendations included establishing clarity on each person’s authority (decision-making power and supervision), conducting a time study to document how each staff member is spending her time, staff support time with LMFT Gina Swan, and allowing staff time to prepare for and adjust to changes. Celia noted a need for specific staff training in the areas of confidentiality, safety, and self-care, as well as a number of program policy considerations. Ultimately, her conclusion was that every department needs more staff for programmatic consistency, depth, and continuity.

A subset of staff worked on an analysis of program operations, looking at what is and is not working, what is needed for the future, and the barriers to time efficiency (Appendix J). Part of the result of this work included a forecast for the additional staffing needed to get PVSS to a level of sustainable operations.

Strategic Planning Consultant Paula Harris led the staff through an exercise to document the work in each of the major areas of operations, as foundational work to support an analysis of job tasks and prioritization. As part of this process, staff did an initial documentation of the tasks that are chronically sacrificed due to staffing levels (Appendix K). In a subsequent workshop facilitated by Celia Organista and Board Member Jane Barr, staff members used the priority matrix to classify their job tasks by importance/impact and level of effort. This analysis will be used to increase efficiency and effectiveness for each staff member.

PAJARO VALLEY SHELTER SERVICES					
Housing	Case Management	Administrative Operations	Supportive Services	External Engagement	Program Administration
Project Management	Project Management	General Admin	Project Management	Project Management	Project Management
Shelter	Shelter	Volunteer Management	Workshops/ Field Trips	Community Outreach	Referrals
Annex	Annex	Finances	Holiday Programs	Events	Information
Transitional Housing	Transitional Housing	Fund Development	Pulguita	Collaboratives	Data Management
Long-term Housing	Long-term Housing	Board Mng't	Aftercare	Other	
Donation Coordination	Aftercare	Partnerships	Donation Coordination	Other	
Housing Development	Outreach	Strategy			
		I.T.			
		HR			

“Work Breakdown” Exercise

This information was synthesized and presented at the Goal and Action Planning Retreat, where the group identified the following key needs:

Key Needs

- Increase funding stability
- Increase funding to support capacity building
- Ensure staff empowerment
- Improve communications, trust, and clarity
- Streamline of processes
- Clarify lines of authority
- Update Job descriptions
- Increase staff
- Increase office space
- Increase targeted partnerships
- Develop the Board of Directors



2019 - 2022 STRATEGIC PLAN

Focus Areas

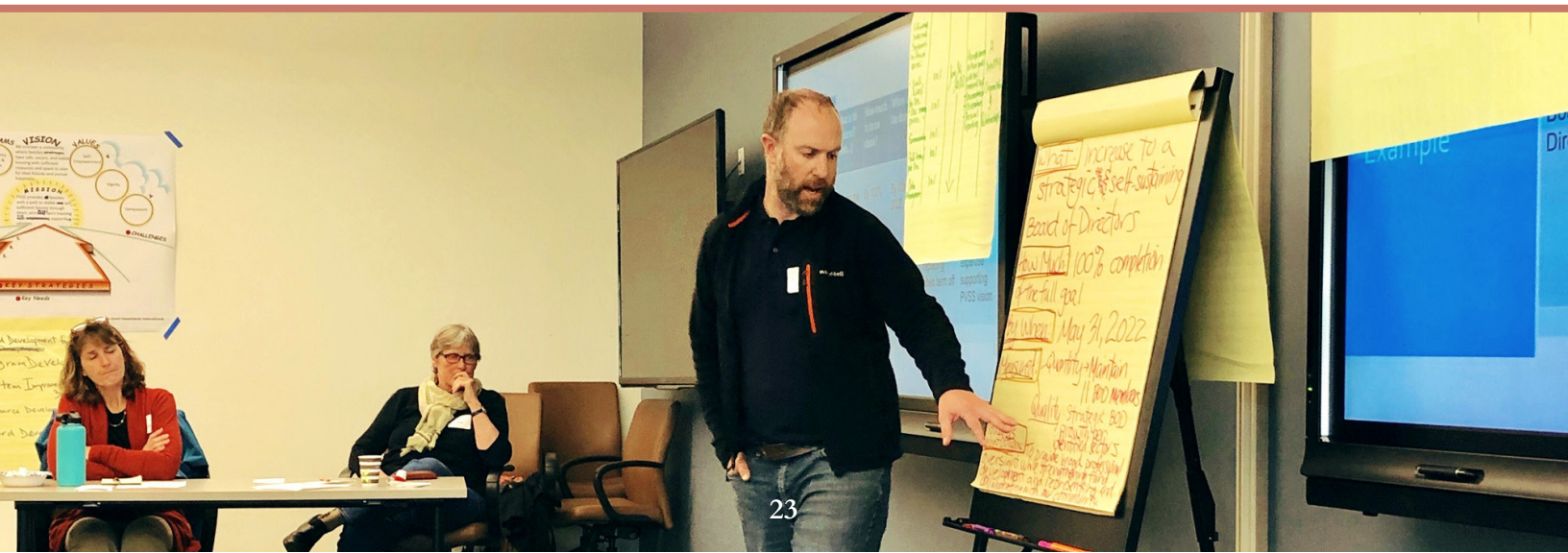
BOARD DEVELOPMENT

FUND DEVELOPMENT FOR SUSTAINABILITY

PROGRAM DEVELOPMENT

RESOURCE DEVELOPMENT (HR, Space)

SYSTEMS IMPROVEMENT FOR 3 E's (Efficiency, Effectiveness, and Empowerment of Staff)



2019 - 2022 STRATEGIC PLAN

S.M.A.R.T. Goals

“Capacity building is whatever is needed to bring a nonprofit to the next level of operational, programmatic, financial, or organizational maturity, so it may more effectively and efficiently advance its mission into the future. Capacity building is not a one-time effort to improve short-term effectiveness, but a continuous improvement strategy toward the creation of a sustainable and effective organization.”

A Network Approach to Capacity Building

BOARD DEVELOPMENT

OUTCOME: The Board of Directors is a strategic, effective, and self-sustaining board – providing broad professional oversight, while strengthening fund development and PVSS' presence in the community

INDICATORS OF SUCCESS:

By June 30th, 2022, PVSS will maintain a minimum of 11 board members that represent strategic sectors for PVSS and support the implementation of strategic goals.

YEAR ONE ACTION PLAN SUMMARY

1. Updated board policies, bylaws, and agreements
2. Board of a minimum of 11 directors in identified strategic sectors
3. Board orientation and training for effective governance, efficient fundraising, and accountability toward identified board goals



Are you interested in learning about PVSS' committed Board?

Call Executive Director Susan Olson for a chance to tour our properties and learn about our current leadership needs: 831.728.5649 x102.

FUND DEVELOPMENT

OUTCOME: PVSS will operate a strategic fund development model in order to ensure the sustainability of PVSS' services for families affected by homelessness in the community.

INDICATORS OF SUCCESS:

PVSS will increase the annual revenue from contributed private income by \$235,000 - \$300,00, increasing it each year by roughly 1/3 of the total amount. This growth will be achieved by (1) tripling the number of donors in the Circle of Giving (three-year pledge program, ranging from \$500-\$5,000/year) and Monthly Giving program, projected to raise \$200,000, as well as by (2) increasing the foundation and corporate grant revenue by 20%, projected to raise \$35,000. In total, the annual private contributions will increase from \$640,000 to between \$875,000 - \$940,000.

YEAR ONE ACTION PLAN SUMMARY

1. Fund development plan
2. Board fundraising engagement planning and implementation
3. Circle of Giving member-driven *Shelter to Home* event (ticketed or hybrid)
4. Increased sustainability giving: 10 new Circle of Giving members; 10 new monthly donors

x3 years
FOREVER IMPACT



Become a Monthly Donor

Monthly donors provide a stable source of funding to support families on their path to self-sufficiency.

\$15/MONTH

1 day of nutritious food for a family of 4

\$25/MONTH

1 case management meeting for a family

\$50/MONTH

2 nights of Emergency Shelter for a single mom and her child

\$100/MONTH

2 hours of counseling for domestic violence for a single mom

Join a Circle of Giving

Your three-year pledge will change lives for future generations.

\$500/year Ruby Circle

1,000/year Silver Circle

\$2,500/year Gold Circle

\$5,000/year Sisters Marie & Susan Circle

Are you eager to make a difference right now?

You can contribute to the sustainability of PVSS in different ways. Call Development Director Oana Alexan at 831.728.5649 x107 to learn how you can have "forever" impact or click [here](#) to donate now.

PROGRAM DEVELOPMENT

OUTCOME: To ensure that families who graduate from PVSS' programs develop the skills they need to obtain permanent housing and maintain self-sufficiency well after graduation, PVSS will pursue any program developments needed to improve outcomes for families affected by homelessness.

INDICATORS OF SUCCESS:

By June 30th, 2022, PVSS will have a clear program model and policies for both the use of properties and supportive services by (1) developing a Theory of Change model (Inputs, Outputs, Outcomes, Impact) for the Emergency Shelter; 1-Year Shared Transitional Housing (Annex to the Shelter); 2-Year Transitional Housing; and Long-Term Housing (affordable, income-based); and (2) reviewing, updating, and consolidating current program policies across all 4 programs. PVSS will also create a concrete internal Menu of Services with the resources needed to deliver them and an external Menu of Services available to families affected by homelessness in the Pajaro Valley. Success on this goal will be measured through process evaluation methods such as surveys of clients, staff, partners, etc.

YEAR ONE ACTION PLAN SUMMARY

1. Model and policies for use of properties and supportive services
2. Internal/External Menu of Services (services available to families affected by homelessness in the Pajaro Valley - northern Monterey County and all Santa Cruz County)

RESOURCE DEVELOPMENT

OUTCOME: PVSS will be at a level of sustainable operations, ensuring manageable staff workloads and high quality of services.

INDICATORS OF SUCCESS:

By June 30th, 2022, PVSS will increase staff and the office space needed to accommodate them, increasing total FTEs by 3.5-4.0 FTEs in the areas of operations management, fund development coordination, case management, program administrative support, and property management.

- Increasing the Property Management position to 1.0 FTE for a net increase of .5 FTE
- Adding a Development Coordinator position 1.0 FTE
- Adding a Program Assistant at either .5 or 1.0 FTE
- Adding a Program Director or Case Manager at 1.0 FTE

YEAR ONE ACTION PLAN SUMMARY

1. List of potential office spaces (cost included)
2. Estimate for potential renovation of Celeste Conference Room for additional office space
3. Feasibility of using 42A Brennan St. as additional office space
4. 1 FTE till June 2020 prioritization (which FTE gap should be filled in the first year of implementation)

SYSTEMS IMPROVEMENT

OUTCOME: PVSS' internal systems will operate with improved efficiency, effectiveness and staff empowerment for the sustainability of a healthy organization and healthy relationships.

INDICATORS OF SUCCESS:

By June 30th, 2022, PVSS will have effective internal systems impacting staff roles and structure, decision-making processes, staff evaluations, data management and program evaluation, communications, and staff training and professional development. The success on this goal will be measured through documentation (policies and procedures, job descriptions, organizational chart, evaluations), observation, and personal reporting.

YEAR ONE ACTION PLAN SUMMARY

1. Clear and consistent job descriptions for staff
2. Annual performance reviews of staff
3. Clearly defined internal responsibilities and processes (supervision; decision-making; work-related communications, etc.)
4. Staff development and training for effective and efficient operations
5. Updated PVSS Staff Policy Handbook
6. Effective accountability mechanisms for the Systems Improvement Goal
7. Improved data management

MONITORING PROGRESS

The Board of Directors will hold the primary responsibility of monitoring progress toward the Strategic Plan goals. Each of the 5 Strategic Focus Areas will have a Board Accountability Lead who will report on progress at monthly board meetings. Progress Reports will be included in the board packet that is sent out one week prior to the board meeting.

The Board Accountability Lead will be responsible for soliciting progress on action steps and compiling the Progress Report prior to the Report deadline for each board meeting - or 9 days prior to the meeting.

The board will use the following tools on a trial basis for the reporting process: Dashboard Template (Appendix B) and 4 P's Reporting Structure.

4 P's Reporting Structure

- Progress to plan
- Problems encountered related to plan or project
- Planned next steps
- Partnerships needed for success

Strategic Focus Area	Board Accountability Lead	Staff Reporting Partner
Board Development	Committee on Directors Chair (President Jordan Thorpe)	Executive Director (Susan Olson)
Fund Development	Development Committee Chair (Vice President Andrew Wulf)	Development Director (Oana Alexan)
Program Development	Ad Hoc Program Development Committee Chair (TBD)	Program Manager (Annette Melendrez)
Resource Development	Ad Hoc Resource Development Committee Chair (Jane Barr)	Executive Director (Susan Olson)
Systems Improvement for 3 E's (Efficiency, Effectiveness, and Empowerment of Staff)	Ad Hoc Systems Improvement Committee Chair (TBD)	Executive Director (Susan Olson)
Updated 6/17/19		

The first implementation period spans fifteen months, from April 1st, 2019 through June 30th, 2020. Action planning for the subsequent fiscal year (July 1st, 2020 – June 30th, 2021) will occur

ACKNOWLEDGEMENTS

This Strategic Planning project was made possible by the David and Lucile Packard Foundation, through an organizational effectiveness grant. We are grateful for the grant that allowed the planning to be a comprehensive and inclusive process.

We would like to acknowledge Development Director Oana Alexan for spearheading the process in partnership with Executive Director Kimberly Ferm. We owe a debt of gratitude to our diligent Strategic Planning Steering Committee, who faithfully drove the 7-month process with dedication, critical thinking, and a willingness to contribute wherever needed.

Steering Committee

Oana Alexan, Development Director
Benná Dimig, Board Secretary
Kimberly Ferm, Executive Director
Paula Harris, Strategic Planning Consultant
Celia Organista, Retired Nonprofit Executive
Teresa Ronsse, Community Member
Gina Swan, LMFT, Community Member
Jordan Thorpe, Board President
Andrew Wulf, Board Vice President

We would also like to thank all of our internal and external stakeholders who participated in the process, including taking surveys, attending full-day retreats, and participating in interviews. We value your participation and input tremendously.

APPROVAL

This Strategic Plan was approved by PVSS' Board of Directors on April 25th, 2019.

Jordan Thorpe, Board President

Signature

See the Strategic Plan with Appendices on our website by clicking [here](#).
To help us build a sustainable future, donate now by clicking [here](#).
Get our latest news: [Like us on Facebook](#).