

# COMPASS FAMILY SERVICES

Housing. Support. Hope.



STRATEGIC PLAN  
2020–2022



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# EVERY CHILD

deserves the chance to grow up in a safe and stable home. At Compass Family Services our mission is to help families experiencing homelessness and those at imminent risk achieve housing stability, economic self-sufficiency and well-being. Housing is central to our mission but lasting stability requires more than a lease and a key. Fifty-eight percent of families report active domestic violence, substance abuse or mental health issues when they enter our case management programs. Seventy-five percent are unemployed or underemployed in a region where living wage far exceeds minimum wage. To thrive and break the cycle of homelessness families need tools, resources and strategies to address the challenges they face with respect to income and childcare as well as physical and mental health.

Compass works in partnership with families to remove barriers to self-sufficiency using a comprehensive set of targeted services. Our housing-specific solutions include shelter, transitional housing, rental assistance, and rapid rehousing. But our programs go deeper. To create lasting stability, Compass services address the complexity of our families' challenges through immediate crisis support, case management, education-employment counseling, technology resources and training, mental health services, childcare, support around legal issues, and early childhood education.

**In a world that is often lonely, uncertain, and precarious, Compass remains a constant for families facing homelessness—a source of hope, community, and resources that give families a chance to move forward. We strive to be the foundation upon which our families build new futures, rewrite their stories, and go from surviving to thriving.**

To do this, we need to be at our best. The strategic planning process affords us the opportunity to refocus and make decisions that will fine tune the trajectory of the organization to maximize our impact.

# RETROSPECTIVE

Our 2015 Strategic Plan produced three key decisions that have positioned Compass to accelerate impact going forward.

**Focus:** Use data to increase impact through evidence-based solutions.

**Decision:** Hired our first Director of Impact & Learning. Today, we are more informed than we have ever been about who our clients are and which interventions have the biggest impact on their success.

**Focus:** Become better at influencing public policy in ways that benefit our families.

**Decision:** Hired our first Director of External Affairs & Policy. Compass has become an even more active and influential thought partner in key policy forums and conversations, and has sharpened messaging about our brand, our work and our impact.

**Focus:** Find a long-term, stable home for Compass.

In 2015 we identified a looming threat that would jeopardize our existence as an organization. With our office leases expiring and rents quadrupling in 2021, we would not be able to continue operations.

**Decision:** Assembled a team to address the real estate crisis on the horizon. As a result of this team's tireless work, creativity, and the help of a keystone benefactor, Compass now has a permanent home at 37 Grove Street, just down the street from City Hall.





## THE LANDSCAPE

The wealth gap continues to widen, and the Bay Area remains a place of both unparalleled innovation and unprecedented inequality. Our families face the same challenges as five years ago: lack of access to affordable housing, childcare, and higher education; underemployment and unemployment; ineffective policies and systems of care; and limited access to mental health and substance abuse services.

When families do find housing, it is often far from the communities they know. Families lose their local support networks and experience increased stress that comes with navigating new environments, all of which erodes the basic stability that comes with finding a home. While Compass continues to serve these families from afar, distance attenuates our impact.

Government funding policies have changed, and we face new regulations for prioritizing and allocating government-funded services for families in need. Our challenge is continuing services we know to be effective when program methodology diverges from the new guidelines.



# Strategic Principles 2020

Compass is more prepared than ever to create lasting change in the lives of families facing homelessness. We will be the foundation for families as they overcome challenges to stability, offering comprehensive services, compassion, resources, and a path toward lasting change.

Looking ahead, three principles will drive our strategy:

1. Family stability is our North Star.
2. Influencing public policy drives family outcomes.
3. Flexible revenue streams unleash creativity and drive impact.

## **Strategic Principle 1: Family stability is our North Star.**

The ultimate goal for every Compass family is stability; it should be the North Star that guides all our efforts. Stability is more than a home. Economic self-sufficiency and emotional well-being are essential to lasting stability. Compass delivers individualized services that address all the challenges families must overcome to thrive over the long term.

There are four pillars of stability for families facing homelessness. In order to be stably housed, families must attain a foundational level of stability in each area. Every Compass program should be squarely focused on increasing family stability in one or more of these areas:

### **HEALTH**

Stable families have the resources they need to address their physical and mental health challenges.

### **CHILDCARE**

Stable families have access to reliable, affordable, and safe childcare.

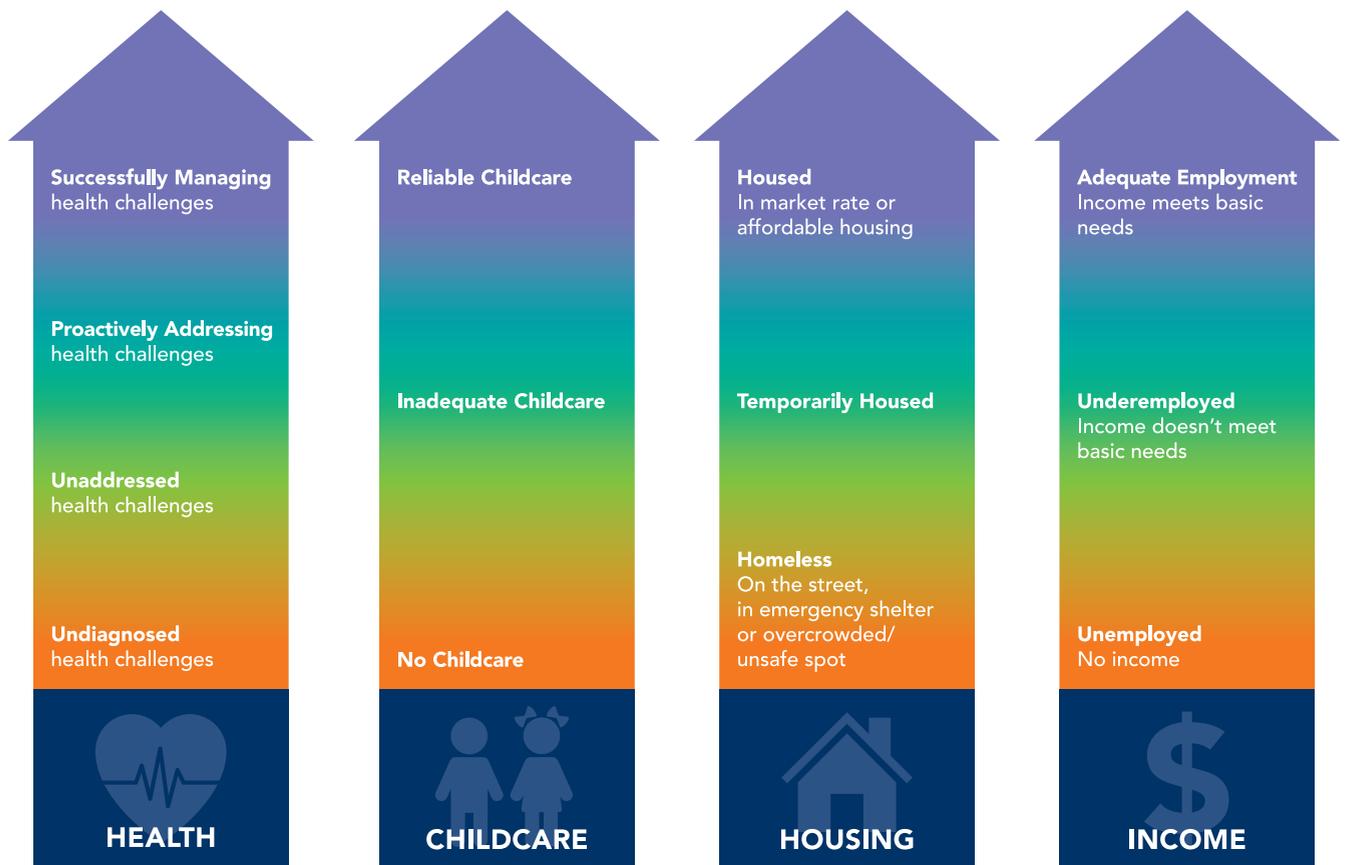
### **HOUSING**

Stable families live long-term in market rate or affordable housing.

### **INCOME**

Stable families have an income sufficient to meet basic needs.

# THE FOUR PILLARS OF STABILITY



Each family is unique and exists on a continuum of stability in each area.

**Unstable** families have significant needs in all four areas.

**Vulnerable** families are housed but often cannot maintain stability.

**Supported** families are well on their way but have yet to secure housing.

**Stable** families have all four requirements for stability well in hand.

This methodology highlights the symbiotic relationship between housing and well-being with regard to the success of our families. We often see families secure housing only to lose it because of unaddressed challenges around self-sufficiency and well-being. At the same time, families can only make so much progress

on their well-being in the absence of safe and stable housing.

Compass programs are designed to remove barriers to stability for all families, no matter where they find themselves on the continuum of stability.

Looking ahead, three operational priorities focus our efforts toward family stability:

1. Review and refine program services through the lens of stability.
2. Double down on data.
3. Stabilize families by maximizing team engagement, satisfaction and impact.

### REVIEW AND REFINE PROGRAM SERVICES THROUGH THE LENS OF STABILITY

As we developed the Family Stability Tool, we gained clarity about the types of families that access Compass services and their requirements for stability. The needs of “unstable” families versus “vulnerable” or “supported” families vary widely. Leveraging these insights, we are focused on targeting gaps in the service continuum to better meet the specific needs of each family. For example, families in the vulnerable category have housing, but for lasting stability they require more robust workforce development resources than we are currently providing.

We will determine the right mix of partner support and internal programming to increase employment and economic self-sufficiency for families. We will continue to pursue the goal of providing therapy-on-demand, expand our ability to link our clients to employment and training programs, and redouble efforts toward supporting families once they have transitioned from our active services or moved out of San Francisco.

In some cases, policy and funding changes have hampered our ability to deliver the services we know are effective stabilizers, and have put stability at risk for families in the affected programs. We will focus on restoring and strengthening these services through creativity, negotiation, and alternate funding streams.

### Goals:

- Identify where we are underperforming with respect to the services families need to maintain stability.
- Protect and extend those mental health services that are working well.
- Strengthen services in the Family Resource Center and collaborate with partners to address gaps in case management, workforce training and employment services.
- Invest more deeply in aftercare services to sustain stability for families after they leave Compass.

### DOUBLE DOWN ON DATA

Sophisticated data analysis is a powerful tool for driving performance in any organization. When combined with Compass’ deep experience with and understanding of the needs of families facing homelessness, data can become a superpower for improving families’ stability.

Building on the outcomes of the 2015 Strategic Plan, we will increase capacity in our Impact and Learning department to take us to the next level in our ability to make data-driven decisions. Data will become a key touchstone for measuring impact more systematically in every program, and we will use data to prioritize services that most effectively remove barriers to stability.

### Goals:

- Develop an organizational dashboard to track progress toward client stability targets.
- Embed data-driven prioritization within every program.
- Highlight data-informed program decisions in the Annual Report.
- Create an annual policy agenda that is shaped and supported by data analysis.



### STABILIZE FAMILIES BY MAXIMIZING TEAM ENGAGEMENT, SATISFACTION AND IMPACT

Strong working alliances between families and Compass staff are essential to our work. To achieve the level of impact to which we aspire, Compass must attract and retain high quality talent. The high cost of living and lack of affordable housing not only impacts families experiencing homelessness, it has adverse effects on our ability to hire new staff and maintain a consistent workforce. Recruitment is getting more and more difficult and we find ourselves losing high quality people to relocation as well as to better paying positions in government and the private sector. While our staff attrition rate is below the industry average, we think it can be better.

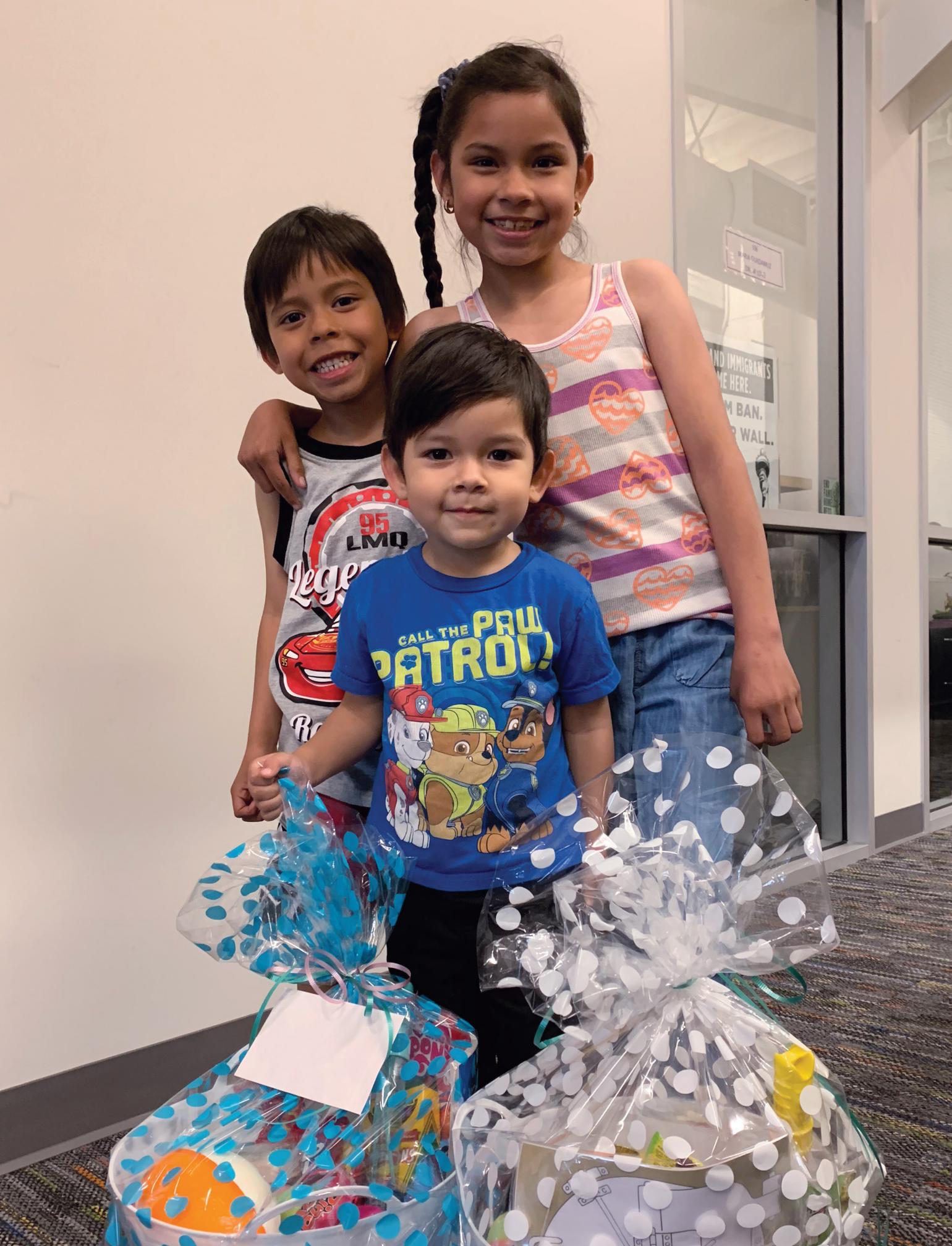
In order to maximize our impact on family stability, the team must be inspired by and aligned with the organization's mission and strategy. Each team member needs to understand the North Star of family stability and know why their work matters. We are developing data-informed key performance indicators (KPIs) for every program to clarify expectations, create equity and transparency regarding performance, and improve our culture of learning and accountability.

A diverse, equitable, and inclusive (DEI) working environment is central to recruitment, retention, and performance. We will continue to invest in our current DEI programs and as we do in all areas strive to constantly improve. We will expand our efforts with new initiatives in several areas: engage staff on how to improve transparency and communication, establish diversity targets for both the board and staff, and annually poll staff on our DEI efforts to evaluate our performance. We will elevate DEI work to the board level with board training and by establishing a board committee on DEI.

We know team alignment and DEI are key components of creating engaged, fulfilled, effective teams. To further advance our efforts in building strong teams, Compass will conduct an analysis of nonprofit recruitment and retention best practices and implement additional strategies to improve staff stability and, in turn, our impact on family stability.

### Goals:

- Maintain an annual staff turnover rate of 20% or lower.
- Implement an agency-wide communication plan to support staff alignment on the strategies to improve family stability.
- Increase diversity of board and leadership team.
- Deploy standardized, data-informed KPIs in every program.
- Identify and implement best practices in nonprofit talent management to improve recruitment and retention.



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## **Strategic Principle 2: Influencing public policy drives family outcomes.**

No matter how successful Compass is in helping individual families achieve stability, systems and policies must change if we are to effectively address the root causes of homelessness. We will leverage our expertise and reputation as an effective service provider to drive policy changes that promote family stability. To maximize our influence we must also partner with like-minded organizations to identify shared goals and marshal our collective efforts. Building on the progress catalyzed by the 2015 Strategic Plan, and led by the Director of External Affairs and Policy, we will advocate for what families need to thrive, educate the public and decision makers, and catalyze policy changes that directly improve the lives of the families we serve.

Looking ahead, three operational priorities focus our efforts to influence public policy:

1. Define and disseminate a focused policy agenda.
2. Build strategic partnerships and coalitions at the regional, state, and national levels.
3. Incorporate client-based advocacy.

## DEFINE AND DISSEMINATE A FOCUSED POLICY AGENDA

We will accelerate and focus our advocacy efforts through an annual policy agenda. The agenda will guide our policy work and serve as a template for strategic partners, investors, influencers, and key local and state policy makers to express our view of the most effective evidence-based practices and public-policy solutions for addressing family homelessness. These efforts will increase Compass' visibility and establish Compass as a thought leader on solutions to family homelessness with partners and policy makers at local and state levels.

### Goals:

- Create a data-informed and evidence-based policy agenda.
- Solidify Compass' position as a trusted thought leader and policy expert on family homelessness.
- Influence specific policies to reduce barriers to stability for families facing homelessness.

## BUILD STRATEGIC PARTNERSHIPS AND COALITIONS AT THE REGIONAL, STATE AND NATIONAL LEVELS

Compass has always worked in close partnership with local policy makers and other nonprofits who share similar goals. But we recognize that enduring solutions to the housing and homelessness crises will require regional and statewide coordination. Compass' strategic partnerships will expand to meet this challenge.

### Goals:

- Formulate a comprehensive plan for creating coalitions at the regional, state and national levels.
- Increase resources and funding for families by leveraging public partnerships.
- Improve access to housing and the range of support services for families facing homelessness by identifying and eliminating eligibility and access barriers.

## INCORPORATE CLIENT-BASED ADVOCACY

We believe our clients play a key role in helping us impact public policy. As we accelerate our efforts in this area we aim to expand client engagement in the policy process. Not only will client participation make us more effective, it promises to increase the well-being and sense of self-efficacy for those who choose to get involved. We will conduct focus groups with interested families and will research industry best practices on incorporating the constituent voice when developing our advocacy agenda.

### Goals:

- Develop a clear strategy for increasing client participation, informed by client feedback, and industry best practices.
- Engage families in advocacy efforts that support our focused policy agenda.



Employees from Compass corporate partner, Flexport, volunteer at Compass Children's Center



San Francisco leaders and Erica Kisch, Compass Executive Director, participate in the ribbon cutting ceremony at 37 Grove

WE BELIEVE OUR CLIENTS PLAY A KEY ROLE IN HELPING US IMPACT PUBLIC POLICY. NOT ONLY WILL CLIENT PARTICIPATION MAKE US MORE EFFECTIVE, IT PROMISES TO INCREASE THE WELL-BEING AND SENSE OF SELF-EFFICACY FOR THOSE WHO CHOOSE TO GET INVOLVED.

### **Strategic Principle 3: Flexible revenue streams unleash creativity and drive impact.**

While we will always seek funding from both public and private funding sources, private funding is by nature more flexible. Growth in flexible revenue streams frees us to explore new and innovative ways to help our families succeed.

As a result of the 2015 Strategic Plan, Compass made the ambitious decision to preemptively stabilize our future through the purchase of our service hub for families experiencing homelessness at 37 Grove Street in the heart of San Francisco. To fund this project, we have implemented a comprehensive fundraising campaign: *Housing. Support. Hope. The Campaign for the San Francisco Family*. We will raise \$30 million dollars over three years so we can own 37 Grove outright, replenish reserves, and fund our core operations throughout the course of the campaign.

This is an example where a flexible funding stream has enabled us to pursue a game-changing strategy that will fundamentally alter the trajectory of the organization.

We have already identified several areas where we need to invest more in order to achieve family stability. We will devote more resources to workforce development, mental health services, and aftercare support to increase families' likelihood of



The staff of Compass Family Services during our annual retreat

achieving lasting stability. In addition, changes in public funding policies have left some of our most effective programs at risk of decreasing impact. In order to maintain these programs we need to find alternate funding sources.

To grow private revenue sources we will leverage and expand our current donor base, increase the number of multi-year grants, and improve brand awareness to reach previously untapped sources of funding. This will provide financial flexibility to implement solutions that we know are effective, and ultimately help more at-risk families reach higher levels of stability.

Looking ahead, two operational priorities focus our efforts to increase revenue flexibility:

1. Implement industry best practices for donor management systems and processes.
2. Foster new revenue sources and raise the bar for existing sources.

## IMPLEMENT INDUSTRY BEST PRACTICES FOR DONOR MANAGEMENT SYSTEMS AND PROCESSES

To effectively reach our revenue goals and get to the next level in terms of flexible revenue streams, we need to apply best practices in technology, systems and processes. We need streamlined donor tracking tools and communication to create greater efficiencies for staff, maintain our increased donor base, and take a data-oriented view on donor participation.

### Goals:

- Migrate from a legacy donor management system to an industry-standard platform that is tightly integrated with our other core business tools.
- Research and apply best practices for data-oriented donor management.

## FOSTER NEW REVENUE SOURCES AND RAISE THE BAR FOR EXISTING SOURCES

Compass anticipates growing private revenue through a comprehensive development effort that focuses on maximizing revenue by putting donors at the center of all that we do. We will develop donor journey maps to build our understanding of the process donors go through as they decide to support Compass and ultimately become loyal, repeat donors and advocates. With the use of these maps, illuminating our understanding of the donor journey, we will adjust our operations to promote deep, quality, long-term relationships with our generous donors.

Raising awareness of family homelessness, and improving recognition of the Compass brand as a best-in-class organization, are essential elements to cultivating new revenue streams. Our goals are to develop and implement an annual marketing plan, increase publicity on public and private partnerships, provide more entry points for engagement, and highlight advocacy milestones and successes.

These collective efforts will have the effect of elevating the investment of current donors and increasing the number of new donors who are looking to invest in an effective and sustainable solution to addressing family homelessness.

### Goals:

- Meet capital campaign targets.
- Increase major donors by 25%.
- Increase lapsed donor conversion by 50%.
- Increase overall donor retention by 20%.



Matt Haney, San Francisco City Supervisor representing District 6, addressing attendees at the Compass 2019 Spring Benefit at the Ferry Building



Hello  
my name is  
ERICA

@TwitterDev



# EXPLORATION

In addition to the strategic priorities outlined, we will explore two areas that have the potential to fundamentally change the trajectory of impact on families:

1. Expand Compass' geographical footprint.
2. Use technology to increase continuity and impact of Compass services.

## EXPAND COMPASS' GEOGRAPHICAL FOOTPRINT

The cost of housing in San Francisco is a massive challenge to families facing homelessness, so the path to stability often includes moving to a home far from the City. Unfortunately this also means losing high-touch connectivity to services such as case management, childcare, and day-to-day, in-person emotional support from Compass staff. As illustrated by the Four Pillars of Stability, families need affordable housing. At the same time, moving farther from Compass jeopardizes stability as families struggle to maintain housing without ongoing services that confer well-being.

The housing market in San Francisco also puts strain on Compass staff, many of whom feel pressure to move farther away and commute, or to relocate to a more affordable region. Housing costs are a primary obstacle to the recruitment and retention of high-quality staff at Compass.

To address these parallel challenges, we will explore the idea of creating satellite offices. The hypothesis is that by putting team members closer to San Francisco families who have secured housing beyond the City we can have greater impact on long-term stability. At the

same time, we believe satellite offices have the potential to increase employee retention for direct service staff residing outside of the City.

### Next Steps:

- Complete a landscape analysis on the feasibility of locating staff outside of San Francisco.

## USE TECHNOLOGY TO INCREASE CONTINUITY AND IMPACT OF COMPASS SERVICES

Families often need ongoing support after they transition from more intensive Compass programming, whether they remain in San Francisco or move to other cities. We believe there is an opportunity to use technology to improve workflow, optimize bandwidth, and most importantly maintain supportive connections with families and reduce their isolation even after they exit intensive programming.

### Goals:

- Research technology solutions that can improve continuity of services to clients.
- Complete feasibility study for implementing virtual support technology.

# LOOKING FORWARD

Every child deserves the chance to grow up in a safe and stable home. This simple aspiration is surprisingly rife with obstacles and challenges that are immense, complex and at times daunting.

The decisions Compass made in the 2015 Strategic Plan have positioned us well to rise to the challenge. Specifically, the organizational strengths we've developed in Impact & Learning and External Affairs & Policy have increased the trajectory of our impact on family stability, and our permanent home at 37 Grove serves as a message to the vulnerable families we serve that we are not going anywhere.

As we embark on our new Strategic Plan we envision a diverse, vibrant and communal San Francisco where families from all backgrounds and experiences are able to thrive. Lasting family stability is our North Star. By squarely orienting every program towards stability we are poised, more than ever, to make a difference in families' lives.

**We are proud of the thousands of families we have already helped on their paths to stability, but truly believe our best is yet to come.**





# COMPASS FAMILY SERVICES

Housing. Support. Hope.

Compass Family Services is where families facing homelessness receive housing services and comprehensive support as they transition from crisis to economic stability. Having served San Francisco for over 100 years, we are the City's longest operating family safety net, and in cooperation with partner organizations, Compass Family Services will serve until the need ceases to exist.

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