

# Business Plan

OUR COURSE OF ACTION

VERSION 10.23

**HOMEFIRST**  
Where Homelessness Ends™

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# EXECUTIVE SUMMARY

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## OUR VISION

We envision a community in which everyone has a home.

## OUR MISSION

Every day HomeFirst works to end homelessness by providing a full spectrum of services to help people find a home, improve their lives, and stay housed.

## HISTORY

HomeFirst is a 501(c)3\* that began in 1980 as a response to an increase in homeless families using a local soup kitchen. Our first program provided shelter for eight families. Today, HomeFirst is a leading provider of housing opportunities – emergency, interim, and permanent to our unhoused and housing-insecure neighbors in the Bay Area of California.

With more than 40 years of experience, we view housing as a fundamental human right and understand that solving homelessness takes everyone working together. We are relentlessly focused on eliminating barriers to permanent housing and creating a path to stability for everyone we serve.

## FINANCES

Today, we are nearly a \$50M organization with 450 positions and 20 locations serving two Northern California Counties and growing. At the end of FY22, approximately 77% of our funding came from government sources and 15% from private grants. The remaining 8% is generated from corporate, foundation, individual giving, and rental income from our affordable housing sites. Our financial documents are available on our website at [www.homefirstscc.org/financials](http://www.homefirstscc.org/financials).

# EXECUTIVE SUMMARY

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## SERVICES

HomeFirst excels at working with vulnerable populations with the most barriers to housing. Strong communities offer a variety of affordable housing choices for every resident. Service providers like HomeFirst help establish or rebuild a foundation of permanence for those neighbors needing additional support to secure or maintain housing. HomeFirst leads the way in serving our community through low-barrier programming and services – meeting each person where they are and building a housing plan centered around the individual. This approach has proven much more effective in ending homelessness rather than just managing it.

We have emerged as a leader in the community by providing services to our neighbors who are unhoused and coordinating client care with other service providers and government agencies. The collaborative approach eliminates duplication, connects program participants to the right services sooner, increases accountability among providers, and allows us to share data and set common performance goals.

We are also collaborating with other organizations to develop long-term solutions to homelessness. By working together and strategically creating resources, we can make our vision of ending homelessness locally a reality.

## PEOPLE SERVED

- We served 5,553 unique individuals, families, and veterans in FY23
- 75% of those permanently housed in FY22 remained housed in FY23
- In FY23, we served 479 veterans.

# OUR TWO LINES OF SERVICE



- **Shelter Programs:** Emergency placement, typically in a congregate setting, for people seeking immediate shelter.
- **Street-Based Services:** Outreach and street case management efforts support the unsheltered by offering resources, linking to services, and encouraging shelter. Outreach is also tasked with locating people when selected for housing programs.
- **Interim Housing:** Temporary housing opportunities in private or semi-private units not intended for a permanent stay.



- **Rapid Rehousing (RRH):** Program offers time-limited rental assistance and services designed to support people with housing navigation and stabilization. The participant becomes responsible for rent at the end of the program. Our teams build relationships with local landlords to fulfill the needs of this program.
- **Permanent Supportive Housing (PSH):** A model that combines low-barrier affordable housing, health care, and supportive services to help individuals with a disability achieve housing stability.
- **Prevention & Early Intervention:** Strategizes to slow the influx of individuals and families entering homelessness and quickly resolves housing crisis for newly unhoused persons. This is typically done with one-time or very short-term intensive case management.
- **Owned and Operated Properties:** We own and operate four affordable housing sites for a total of 98 units across Santa Clara County.

# EXECUTIVE SUMMARY

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## GUIDING PRINCIPLES & BEST PRACTICES IN SERVICE

- **Housing First:** Our participants are housed as quickly as possible without any preconditions; once housed, we work on stabilization by addressing areas that led them to homelessness (E.g., the participant does not need to be housing ready).
- **Harm Reduction:** We focus on addressing the consequences of unhealthy behavior until the participant is ready to handle the behavior itself (E.G., needle exchange).
- **Low Barrier:** At our interim and emergency shelter sites, we eliminate as many requirements as possible to ease entry (E.g., entrance does not require sobriety). Low barrier does not mean “no rules.”
- **Constant Innovation:** Program Innovation is a term we use to describe a process for generating new ideas, services, and programs for new and existing customers to improve individual outcomes and increase the value of the organization’s positive impact on the community.
- **Excellence in Execution:** We aspire to excellence marked by diligent individual and collective effort. Pursuing excellence means always bringing our highest quality work forward and demonstrating integrity, accountability, and transparency. We will be satisfied only when we achieve the best we can envision for our clients and the operation of our agency.
- **Mission Metrics:** To track our effectiveness as an organization and progress toward goals, we created mission metrics and added them to our strategic plan.

# METRIC KPI'S



## MISSION METRICS



EXITS TO HOUSING  
23%  
In FY24



DAYS TO HOUSING  
137 Days  
In FY24



RECIDIVISM RATE  
20% In  
FY24

# EXECUTIVE SUMMARY

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## THEORY OF CHANGE

We aim to end homelessness and hold ourselves accountable for achieving it within a reasonable timeframe (e.g., 5–10 years). We specified **WHO** our population of focus is, **WHERE** our organization will work, and **WHAT** specific outcomes we want to achieve. Our **Theory of Change** explains **HOW** HomeFirst will achieve the identified community impact and the approaches we will undertake.

## CASE FOR CHANGE

Over the past eight years, HomeFirst has experienced a budget and staffing increase of **450%**. We have expanded from one County into a second with consideration of a third. To that end, our leadership team believed we must consciously protect our assets and resources. This enables us to remain steadfast in developing the quality of our services rather than overtax the organization's infrastructure with scattered or unplanned growth. As a result, the team refocused our strategic plan with mission metrics and KPIs, allowing us to track our progress toward our goals and engage in continuous quality improvement practices to pivot when our environment changes.

We made some clear decisions on where and how to expand by developing our growth strategies and a decision matrix used to vet all opportunities. We layered the updated plan with our **Theory of Change, Value Proposition, and Marketing and Communications Plan**, bundled into a robust business plan for the most significant impact and outcomes. This plan will be reviewed and adjusted annually for relevance, track targets toward our mission metrics, and ensure that we are serving our target population and the community in the best way possible.



# THEORY OF CHANGE

# HOMEFIRST

TO ACHIEVE OUR MISSION OF ENDING HOMELESSNESS,  
HOMEFIRST ENGAGES IN THE BELOW ACTIVITIES:

Where Homelessness Ends™



**CORE  
ELEMENTS**

**TARGET  
POPULATION**

**INDIVIDUAL  
OUTCOMES**

**COMMUNITY  
IMPACT**

**PREVENTION  
STREET BASED  
SERVICES  
EMERGENCY  
HOUSING  
SUPPORTIVE  
SERVICES  
PERMANENT  
HOUSING  
INTERVENTIONS  
AFFORDABLE  
HOUSING  
SYSTEMS  
LEADERSHIP**



**KEEPING OUR  
NEIGHBORS  
HOUSED  
HOUSING OUR  
UNHOUSED  
NEIGHBORS  
EFFECTIVE &  
EQUITABLE  
SYSTEMS OF  
CARE**

**SUPPORTING THE  
SOCIOECONOMIC  
AND CULTURAL  
DIVERSITY OF OUR  
AREA  
REDUCING THE  
TRAUMA OF  
HOMELESSNESS  
DECONSTRUCTING  
BARRIERS TO  
HOUSING**

**CREATIVITY • EXCELLENCE • PASSION • RESPECT • RESPONSIBILITY • TEAMWORK • ACTIVISM**

# COMMUNITY IMPACT



## SUPPORTING THE SOCIOECONOMIC & CULTURAL DIVERSITY OF OUR AREA

- Stability of race and ethnic makeup of area
- Income level and/or evictions



## REDUCING TRAUMA OF HOMELESSNESS

- % of Unsheltered homeless



## DECONSTRUCTING BARRIERS TO HOUSING

- Duration of current homeless episode



# VALUE PROPOSITION

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HomeFirst knows, from over 40 years of experience, that strong communities offer a space for everyone to flourish.

HomeFirst facilitates a path by which our housing-insecure and unhoused neighbors find a place to thrive utilizing a Housing First model of service. We distinguish ourselves by:

01

A pledge of employing diverse, dedicated, and passionate staff – many with lived experience in housing insecurity or homelessness.

02

Our approach to getting the job done. We remain nimble as a service provider and can shift quickly when a crisis like fire, flooding, or a pandemic confronts our communities.

03

A commitment to excellence in execution, vetting programs to ensure they meet best practice standards and implementation rigor, then evaluating outcomes internally through our (CQI) Continuous Quality Improvement process.

04

Continuously launching and evaluating innovative ideas like BHC (Bridge Housing Communities); SOAR (Services, Outreach, Assistance & Resource); and TRUST (Trusted Response Urgent Support Team) programs.

# OUR BRAND. AMPLIFIED.

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## MarCom Purpose & Mission

The Marketing & Communications department of HomeFirst is centered around promoting the agency's mission, vision, and values to internal and external audiences.

We accomplish this through the following:

- Strategic Messaging
- Brand Management
- Digital Marketing
- Content Creation
- Evaluation & Analytics.



## Current Climate

### Strengths

- Unified vision of HomeFirst brand
- Strong team dynamic and organization
- Premier communication
- Ability to pivot during emergency situations
- Considerate of new ideas or approaches

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### Opportunities

- Revamp digital platforms and extract its metrics
- Craft and improve imagery and videography
- Impact agency culture via transparent communication
- Tell the HomeFirst story separate from donor cultivation

T

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### Weaknesses

- Lack of resources (team members, funds, etc.)
- Establishing our dept's purpose within the org
- Quick access to program metrics and info
- Growth of the agency
- Low collaborative spirit from other departments

O

### Threats

- Rapid agency growth
- Lack of funding
- Political climate

## What's Next



We aim to be a comprehensive Marketing & Communications Team who handles external messaging, and internal communications, telling the agency story, and establishing our brand.



We ensure HomeFirst becomes subject matter experts for serving our community who are unhoused while becoming one of the most recognized brands in our sector.



We have well-established data, metrics, and processes empowering our staff to become strong, well-versed extensions of our brand when presenting at conventions, conferences, etc.

# TARGET AUDIENCE

Who are we telling our story to? What do they want to know?



# COMMUNICATION TOOLS



# GOALS & OBJECTIVES

## RIGHT SIZE MARCOM DEPARTMENT

Expand department to include Officer-level staff focused on Brand Marketing, Program Communications, and Website & Analytics.



## EXPAND BRAND AWARENESS THROUGH COMPREHENSIVE CAMPAIGNS

Host targeted, quarterly campaigns focused on programmatic storytelling, talent recruitment, systems leadership, and sector knowledge.

## BUILD UPON INTERNAL COMMUNICATIONS AND CULTURE

Craft a Program Knowledge Catalog.  
Establish an internal storytelling program.  
Integrate our Culture messaging.



## UPGRADE DIGITAL PLATFORMS

Upgrade website functionality and content.  
Create a baseline of data metrics across all digital platforms.  
Display ongoing, interactive program data and metrics.

## ESTABLISH SECTOR LEADERSHIP

Position HomeFirst as subject matter experts  
Create proactive editorial pieces..  
Actively develop relationships with media.



# FROM PLAN to ACTION



## Updates to our digital platforms.

- Action: Upgrade website functionality and content, create a baseline of data metrics across all digital platforms, display ongoing/interactive program impact data and metrics, develop a blog following, launch a HomeFirst Podcast
- Outcomes: Increase website traffic flow by 7% in 36 months
- Duration: The campaign will span over 12-36 months

1



## Position HomeFirst as subject matter experts.

- Action: "HomeFirst as a Leader" Campaign (Radio interviews, press stories, community-wide lunch and learns, HomeRoom Seminars)
- Outcomes: Increase number of interviews with media and community stakeholders by 3% YOY. Establish quarterly lunch and learns.
- Duration: The campaign will span over 12-36 months

2



## Continue to fine-tune and educate through comprehensive internal communications.

- Action: Create a process/tool to strengthen communications with SCIP, increase employee engagement with HomeFirst Hub, continue monthly newsletter publications, increase organic cultural visuals through photography.
- Outcomes: Employee Engagement Survey shows positive improvement in communications, staff report increased usage of HomeFirst Hub, 70% of digital content will include organic visuals within 18 months
- Duration: The campaign will span over 12-36 months

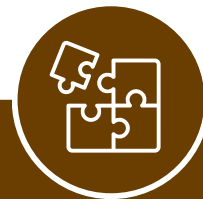
3



## Collaborative campaigns to support all departments.

- Action: Conduct three campaigns:
  - Great Place to Work Recruitment Campaign
  - Housing Focused Marketing Campaign
  - Donor Relations Marketing Campaign
- Outcomes:
  - Candidates report a more positive experience in the hiring process
  - Increase in candidate pool because of heightened awareness
  - Key stakeholder reports increase knowledge of permanent housing solutions offered by HomeFirst
  - Development/Community Engagement report an increase in monetary and in-kind giving
- Duration: The campaign will span over 12-36 months

4



## Expand our department roles.

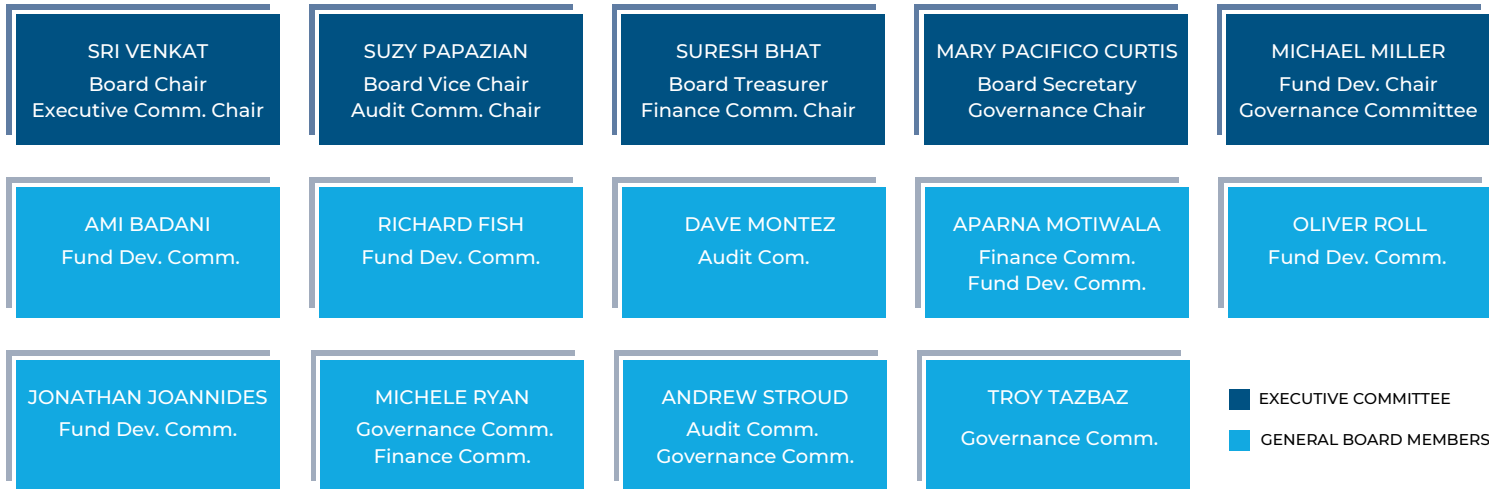
- Action: Hire for the following roles:
  - Program Communications Officer
  - Website & Analytics Officer
  - Brand Marketing Officer (formerly known as MarCom Officer)
- Outcomes: Team is fully developed by FY25 with established performance evaluations and goals.
- Duration: The campaign will span over 12-24 months

5

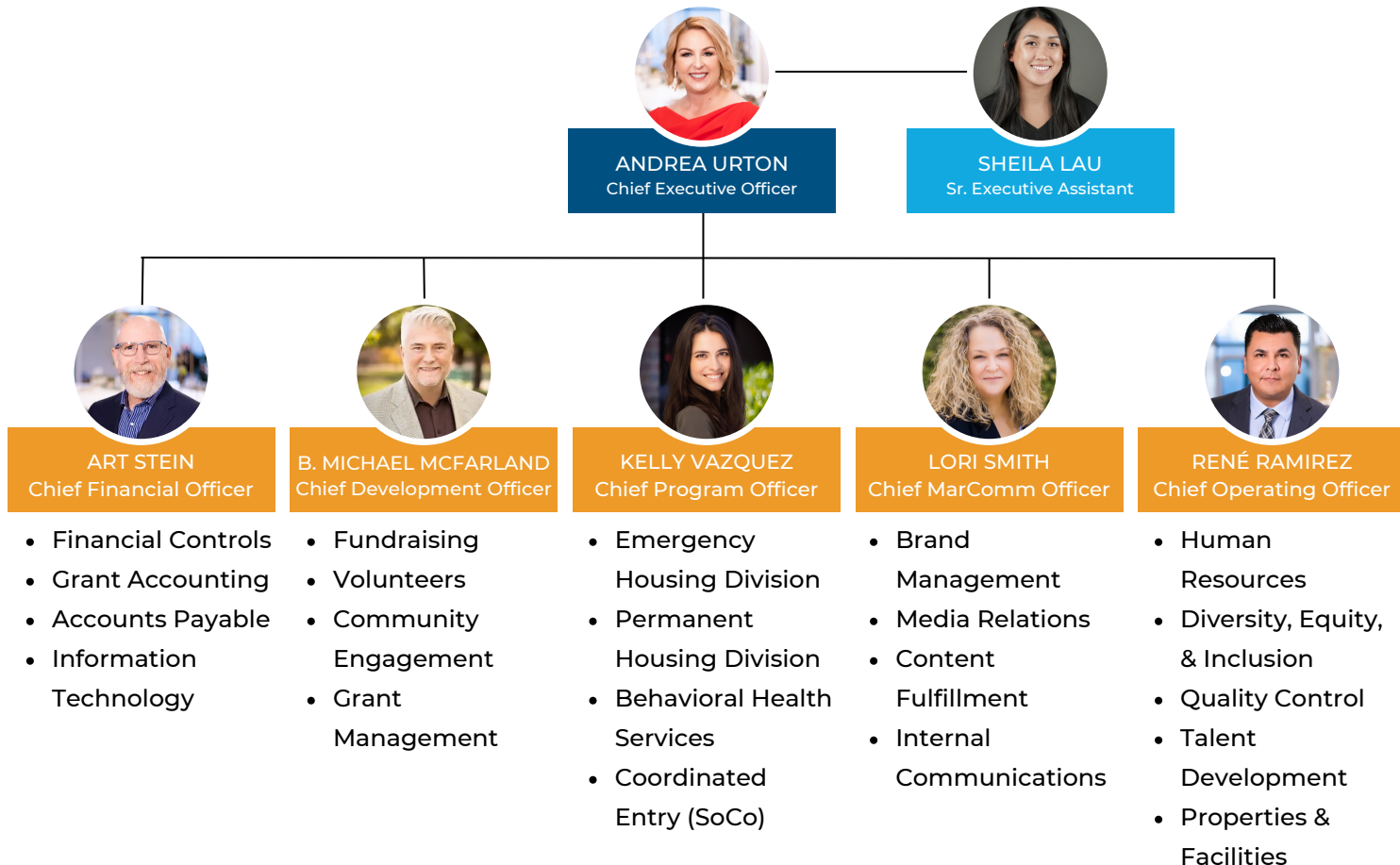
# INFRASTRUCTURE

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## BOARD OF DIRECTORS



## EXECUTIVE TEAM





# OUR VALUES

## Creativity

We are open-minded thinkers, ready to explore and test new ideas to get people housed.

## Excellence

We continuously examine our actions, practices, and course-correct to strive for seamless, transparent, and quality implementation.

## Passion

We fuel our work through intention and enthusiasm. We understand that hope can inspire positive outcomes even when doing difficult things.

## Respect

We honor the worth and contributions of every person. During times of conflict, we focus on our common ground.

## Activism

We empower our teams to use their voices to help foster positive change and dismantle inequities and systems contributing to homelessness and housing insecurity.

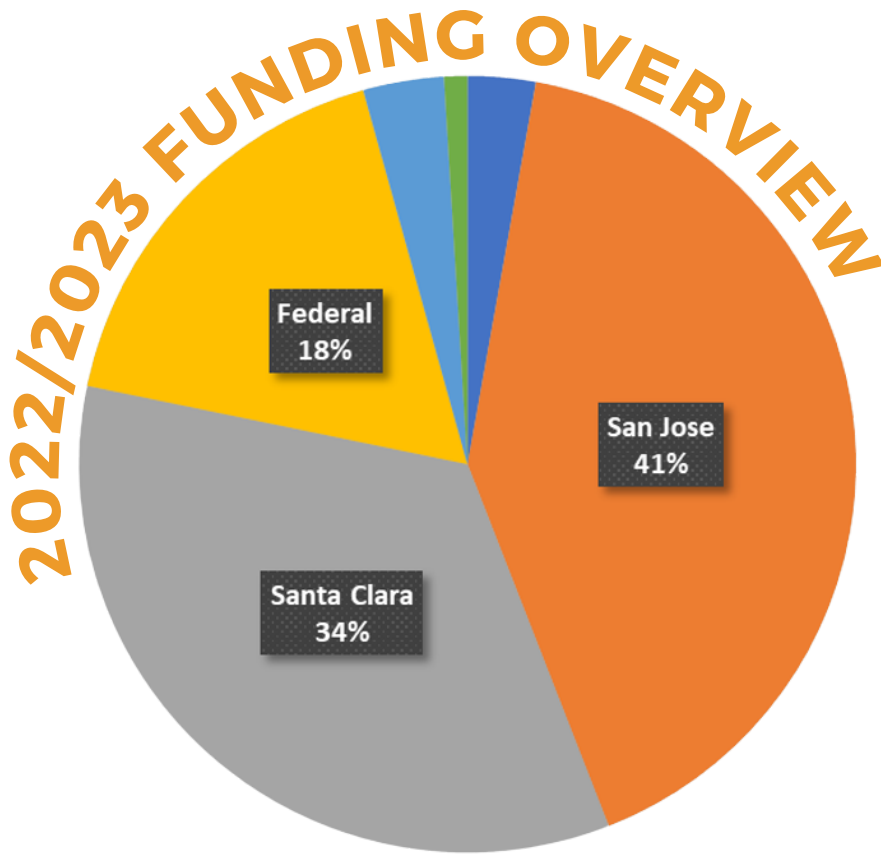
## Teamwork

We cannot fulfill our mission metrics by acting alone; we transform communities through effective communication and meaningful partnerships starting from within.

## Responsibility

We connect our actions to outcomes and feel the urgency in our service to operate with the highest standards and principles.

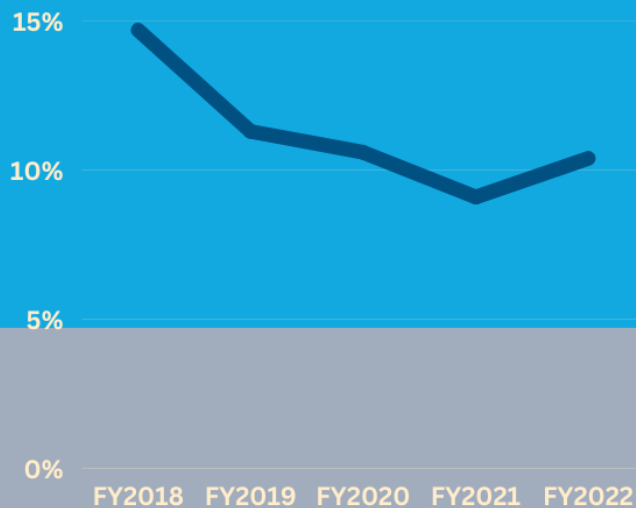
# REVENUE & EXPENSES



Management Expense as a % of Revenue

**90%**

**OF REVENUE IS DIRECTED  
TOWARDS ENDING  
HOMELESSNESS**



# GROWTH PLAN

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In an ever-evolving world where challenges persist, and opportunities arise, HomeFirst is steadfast in its commitment to creating a positive and lasting impact. This growth plan outlines our strategic approach to expanding our reach, influence, and effectiveness.

As we look ahead, we recognize that growth is not merely about increasing our scale but deepening our roots, broadening our engagement, and magnifying our influence to drive meaningful change.

Our journey is characterized by an unwavering dedication to our mission and the communities we serve. In this growth plan, we embrace this legacy while charting a course responsive to the shifting landscape of philanthropy, technology, and social dynamics.

Our growth is a testament to our commitment to strategic foresight, innovative thinking, and collaborative action. Throughout this document, we will delve into the key pillars that underpin our growth strategy:

## CATEGORIES OF GROWTH



### OPERATIONAL

Organic growth happens when we create the right conditions for expansion. This includes physically expanding office space to allow for growth. In this phase, we examine the infrastructure and complete a self-assessment of financials, technology, and other support structures.



### PROGRAMATIC

This type of strategy occurs when we expand current relationships with donors/funders and other key stakeholders. We are intentional about building new relationships with those in our community with an affinity to support our mission.



### EXPANSION

This approach focuses on long-term growth through specific initiatives and moving the agency into new areas of operation. Often this growth stage occurs after a period of organic growth.



### REPLICATION

The key challenge of this strategy is to replicate services outside of the immediate established service area. The core of replication assumes that our program/services will create a social impact in another geographic location with similar positive outcomes as legacy site(s).

# FIVE PILLARS OF GROWTH

- Alignment with agency Vision, Mission, Strategy & Goals to End Homelessness
- Funder/community commitment to support and strengthen the current service delivery system
- Positive community impact through implementation of promising/innovative practices with proven program outcomes to address the community needs
- Internal resources of the existing infrastructure and on-hand expertise to support successful program implementation
- Financial stability and availability of program support funding



## GROWTH CHALLENGES

- Balancing external demands with internal capacity, limitations, and resources
- Limited start-up funds
- Fundraising resource for new growth opportunities
- Payor commitment both for start-up and long term sustainability



## SUPPORTING FACTORS

- Agency reputation and leadership expertise
- Agency focus on leading systemic change while developing innovative solutions
- Agency culture
- Commitment to Continual Quality Improvement
- Financial strength of the organization and robust continuum of programs



## INNOVATION FACTORS

- Dedicated funding, time and resources
- Collaborating with Outside Experts
- Donor pool/grants and other funding support to promote sustainability
- Focus on creativity/out of the box thinking and best practice outcomes



## EXISTING COUNTIES CONSIDERATIONS

- Program impact on current service system in alignment with mission metrics
- Quality of payor/partner relationships
- Payor/partner responsiveness to change in community
- Positions agency as a system leader supporting innovative/best practices.



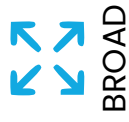
## NEW GEOGRAPHIC CONSIDERATIONS

- Alignment with HF mission & strategic plan goals
- Is the size and scope of the project sustainable as a stand alone and what other growth opportunities in the community
- What is the political, economic and funding climate in the new community
- Do we have the infrastructure capacity to implement the project

# GROWTH MATRIX

Legend	Current Service Portfolio	Service Innovation	Consulting Services	Current Payors	New Payors	Current Counties	New Counties
Growth Range							
Resource Demand							
Overall Risk							

## Key



BROAD



LOW TO MOD DEMAND MOD TO HIGH DEMAND



**Low Risk** = Potential negative consequences or setbacks are minimal, and the likelihood of success is relatively high.



**Moderate Risk** = A balanced level of potential reward and setback. These opportunities involve some level of experimentation.



**High Risk** = Carries a significant chance of failure or substantial setbacks but also has the capacity for an immense reward and impact if successful.