We began by including the board and staff in answering key questions—
• What must we do in the next 12 months?
• How should we consider growing our impact over the next three years?
• What is the one thing that would change everything?

Engaging with a wide variety of stakeholders, we came together (virtually) to share ideas, dreams, and aspirational goals to help end homelessness. Forty-two people took three hours out of their busy day to participate in the first ever virtual strategic session! Again, we began by asking questions—
• Is shelter a process or destination?
• What does success look like when addressing the future of homelessness?

What you will discover in the ensuing report are actionable strategies to realize the outcomes The Sophia Way plans to, and will, achieve in the coming years. Rather than calling this a strategic plan, The Sophia Way Forward is the framework for the future of the organization, the programs – the future for women seeking shelter, safety, and the stability of a place to call home. This is a working document that we, together with you, will constantly be updating and revising to be responsive and relevant among the ever-changing landscape of our community.

We invite you to join us on our journey forward.

With gratitude,

Alisa Chatinsky

Approved and adopted by The Sophia Way Board of Directors 2.2.21
THE SOPHIA WAY Forward

October 2, 2020

Is shelter a process or a destination?

What does success look like when addressing homelessness?

Key Ideas:
- The Continuity of care
- Collaboration
- Advocacy
- Understanding
- Energized humanity

Think about:
- The person, not an "OR"
- What does the person need?
- Missing
- Resources
- Safety
- Shelter
- Stability

The Sophia Way

- TSW: Extended family
- Ecosystem changes
- Community support
- Legislative

Start - Better, but safety is the best option!

Mental health

Resilience & Community

Need flexible funds

Working together

Inclusive

Mental health
The Sophia Way Forward: 360º

**Make Solutions Bigger**
Create public/private partnerships that view the system-as-a-whole. From prevention through housing solution. Develop community support, focus on key issues and experiment. TSW becomes a thought leader and key influencer.

**Reimagine City’s Facilities**
Shelter doesn’t have to look like shelter anymore. Work with industry, local government, planners and designers to utilize existing malls, office space, hotels as shelter space. Look to other regions to learn and innovate.

**Beyond Shelter**
Determine what is needed to provide a continuum of care for client segments, individualizing approaches for seniors, those with mental illness, disabilities, addiction or health-related issues.

**Create a Campus of Care**
Institutions and governments need to bring their core competencies and invest capital to ensure that the best and brightest are focused on key issues. Leverage Café exposure to drive stakeholders to become partners.

**Re-Purpose Space**
Shelter doesn’t have to look like shelter anymore. Work with industry, local government, planners and designers to utilize existing malls, office space, hotels as shelter space. Look to other regions to learn and innovate.

**Focus**

- Community Plan
- Beyond Shelter
- Re-Purpose Space
- Resources and Capacity
**Vision**
All women have a place to call home.

**Mission**
The Sophia Way is a place of hope and change for women. We support them on their journey from homelessness to safe and stable living.

**Values**

- Welcoming – We create a warm, welcoming space where everyone feels a sense of belonging.
- Dignity – We respect everyone, treating them with grace and honoring their lived experiences.
- Supportive – We partner with women and ask how we can best support them on their journey.
- Compassionate – We build and nurture relationships, being mindful and understanding that every woman has her own story to share.
- Inclusive – We value and embrace diversity and experiences, giving everyone the space to be their full, authentic selves.
The Sophia Way Forward: Strategy-on-a-Page

**Mission**
The Sophia Way is a place of hope and change for women. We support them on their journey from homelessness to safe and stable living.

**Vision**
All women have a place to call home.

**Values**
Welcoming • Dignity • Supportive • Compassionate • Inclusive

**Our Objectives**

- **Clarity of Mission**
  - impact + advocate

- **Scale Program Portfolio**
  - services + talent

- **Ensure Sustainability**
  - funding + governance

**Our Strategic Priorities**

- **Enhance public-private partnerships** to drive solutions and community plans. Advocate for The Sophia Way through all segments (government, foundation, corporate, individuals).

- **Define the right portfolio of client-centered services** to be more than a shelter. Investigate Campus of Care concept. Provide specialized services for unique needs of women and do so in the most efficient way.

- **Build a committed team**. Retain current staff while acquiring/developing new talent. Culture of Diversity, Equity & Inclusion.

- **Ensure financial stability** with efficient systems and processes. Clear donor strategy with increased private support.
## High-Level Tactical Plans

### Goal: Form public-private partnerships to drive solutions and community plans. Be the thought leader & advocate on homelessness.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Actions</th>
<th>Who</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Move from scarcity to abundance</td>
<td>Develop internal campaign to demonstrate: Focus + Competencies + Impact to be able to articulate clearly to multiple segments</td>
<td>Directors/BoD</td>
<td>Q1 2021</td>
</tr>
<tr>
<td>2. Greater impact and improved messaging</td>
<td>Create communication/engagement strategy to leverage World Café. Implement a donor moves management plan</td>
<td>Dev</td>
<td>Q2 2021</td>
</tr>
<tr>
<td>3. Strengthen community/member relationships</td>
<td>Build upon the Sophia Society concept, continue to strengthen long-term relationships with members</td>
<td>Dev</td>
<td>Q1 2021</td>
</tr>
<tr>
<td>4. Strengthen public/private partnerships</td>
<td>Create public/government affairs liaison</td>
<td>ED</td>
<td>Q2 2022</td>
</tr>
</tbody>
</table>

### Goal: Provide the correct portfolio of services to be more than a shelter. Create a one-stop Campus of Care to provide for all needs.

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<tr>
<td>1. Define the campus of care model</td>
<td>Bring community leaders together to determine the right model and mix of services to provide a continuum of care for defined groups, i.e. seniors, individuals with disabilities, addictions, etc.</td>
<td>ED/Task Force</td>
<td>Q3 2021</td>
</tr>
<tr>
<td>2. Deliver core competencies</td>
<td>Determine what TSW can best deliver and how to partner with other agencies to use their competencies</td>
<td>ED &amp; Program Team</td>
<td>Q2 2022</td>
</tr>
<tr>
<td>3. Increase housing sources</td>
<td>Develop task force with board members, partners and businesses to develop long-term solutions (see #3B)</td>
<td>BoD</td>
<td>Q3 2021</td>
</tr>
</tbody>
</table>
| 4. Transition 25% of appropriate clients within 120 days | A. Building the Housing Fund to get more women out of shelter  
B. Identify new housing sources – malls, hotels, master lease properties | Program Team | Q4 2021 |
| 5. Investigate consolidation with similar orgs | Bring partners into discussion, hire consultant for assessment | ED | Q2 2021 |
## High-Level Tactical Plans


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<tr>
<td>1. Right-size team to support initiatives and Campus of Care</td>
<td>Create Talent Plan to ensure the resources to grow impact. Possible new positions: HR Coordinator ('21), Facilities/Operations Manager ('21), Donation Manager (post-pandemic), Government/Public Policy Role ('22)</td>
<td>HR Coordinator</td>
<td>Q2 2021</td>
</tr>
</tbody>
</table>
| 2. Performance-based compensation system | A. Develop an Annual Feedback system  
B. Embed normalized process to evaluate performance and tie merit compensation to performance | HR Coordinator | TBD |
| 3. Formalized onboarding and staff training | A. Create Individual Career Plans to support development and training for all staff – Diversity Equity and Inclusion (DEI)  
B. Support leadership with development opportunities - DEI  
C. Develop and implement employee reward and recognition program | HR Coordinator | TBD |
| 4. Case Manager training for best-in-class expertise | A. Provide training on all HMIS protocols  
B. Become certified to provide trauma-informed care training and train-the-trainer. Explore as revenue source | Director of Client Services | Q2 2022 |
| 5. Improved social impact awareness | Develop a written Diversity, Equity and Inclusion (DEI) policy to promote to staff and community | Racial Justice TF | Q1 2021 |
| 6. Intentional succession planning | Embed annual review process for ED and Board succession planning. Intentional Board development - DEI | ED/Gov Comm | Q1 2021 |

### Goal: Ensure financial stability with efficient systems and processes. Clear donor strategy with increased corporate support.

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<tr>
<td>1. Comprehensive annual development and communications plan</td>
<td>Development team creates plan for 2021 implementation including volunteer engagement and retention</td>
<td>Dev</td>
<td>Q4 2020</td>
</tr>
<tr>
<td>2. Increase foundation support</td>
<td>Continue to build relationships and engage with major foundations</td>
<td>ED/DD</td>
<td>ongoing</td>
</tr>
<tr>
<td>3. Corporate sponsor partnership</td>
<td>Create a value-driven corporate sponsorship program, utilize Board to open doors and cultivate relationships</td>
<td>Dev &amp; BoD</td>
<td>Q2 2020</td>
</tr>
<tr>
<td>4. Efficient and repeatable systems and processes</td>
<td>Employee manual, dev/finance reconciliation, hiring and onboarding process, shelter training program, trauma-informed care training. Communication + Manage people thru transition + workflow/sub-process and tools</td>
<td>Directors</td>
<td>Q4 2021</td>
</tr>
<tr>
<td>5. One year of financial reserves</td>
<td>Form task force to develop a plan to build capacity and ensure sustainability with adequate reserves</td>
<td>FC &amp; Directors</td>
<td>4Q 2023</td>
</tr>
</tbody>
</table>
Provide the correct portfolio of services to be more than a shelter. Investigate campus of care concept. Serve more, in the most efficient way.

Form public-private partnerships to drive solutions and community plans. Be the thought leader and advocate on homelessness.

Create a task force to investigate solutions for 55+ population Q2 2021

New/strengthened relationship with major corporation & foundation Q2 2021

Determine Scope of Gvmt Liaison/Public Policy Role Q2 2022

“Campus of Care” Task Force in-place by Q3 2022

Bi-annual review of the correct portfolio of services and measures

Increase # women housed/remain housed by 50% by Q4 2021

Create tools, workflow, processes to effectively manage organization, staff/board transitions, and communications by Q4 2021

Increase employee retention rate six months by Q2 2021

Talent Plan with DEI metrics developed by Q3 2021

Build the best team. Retain current staff while acquiring/developing new talent. New initiatives on Diversity. Equity. Inclusion.

Ensure financial stability with efficient systems and processes. Focused donor, corporate and foundation strategies.

Community Engagement/Dev Plan by Q1 2021

Enough cash flow for no dips into reserves by Q1 2022

Establish One Year Financial Reserves by Q4 2023