

The CEO's review of the 2019-22 Strategic Plan for the Safe Haven Family Shelter

Please find attached my report on the agency's Strategic Plan. I briefly hit all of the goals, successes, and strategies in the original Plan. Please remember that I was not a part of creating this Plan. I have been here just over a year and these are simply my observations about the Plan.

As for the Measures of Success, I used our stoplight format (green meaning done, yellow meaning partially accomplished, and red meaning that there has not been progress). I only put green lights on successes that I know we fully achieved. Unlike the financial stop light where it is obvious if you are ahead or behind, there is much more room for interpretation here. And that is why some may feel that I am wrong—which is perfectly ok. These, again, are just my opinions based upon what I have seen and what I have been able to determine during my short stay here.

Always happy to answer questions about any of this.

Jim Shulman
August 20, 2022

The Strategic Plan had four goals. Each goal has Measures of Success and then a number of strategies to achieve the goal.

Goal I. PROVIDE COMPREHENSIVE RESOURCES to meet families where they are in order to prevent or minimize the occurrence of homelessness and to support a hopeful and bright future for their children.

Measures of Success

- Percent of families who find and retain permanent housing (in our program and after they leave our program)
- Reduction in average length of stay in Shelter.
- Percent of families who achieve their employment and income goals.
- Reduction in number of families experiencing homelessness in Metro Nashville.
- Resources to support development and resiliency available for children and youth.

Strategies:

Continue to play a leadership role with the Coordinated Entry System (CES) to meet the needs of families facing homelessness.

Safe Haven was an extremely important part of the initial development team that helped to create the City's CES (or CE) process. The CE process continues to be used today. It is an important tool for several reasons: (1) it gives us an idea of how many families are in need of services in the City (which is way up right now); (2) it prioritizes services to families that need it the most; (3) it attempts to keep organized a very complicated situation; and (4) the Department of Housing and Urban Development requires us to utilize it for purposes of their funding.

The CE process is a good tool to have. There is some flexibility around its use. It does seem fair to say that the CE process doesn't address every situation, including emergencies. Efforts are underway to address those situations.

Ensure that a robust Prevention strategy is in place to keep families housed.

Safe Haven pivoted away from prevention several years ago. According to Jennifer Reason, "United Way no longer funds us to do prevention work. As we have honed in on our RRH practices and really become the biggest RRH provider for families in Nashville, we realized that it was difficult to also focus on prevention and other agencies were already doing it well. With discussions and funding changes, we were asked and decided to focus our efforts on RRH services."

Explore and implement Diversion strategies that work for families in our community.

The strategy of diversion is utilized by Safe Haven but not as part of a set process. The use of diversion could probably use a review both here at Safe Haven and across our community. It would make sense to divert families from ever coming into a program like ours if there is a way to provide for the needs of the family up front.

Continue to operate a safe and inviting Shelter for families.

The Shelter is now open; five rooms are being used and the other five will open shortly.

Expand, develop and retain our network of landlord partnerships and other affordable housing options.

I believe Safe Haven shines here. It is an area where we lead the community. Brittney Brown and her team has done an exceptional job of finding, developing, and retaining a large network of landlords while always looking for other options. The same can be said for working with hotel space for temporarily sheltering our families.

Pursue a permanent supportive housing solution for families.

Collen Mayer has led the effort here, working for the last couple of years with former Board member Gary Cooper and a team of individuals looking at a possible new permanent supportive housing site and building. Understanding that such a move is not easy right now in a city like Nashville, the group has come up with ideas and plans for a twenty-unit apartment complex. Jennifer Chalos is currently reviewing those efforts for the Board.

Develop and offer services that support resiliency and enrich childhood development, including resources for children and youth once their families are housed.

The Youth Program within Safe Haven spends a great deal of effort engaged with the children in our program providing them with books, program referrals, and sign-ups for area programs. There is a birthday club, Holiday gifts, a school back-pack program, and kits that allow families to celebrate events and holidays together. One area that I would suggest in this program (and that will be coming to Safe Haven with the Family and Children's Services grant) is a focus on therapy for the kids who need assistance with trauma. Most, if not all of the children coming through the program, have suffered through some form of trauma. While those kids are in our program, we can help them deal with trauma so that those issues don't continue to linger as they get older.

A great deal of time is spent with children around school enrollment. We may also want to re-evaluate how we check and assist children in the classroom, specifically if they have been moved from school to school. With the pandemic still invading our lives, helping kids who have fallen behind academically (or may fall behind) is a must (with or without a pandemic). I know we have individuals that work with some of our kids; I am sure that it would be beneficial to put forth additional effort and resources to help these kids.

Provide wrap around services for families including employment, financial literacy and mental health/substance abuse resources.

I know we excel in rapid rehousing but many people still preach the concept of “housing first but not housing only.” We do, through our case managers and through the concept of Critical Time Intervention (CTI), provide or direct our families to resources. I believe that those wrap around services are vital for our families to sustain their housing and provide opportunities for themselves and their children. This may be one of the hardest areas that any agency, including Safe Haven, has to deal with. But with employment opportunities plentiful in Nashville, with financial literacy programs available for our families, and with a national cry for more mental health/substance, we have a unique opportunity to provide assistance to the people we serve.

Determine and implement the best methods to support Safe Haven families when they move to contiguous counties.

It is my understanding that we do have families that move to counties outside of Davidson County and we do provide continuing services and case management to those families. With soaring housing prices in Nashville and with the lack of affordable housing, Safe Haven needs to be preparing for more families moving out of Davidson County. We need to build on our landlord partnerships outside of the county, as well.

Goal II. ADVOCATE FOR EFFECTIVE COMMUNITY STRATEGIES

through forging partnerships and promoting policies that will bring an end to family homelessness.

Measures of Success

- Public sector policies in place to end family homelessness
- Extent of collaboration with community partners
- Feedback from key partners and stakeholders

Strategies:

Educate policy and decision makers about what works in solving family homelessness.

Discussions about how to address homelessness (including families experiencing homelessness) in Nashville and the surrounding areas has been going on for years, with a great deal of work by many dedicated agencies but not significant movement in solving the overall issue. The fact that Nashville is growing quickly and that its cost of living (specifically with the cost of housing) is increasing adds additional layers and barriers to addressing the concern.

It has also been pointed out recently that there has been a lack of clear authority in Nashville as to who is the ultimate decision-maker when it comes to time to act on possible solutions.

Having said that, there are no real public sector policies that have been put into place to end family homelessness in our area. One could argue

that the “coordinated entry” procedure is a policy, but it is focused on prioritizing which families get services and not necessarily used as a tool to end family homelessness. There also does not seem to be, after reviewing the situation, any real significant collaboration by the entities who provide services to families experiencing homelessness to effectively “educate policy and decision makers about what works in solving homelessness.”

Convene and leverage resources of our public sector and community-based partners to end family homelessness through collective input.

Through discussions known as Functional Zero, there is a current effort to bring together involved agencies and community-based partners to discuss, leverage, and implement an effort to “essentially” end family homelessness.

With the Mayor’s new effort with an outside consultant, there is also expected to be an additional effort at addressing all aspects of homelessness, including families experiencing homelessness. If that occurs, then Safe Haven should expect to be a part of a concerted effort to “convene and leverage resources of our public sector and community-based partners to end family homelessness through collective input.”

Research and communicate current trends, issues and proven practices in ending homelessness and improving the future for families.

With the need to always be learning of new efforts and initiatives, Safe Haven, even with its involvement with Functional Zero and its efforts regarding Rapid Rehousing, could step up its efforts with both national groups and similar agencies around the country to determine what seems to work along with new evidence-based practices.

Serve as a resource/consultant to communities seeking advice on meeting needs of families facing homelessness. (I take this to mean serving as a resource to groups outside of Nashville.)

Safe Haven has become a much more visible presence at meetings within Nashville when it comes to discussing and addressing the needs of families experiencing homelessness. With the Mayor's new study occurring, Safe Haven must continue to play a significant role in those discussions. Two major factors that are playing a role in that review: (1) the various forms of homelessness (individuals, families, Veterans, chronic) are interrelated in this overall review. Efforts to address one area has an impact on the other areas. (2) In order to bring about significant change in the area of homelessness in Nashville, all entities must come together and work cooperatively.

We did host an individual from Arkansas that was interested in learning about our operations. Safe Haven should be doing more of that.

Goal III. EXPAND FINANCIAL SUPPORT AND AWARENESS to increase our community's investment in ending family homelessness.

Measures of Success

- Total funds raised
- Development targets met by sources of funding
- Number of new and retained donors
- Indicators achieved for marketing/communications plan

Strategies:

Expand Major Giving and initiate a planned giving program.

Currently, there is not a specific effort underway to expand major giving or to initiate a planned giving program.

Grow the number of monthly donors through direct mail and online giving.

Through marketing efforts, the distribution of materials (including our first-ever Annual Report) to our donor base continues to get the word out about Safe Haven. In terms of increasing the number of monthly donors through that effort, the results seem to be working (although it cannot be tied specifically to the marketing efforts). The number of overall donors for the agency for the year grew from 1484 in 2019 to 1722 in 2021. Retained donors seem to be remaining steady and even growing. New donors, however, last year (2021) were down.

Explore models and launch a capital campaign to fund permanent supportive housing and our organizational capacity to sustain it.

Efforts are currently underway to explore the creation of a twenty-unit facility that could be utilized as permanent supportive housing for Safe Haven. In conjunction with that review, there is on the table a question as to how the agency deals with the growth of its organization. An initial effort led by former Board member Gary Cooper has yielded a design of a permanent supportive housing project. Because of the nature of the project and the overall cost (both of the PSP project and any additional agency needs), the Board requested that another former Board member, Jennifer Chalos, review the needs and requests regarding space. Ms. Chalos is to report back to the Board as to her findings.

Obviously, those findings would help to determine how, or if, Safe Haven would proceed on any capital campaigns.

Offer more opportunities for corporate engagement through volunteer projects, connection with families, events, and financial support.

Even before the opening of the Shelter, Safe Haven had started back its volunteer programs (after the pandemic) with outside entities, including corporate partners. Whether it involved dealing with supplies, participating with children's events, or providing meals to our

families, the number of volunteer activities has increased significantly this year. It is an essential tool for getting things accomplished, helping our families, building relationships, and establishing potential financial ties. See attached information.

Continue to build upon and seek new relationships with foundations and faith communities aligned with our mission and goals.

Safe Haven is always building upon existing relationships with our foundation and faith-community sponsors. As for new relationships, the agency received an amazing \$75,000 grant from the St. Rita Mercy Foundation. And Safe Haven just received a \$25,000 check from the Tracy Lawrence Mission Possible Foundation through their golf tournament. We also highlight faith community efforts and foundation donations on our social media.

Evaluate and update our traditional events as needed and seek more opportunities for third party events that benefit Safe Haven.

Safe Haven continues to build on its signature events (Dancing for Safe Haven, the Hike for Safe Haven, the Taqueria del Sol Holiday event). The Hike was moved to a virtual event due to events beyond our control; we were still, however, able to reach our goal for the event. This past year's Dance raised the most money ever. The Taqueria event was packed last year and had significant matching sponsorships that ended up helping the event raise over \$80,000.

Each event, after conclusion, is evaluated for purposes of making changes to improve the overall gathering. With Tinti Moffat's help, several different activities were added to the Dance this year which resulted in additional funds raised for Safe Haven.

Safe Haven has also been the recipient of gifts through community events (best burger competition), corporate events, and golf tournaments.

We also participate in the Big Payback and Giving Tuesday, fundraising efforts through the Community Foundation of Middle Tennessee,

Provide opportunities for individual and corporate volunteers to become sustaining donors.

Safe Haven typically follows up with its volunteers to thank them for their service to the agency and provides them with an opportunity to donate. There may be a more specific way to keep those volunteers involved. Amanda Wood is our new Volunteer Coordinator and seems interested in finding new ways to get and keep people involved.

Foster a culture of philanthropy and engage each board member in a meaningful and rewarding development role.

To the most extent, we could do a much better job of engaging our Board Members in “a meaningful and rewarding development role.”

Build a development/marketing team to support our capacity to achieve strategic priorities.

As for the agency internally, this is an area where we need to develop an overall strategy as to what we need as a growing entity. Rachael Wilkins has an initial plan that is being expanded to include details as to what is needed (grant manager, event director, development associate, etc.) We have an extremely strong marketing team (made up of Board members, Advisory Council members, Young Professional Council members and staff) that play a key role in our marketing efforts.

Evaluate the profitability of the Staff 360 social enterprise model.

The profitability and the feasibility were both reviewed by Safe Haven and the social enterprise model was disbanded.

Develop and implement a year-round Marketing/Communications plan with strategies for targeted audiences including social media.

Done (and attached)

Goal IV. BUILD ORGANIZATIONAL CAPACITY to achieve and sustain excellence in leadership, programming and operations as we grow.

Measures of Success

- Staff feedback, performance and retention
- Board indicators for engagement (attendance, active roles, giving, etc.)
- Volunteer hours, feedback
- Meet or exceed standards for operational and management excellence
- Adequacy of space to support effective programming and operations.

Strategies:

Foster a supportive, trauma informed and client centered culture throughout the organization

Safe Haven provides an exceptional supportive model for its case managers and support staff to function. Overall, the agency's focus is and must continue to be on our clients and how best to not only provide housing but also for us to give our families the tools to sustain their housing. As for "trauma informed" culture, new staff are trained extensively on how to handle and appropriately deal with families and their trauma. But trauma informed can also mean that we need, in dealing with our families, to help our families (and specifically the children) deal with the trauma that they have incurred. It has been said that all of the children that enter our program come with varying forms of trauma. One of the things that I would encourage Safe Haven to focus on is increasing its level of assessment and trauma informed care

for its clients. With the addition of two therapists coming from the Family and Children's Services grant, Safe Haven can utilize those therapists to better assess and provide assistance to our families.

Be an employer of choice for mission driven, high performing individuals who want to make a difference for families as a member of the Safe Haven team.

There are some exceptionally talented individuals that work at Safe Haven that strive every day to make a difference for the families that we serve. And that is who Safe Haven wants and should continue to want as employees here.

Promote learning, innovation and teamwork through staff development opportunities and effective internal communication.

One of the items that was provided to me upon coming to Safe Haven and that has appeared in more recent surveys is the feeling by some staff that there is not ample room for development opportunities. We need to create more opportunities for employees to develop; those opportunities will fuel more learning and innovation. It has also been made very clear to me that internal communication (including from me) needs to be much better. With the help of GNA Consulting (our HR folks), efforts continue to be made to improve that communication.

Broaden our management succession plan to encompass leadership and career development.

The answer for the previous question summarizes this strategy as well. We need to find more ways to promote talent and provide them with ways forward.

Implement best practices in board development, engagement and leadership succession.

This is an area that I (the CEO) need to step up and address. A number of Board Members feel that they are not connected or connected enough with the agency. They are busy in their own right but do want, as a Board member, to contribute in some way (whether volunteering, adding assistance and insight, or donating). With the help of staff, I need to find better opportunities to engage with the Board (and the Advisory Council and the Young Professionals Council, as well).

Evaluate and refine staffing structure as we grow to support families and meet operational needs.

Since I have been here, Safe Haven has not really looked at an overall review and evaluation of its staffing structure. We have certainly grown in the past several years and there have been new supervisors put in place to handle that growth. The organizational chart seems roughly the same as three years ago, however, and could probably use some refining. The current organizational chart is attached.

Expand meaningful volunteer opportunities to support and sustain programs as we grow.

With the end of the pandemic, more volunteers seem to be entering our facility and doing good work. We want volunteers to enjoy their experience here and feel that what they are doing is meaningful (so that they will want to come back). With the shelter now open, more groups are providing meals and joining the list of people supporting our program. As mentioned before, our new Volunteer Coordinator seems very engaged in creating new opportunities and growing the Volunteer Program.

Monitor and continuously improve safety practices and address risk management.

This area could be much better overall. While we have checked our level of insurance for covering risks that we might have, we could always improve upon our overall management of risk. For example, we did incur a slip and fall at the last Dancing for Safe Haven event. Fortunately, the individual was ok. But, those types of situations should be expected and planned for.

As for employee safety, that should be a major concern. We need a much better system for knowing where our employees are (when they are alone and out in the field) and a system that can help keep them safe. We are looking into a one-push button system that can alert authorities (and us) if one of our employees is in need of help. It can

track (using current technology) where an employee is; this type of devise seems to be a much better system than having to depend on finding and utilizing one's phone. Our new Operations Director, Rolanda Cayton, is working on reviewing what the possibilities are.

Evaluate and develop best options to meet facility/space needs for services and operations.

This remains an ongoing area of discussion. The Board has retained the services of Jennifer Chalos to look at the needs of our families and our staff as the agency grows.

In addition to the annual budget process, maintain a rolling three-year financial forecast with contingencies based on various assumptions about revenue and expense

This strategy has been discussed but is still in the process of being developed through the work of Collen Mayer. It is vital for any agency (especially not-for-profits) to constantly be aware of its revenues and expenses; the future is always uncertain as we have learned recently and our numbers rise and fall with changes in the country, with Government Administrations, and with the economy. Our current revenue structure is now more heavily favored towards governmental grants. Those grants are hopefully solid for the next several years but we always need to be planning in the event that things change. This strategy is a must for this agency.