

working, dreaming, growing
TOGETHER

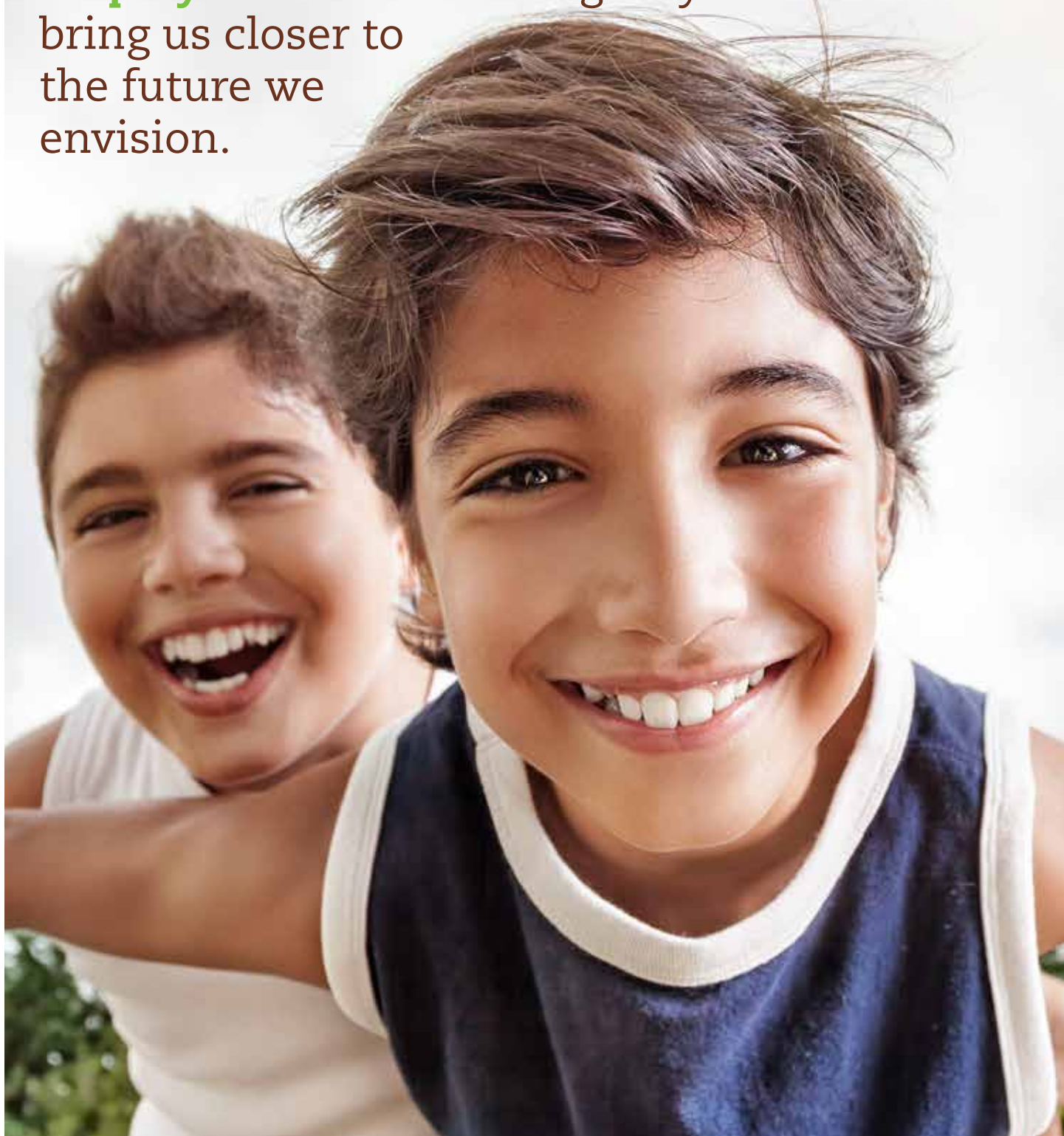


Foothill Family

Rooted in caring since 1926

STRATEGIC PLAN | 2024-2029

By **working** together, **dreaming** together, and **growing** together we will achieve our **5-Year** Strategic Plan to deliver **\$50 million** in annual crucial services, provided by our **500 employees** to fulfill our Agency mission and bring us closer to the future we envision.





working, dreaming, growing
TOGETHER

Foothill Family STRATEGIC PLAN 2024-2029

contents

4

Introduction

- From the Executive Leadership Team
- Results of 2018-2024 Strategic Plan
- 2024-2029 Strategic Planning Process
- Foothill Family Guiding Principles

12

Observations

- **Priority Area 1:** Build Capacity to Support Growth
- **Priority Area 2:** Financial Sustainability and Efficiency
- **Priority Area 3:** Retain and Develop Talent Pool
- **Priority Area 4:** Enhance Philanthropic Practices

21

Strategic Goals and Objectives

- **Goal 1:** Expand Impact and Grow Reach of Programs and Partnerships
- **Goal 2:** Develop Organizational Capacity to Enable Growth
- **Goal 3:** Increase and Diversify Financial Capacity to Resource Growth

31

Appendices

- Cross Functional Focus Areas
- Goals & Objectives By Cross Functional Focus Areas
- Board Committee Monitoring
- Research Results
- Interviews
- External Interview Summaries



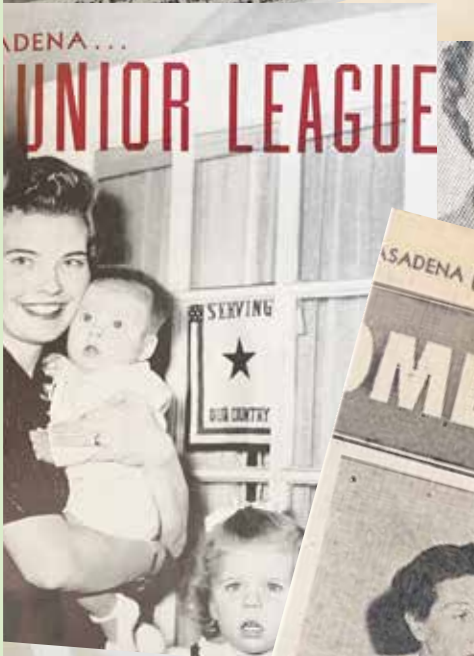
FOOTHILL FAMILY history

From its start as a small social service agency in 1926, Foothill Family has served thousands of children and families, putting arms around anyone in need of help and bolstering its growing communities.

Ninety-eight years later, the Agency impacts the lives of over 24,000 individuals annually through community education and outreach, mental health, early childhood development, and a broad range of social services.

The unprecedented upheaval of the worldwide pandemic and the volatility of the post-pandemic years have affirmed the need for thoughtful and strategic planning to ensure the Agency's stability and continued growth.

Standing firmly on the strong foundation of its prior Strategic Plan, Foothill Family not only survived the turbulent years, but grew and flourished, allowing the Agency to be the stronghold that children and families needed to survive and thrive.





from the Foothill Family

EXECUTIVE LEADERSHIP TEAM

With our centennial year coming in 2026 and many bright prospects and opportunities ahead of us, we are pleased to present the Foothill Family 5-Year Strategic Plan for 2024–2029. This Plan is an ambitious, forward thinking one founded on the progressive growth of the past decade, while embracing the opportunities brought on by seismic shifts and changes within the human services landscape and based on our unwavering commitment to serve children and families and their ever-growing needs with relevant, responsive, and sustainable programs.

Our Strategic Plan was thoughtfully informed by input from both internal and external stakeholders through surveys, interviews, and focus groups. With the gathered qualitative and quantitative data and the overarching intent to grow the Agency to a \$50 million organization of 500 employees, our goals and objectives were formed by the collaborative efforts of our Board of Directors and Senior Leadership.

With a focus on expanding impact, fostering growth readiness, and securing diverse funding, Foothill Family aims to transform lives across more communities.

Over the next 5 years, we will continue to expand our impact and grow our reach through responsive programming and key partnerships, we will develop our organizational capacity to enable and sustain that growth, and we will broaden our financial capacity to resource growth. We invite you to join us and follow our progress as we continue our journey to empower children and families, transform communities, and impact generations.

Steve Allen
CHIEF EXECUTIVE OFFICER

James Siegrist
CHIEF OPERATING
& FINANCIAL OFFICER

Tami Mitsumori-Miller
CHIEF CLINICAL OFFICER

Tiffany Tsuchiyama
CHIEF HUMAN RESOURCES OFFICER





2018-2024 Outcomes

During 2018-2024, the Agency executed on the following goals increasing Foothill Family's efforts to strengthen children and families and the systems that supported them.

PROGRAM DEPTH AND REACH

Foothill Family will continue to deepen impact and expand program services in line with community need and other opportunities through current and expanded contracting and strategic partnerships.



Secured 15 new contracts helping program revenue to grow by 49% or \$10.7 million across our four pillars: Early Childhood Development, Mental Health Services, School Based Services, and Youth and Family Services.



Strengthened outreach to underserved communities through our BASES (Building Affinity and Strength through Engagement and Services) program, engaging the African American community and connecting them with vital resources.



Navigated the statewide CalAIM Medi-Cal Reform and Payment Reform, transforming our Medi-Cal funded mental health services to a more accessible, fee-for-service structure and achieving first-year profitability.



Initiated Workforce Development efforts through Pathways to Professions and Mentored Internship Program.



Launched our first Couples Relationship Education program, Parents Invested in Relationship Success (PAIRS), a prevention-based service to ensure couples have a strong partnership on which to build effective parenting practices.



Maintained all services throughout the pandemic, quickly pivoting to virtual care in response to local health orders and expanded program offerings in response to rising community needs such as free virtual workshops for children/youth, parents, and school staff.

CONTINUOUS QUALITY IMPROVEMENT

Foothill Family will continue to ensure the delivery of high-quality services through enhanced data collection systems and utilization practices.



Achieved reaccreditation status with COA (2019, 2023) and HFA (2021) and maintained the high standards of quality that both accrediting bodies have set.



Expanded the development and meaningful use of data dashboards and analytics.



Transitioned to new Human Resource/ Payroll and Staff Survey systems to gain better tracking and reporting mechanisms.



Formalized the Agency's Performance and Quality Improvement Plan.

PEOPLE AND CAPACITY

Foothill Family will continue to attract, hire, develop, and retain high-performing staff and dedicated Board members.



Retained 78% of staff annually and achieved an Engagement Ratio (Gallup) of 18 meaning there are 18.00 engaged employees for each actively disengaged employee.



Proactively diversified the Board to 50% female (up from 32%) and increased racial and ethnic representation to 15% Black or African American, 23% Asian American, Native Hawaiian, and Pacific Islander, 27% Hispanic or Latino, and 35% White.



Hired a total of 588 new staff, promoted 58 internal promotions, with an average tenure now at 6 years.



Activated our DEI commitment with agency-wide Allyship at Work training and daily incorporation of allyship practices. Established Affinity Groups to support African American and AANHPI staff.



Provided nearly \$300,000 in student loan debt reduction to staff.

2018-2024 Outcomes



VISIBILITY

Foothill Family will establish greater community presence and visibility through relationship building, branding, and advocacy.



Launched Outdoor Campaign with large billboard and transit shelter campaign that significantly increased awareness and 20% of new employees applied to Foothill Family because of seeing the billboards.



Increased Unique Users by 129% and Web Traffic by 57%. Growth in traffic also shifted from informational pages to services we provide the community, especially Early Head Start, Mental Health Services and Virtual Clinic.



Grew social media exponentially across platforms including reach/impressions (Facebook +18,598%, Instagram +11,214%, LinkedIn +9,693%).



Created and hired, the Director of Community Engagement position boosting our community presence especially in harder to reach and/or underserved communities.



Wrapped 11 vehicles with Foothill Family branding which have served as mobile billboards/awareness for Foothill Family all throughout the San Gabriel Valley.

INFRASTRUCTURE

Foothill Family will make infrastructure and technology investments to support service delivery and promote operational efficiencies.



Transitioned to a new HR Payroll System that allowed for integration of recruiting, hiring and onboarding processes supporting a large number of field-based staff and providing managers with real-time metrics and analytics.



Opened three new service centers in Covina, Pasadena, and Pomona adding 27,000 square feet of newly remodeled office and service space in our communities utilizing design elements reflecting changing workplace patterns.



Focused on efficiencies, redundancies (cloud based), and safety and security with investments in technology and infrastructure, enabling the Agency to respond to the challenges of the pandemic transitioning within days to a 100% remote workforce, virtually serving clients and ensuring the safety of clients and staff.

SUSTAINABILITY

Foothill Family will grow and diversify revenues to support the organization's strategic direction and explore other opportunities to ensure long-term success.



Issued \$7.4 million in Tax-Exempt Revenue Bonds as part of the Agency's Facilities Master Plan, with interest rates of 3.6715% and 2.718%, enabling the purchase of new service centers in Pasadena, Covina, and Pomona, and refinancing existing loans.



Secured a Paycheck Protection Program (PPP) loan in the amount of \$3.6 million which allowed the Agency to strategically maintain and adapt service delivery during the early portion of the pandemic.



Increased reserves by \$12.3 million to \$18.4 million providing the necessary liquidity and security for the Agency and allowing for the cancellation of a backup line of credit.



Incorporated storytelling in philanthropic efforts and events and increased private support to over \$2.4 million, with corporate sponsorship revenue over \$100,000 and Board giving at 100% annually.



Grew total revenue by 54% or \$12.6 million. The DMH contract grew by over \$2 million but accounted for 37% of total revenue compared to 54% in 2018 as the Agency continues to diversify its revenue sources.



Raised over \$4 million to open and renovate the Pomona Family Center.



Launched an annual donor recognition program, The Giving Tree, to increase annual giving.



Received three six-figure gifts from a single individual donor totaling over \$1.6 million.



Strategic Planning Process

1

Planning and Preparation

Beginning in January 2024, preparatory meetings were held with the Executive Leadership Team to discuss the overall strategic planning process and schedule, establish plan priorities, and ensure staff engagement, as well as Board of Directors' representation. Subsequent meetings with Senior Leadership included a Strengths-Weaknesses-Opportunities-Challenges discussion, which informed the creation of the Strategic Plan's priority areas. Bi-weekly status meetings occurred with this group as needed between January and June 2024.

2

Board and Staff Survey

All Board members and staff were sent an online survey in late February to provide feedback. There were 93 respondents (17 Board members, 76 staff). Participants were asked to share their opinions regarding Foothill's mission fulfillment and level of success against other similar organizations. Board members were asked about their level of satisfaction with their Board experience and Foothill's provision of services. Staff members were asked questions about their experiences as an employee and their professional future with the organization. The results of the surveys are included as Appendix D in this report.

3

Task Force and Board Planning

In March 2024, 10 staff members and three Board members formed a Strategic Plan Task Force. The group held its first meeting to introduce the strategic planning process, present survey findings and refined priority areas, and outline the necessary internal and external research. The full Board also convened for a meeting to receive similar information.

4

Research – Internal and External Assessments

In addition to information collected from the Board and staff surveys, a thorough evaluation of internal and external stakeholder data was conducted. This included one-on-one interviews, focus groups, community partners survey, industry trends research, and industry benchmarking.

Internal Research

- **One-on-One Interviews - 23**
Senior Leadership and staff members, current and former Board members, donors, and Clients/Parent Policy Council members.
- **Focus Groups - 5**
Development/Corporate Relations Committee, Service Providers, Program Managers, Staffing/Staff Retention participants, and Executive and Senior Leadership.

A review of internal data was conducted including Financial and HR reporting, program cost analysis, fundraising reports, marketing and outreach collateral, staff survey results, and Foothill's most recent strategic plan.

Strategic Planning Process



External Research

- 6 Interviews with leaders from peer organizations
- 10 Community partners survey responses

Industry conditions and trends were analyzed, including finances and services of organizations of interest, staffing capacity, recruitment and retention models in social services, organizational models for growth, mergers and acquisitions, public policy and funding impacts and anticipated changes, and national data on Foothill Family's service provision areas.

5 Development and Refinement of Priority Areas, Goals, Objectives, and Strategies
All internal and external data collected were evaluated, and conclusions were drawn based on the findings. A draft of the strategic goals and objectives was then presented to the Executive Leadership Team and the task force, who were given the opportunity to provide feedback and suggest revisions. The goals and objectives were then finalized by the Executive Leadership Team.

6 Development of Final Strategic Plan

The Strategic Plan is organized in the following sections:

- **Observations:** presents the observations from the assessment process related to the critical issues addressed.
- **Strategic Goals and Objectives:** provide overarching goals and objectives that will guide Foothill Family over the next five years.

Using preliminary suggestions, Foothill Family leadership will adapt and implement the strategies the organization will pursue to fulfill the strategic plan's goals and objectives. Appendices A-D provide a toolbox for Foothill Family to guide this process.

As the Strategic Plan is designed as a roadmap for Foothill Family over the next five years, it is important to consistently monitor progress and update the plan to reflect changing circumstances and new challenges or opportunities. It is encouraged that all members of the Board of Directors and staff to become familiar with the Strategic Plan and act rigorously in holding one another accountable for systematic implementation. A Committee Best Practices is included in this plan as Appendix C. This tool can be a guide of how the different committees of the Board can take ownership in monitoring the progress of relevant strategic plan goals, objectives, and strategies.

“
As we look to grow, (the Agency) needs to have a good rationale for why we are going to grow in one program or geographic area over another. Diversification) is a strength of ours, and we need to continue to be smart with our decision-making.

”

Foothill Family Guiding Principles

FOOTHILL FAMILY

core values

QUALITY

Foothill Family strives to provide the highest quality of service to ensure each individual and family is given a genuine opportunity to pursue and achieve healing and growth.

DIGNITY

Foothill Family understands and honors personal dignity at the forefront of each individual's road to success.

DIVERSITY

Foothill Family embraces and celebrates diversity, in its many forms, within all aspects of who we are, who we serve, and how we care for our communities.

EMPOWERMENT

Foothill Family empowers individuals and families to embark on healthy journeys toward personal development and self-sufficiency.

FAMILY

Foothill Family believes thriving families strengthen communities and provide the foundation for every child's bright future. It all starts with family.

GENERATIONAL

Foothill Family promotes long-term change that starts now and will ripple outward into the community and forward through future generations.

Foothill Family's mission and vision remain unchanged, but the wording has been revised for improved readability and marketability. The new wording allows for ease of use by staff and Board members when speaking about Foothill's work as a whole.

ROOTED IN

our mission

Foothill Family empowers children and families on their journey to achieve personal success.

REACHING FOR

our vision

Foothill Family envisions generations of healthy families and thriving communities.





Foothill Family
Strategic
Plan
2024-2029





Strategic Plan 2024-2029

Priority Areas Overview



Build Capacity to Support Growth

Foothill Family has a clear vision of expanding the organization to a \$50 million entity. Achieving this ambitious goal necessitates several strategic changes to the current operational structure. This priority area hinges on the efficient and effective implementation of programs and contracts, the managerial and administrative support required for optimal operations, and the human resource and service capacity to sustain the envisioned growth.



Financial Sustainability and Efficiency

Program growth is deeply ingrained in the culture of Foothill Family. In the last 10 years alone, the organization has grown revenue by \$16.2 million (83%). With the Agency's goal of growing to a budget of \$50 million over the course of this strategic plan, Foothill Family must focus on both optimizing efficiency and expanding into new funding avenues through strategic program expansion to ensure long term sustainability and success serving the community.



Retain and Develop Talent Pool

Maintaining consistent and high-performing staff is vital to Foothill Family's ability to meet the demonstrated need in the greater Los Angeles region. Staff at Foothill Family are mission-driven and identify the personally rewarding nature of the work as one of the top reasons they enjoy working at the organization. Staff members overwhelmingly believe Foothill Family offers an engaging and welcoming work environment and believe they are supported in their professional growth.

In order to retain and develop the necessary talent pool that will achieve the Agency's ambitious growth targets, the Agency will need to redefine staffing and staffing development models.



Enhance Philanthropic Practices

As Foothill Family investigates program expansion, philanthropic support must expand in tandem. At present, fundraising accounts for approximately 6% of Foothill Family's budget or around \$2.5 million annually. As the organization reaches its \$50 million revenue goal, the philanthropic support goal to reach \$4 million annually by Year 5 is in alignment with the current trajectory of donor growth and stewardship mindset. This will be achieved through strategic stewardship, expanded donor engagement, the acquisition of new donors and partners, and leveraging the Board's philanthropic role.

Priority Area Observations

Build Capacity to Support Growth

Evaluating Efficiency in Programs and Contracts



Efficiency

It is important for Foothill to ensure each contract not only supports program costs but also covers the administrative support necessary for successful implementation and management. Foothill currently assesses efficiency by examining the cost per client and profitability. Moving forward, pursuing new contracts that are of an adequate size and length of term to ensure coverage of costs and stability will be key. This allows us to achieve efficiencies and adequately cover administrative burdens. As Foothill expands, strategies should support Foothill Family's mission and a continuation of understanding the full cost of programming.



Sustainability

As resource and capacity limitations arise, Foothill should evaluate its ability to sustain certain programs based on the current funding model, available revenue streams, and staff capacity. Additionally, the organization should assess if the community's needs are being met through other available resources. This comprehensive approach will help in making informed decisions about program viability.



Performance

Foothill Family believes that identifying Key Performance Indicators (KPIs) will be essential for continuous improvement and data driven decision-making. Contracts typically come with caseload or productivity standards that set staffing and performance levels. Currently, there are limited financial incentives for overall efficiency due to these preset contract standards. However, introducing internal metrics could further optimize performance and inform resource allocation. These KPIs will provide a clear framework for measuring success and identifying areas that are the best fit for expansion.

“

Foothill Family prides itself on being adaptable toward the needs of the community. Any evaluation of programming should be centered on providing the best services for our clients.

”



Priority Area Observations

Build Capacity to Support Growth



Management and Administrative Support



Organizational Structure

Internal feedback has been positive regarding the organizational structure aligned with program services (pillar structures) rather than geography. This appears to be a consistently successful organizational structure in other agencies. As the Agency expands, this structure needs to adapt and flex to meet evolving demands.



Managerial Empowerment

Assigning responsibilities is crucial for managers to operate at their full capacity. Foothill Family should develop managers' skills, refine job roles, elevate responsibilities, and assess staffing needs. This approach enables decision-making at the right level, allowing senior staff to focus on strategic tasks, ensuring decisions align with job roles, and supporting effective execution of plans and program delivery.



Innovation Incubator

Other organizations have established Business Growth and Innovation Teams to serve as incubators for new programming, operating outside traditional contract parameters and fostering innovation within the organization. Further developing management skills at all levels will allow Foothill Family's Senior Leadership to focus on strategic initiatives and innovations.

Human Resource and Service Capacity



Skill Expansion

As Foothill's budget grows, employees must develop new skills to manage expanding programs effectively. To ensure the organization can meet its obligations, staff capacity should be evaluated before taking on new contracts.



Strategic Staffing

One way to build capacity is by exploring alternative staffing structures. Currently, Foothill Family doesn't routinely outsource or use non-traditional work schedules. A systematic resource plan could include alternative schedules, part-time employees, contractors, and outsourcing for new programs. Outsourcing is especially useful during rapid growth and in non-strategic areas, helping to mitigate the risk of staff turnover or periods of high demand.

Priority Area Observations

Financial Sustainability and Efficiency

Strategic Program Expansion



Geographic Expansion

Foothill Family is expanding its programming in SPA 7, starting with the Family Preservation Grant in Santa Fe Springs. Aligned with the principle “Foothill Family puts its arms around the whole family,” expansion will focus on multi-generational services, including insurance contracts, youth mentoring, older adults, Early Head Start, and workforce development. With 60% of community partners identifying mental health care as the biggest unmet need, the Agency should strategically incorporate mental health support in new contracts.



Community Capacity Expansion

To maximize impact, Foothill Family will also train other community organizations in evidence-based practices, enhancing community capacity, raising visibility, and establishing itself as a leader in service areas.

Budgeting and Financial Sustainability



Strategic Contracts

Government contracts, while essential for funding, often don't cover full service costs and are administratively complex. With 85% of Foothill Family's revenue coming from these contracts, the Agency strategically accepts that some programs may operate at a loss, typically between \$10,000 and \$20,000, with losses varying year to year based on funding cycles. These losses are usually offset by investment returns and fundraising.



Program Profitability

Foothill aims to make up to 50% of services profitable by expanding fee-for-service and non-government contracts, such as through the new Private Pay program, which also helps retain licensed therapists. Surpluses from contracts like Enhanced Care Management (ECM) could fund program expansions.



Expand Unrestricted Funds

Foothill's restricted private funds are heavily focused on grant funding that often require changes to programming to meet the funding requirements. To reduce reliance on these, Foothill plans to expand unrestricted funds through increased fundraising and non-government contracts.





Priority Area Observations

Retain and Develop Talent Pool



Staffing and Compensation



Competition for Talent

The turnover among licensed therapists in community mental health is a common challenge, influenced by salary levels and expanding opportunities. Similar issues affect Case Management and Early Childhood Development roles, exacerbated by a tight post-pandemic labor market. After a 27% turnover in 2022, Foothill retained 77% of staff in 2023 (23% turnover). However, filling positions has become more difficult, with the average time to fill roles increasing from 74 days in 2022 to 83 days in 2023. Hiring remains a challenge, especially with planned growth.

Top reasons U.S. workers left a job in 2021: Low pay, no advancement opportunities

	Major reason	Minor reason
Pay was too low	37	26
No opportunities for advancement	33	30
Felt disrespected at work	35	21
Because of child care issues	24	24
Not enough schedule flexibility	24	21
Benefits weren't good	23	20
Wanted to relocate	22	13
Working too many hours	20	19
Working too few hours	16	14
Employer required a COVID-19 vaccine	8	10

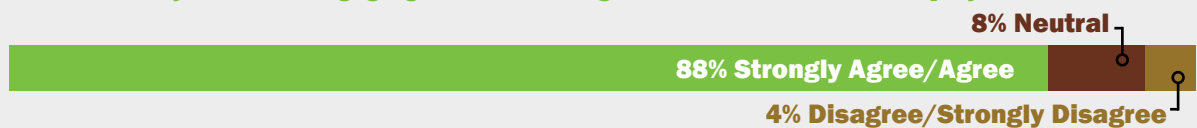
*Source: Survey of U.S. adults conducted Feb 7-13, 2022, Pew Research Center



National Turnover Trends

Over the past six years, Foothill Family has maintained a 78% average retention rate, with turnover below the national average. Foothill's salaries are competitive with similar organizations. In 2023, 47% of staff who left did so for higher pay and career advancement, reflecting a national trend. A 2023 survey by the Society for Human Resource Management found inadequate compensation, lack of career advancement, and lack of workplace flexibility as the top reasons for turnover.

Foothill Family offers an engaging and welcoming work environment for employees.



“

If we are going to grow programs, it is vital that we hire dedicated individuals in (support) roles to adequately manage the organization's administrative needs. As we expand, we should ask, 'Do we have the staff available to support the expanded workload?'"

”

Priority Area Observations

Retain and Develop Talent Pool

Staffing and Compensation *Continued*



Perception Gaps

Due to funding limits and program requirements, there are compensation variations across some positions at Foothill Family, leading to misperceptions about pay equity. Despite this, Foothill remains competitive in hiring and offering salaries within the nonprofit sector.



Work-Life Balance

To compete with higher-paying for-profit organizations, hospitals, and school districts, Foothill should highlight its unique benefits, including superior work-life balance. While 94% of staff who left in 2023 were satisfied with benefits, managers need better skills to communicate these advantages, which could improve recruitment and retention.



Engagement Focus

Amid a tight labor market, Foothill should focus on engagement as a key retention strategy. With an engagement score of 18 to 1, the Agency should continue to develop approaches that enhance meaningful engagement at all levels.



Generational Shifts

As the workforce's generational makeup changes, Foothill must address recruitment and retention strategies, considering generational differences in compensation and work-life balance priorities. Diversity is crucial, and the workforce should reflect the communities served, with an emphasis on inclusion at all levels.



Diversity, Equity and Inclusion

Diversity was identified as an area of importance across the Agency and specifically diversity that matches the communities served and will be served. The diverse workforce should ideally be reflected in the make-up of management so that everyone will feel more supported by the organization and will have more confidence seeing this diversity reflected at all levels. Creating a culture of inclusion was also identified as a top priority for Foothill. Foothill should continue its efforts to proactively recruit diverse staff, amplify the voices of their diverse workforce, and nurture an inclusive and representative organizational culture.

Foothill Family Workforce by Generation

40% Millennials (1981-1994)

29% Generation X (1965-1980)

24% Generation Z (1995-2010)

7% Baby Boomers (1946-1964)



Priority Area Observations

“
The employee-centric nature of Foothill Family is one of the things that makes it so special. This sets us up to keep quality people in a sector where it is difficult to retain people.
 ”

Retain and Develop Talent Pool

Career Development



Career Growth Pathways

Foothill Family is committed to training future professionals and retaining current talent. The Agency has clear career ladders and should formalize how supervisors engage in growth discussions to enhance career development and transparency. Expanding skill development and mentorship will keep roles dynamic and employees engaged.

My immediate supervisor supports my professional growth



Management Skills



Nurturing Talent

Staff believe Foothill offers adequate professional development, education, and career support, but further support for managers in integrating career growth into their management style could be beneficial.

Managers need to strengthen their ability to nurture supervisee growth, helping them excel in their roles and produce high-quality outcomes. Developing skills in effective engagement and understanding the manager’s role in talent retention are key areas for growth.

I receive helpful feedback on my work performance



Priority Area Observations

Enhance Philanthropic Practices Strategic Stewardship



Philanthropic Cultivation

Foothill can enhance its fundraising efforts by creating a yearly philanthropic plan with specific contact targets, strategies, metrics, and goals. With events being key to donor cultivation, Development staff, Leadership, and Board members should maximize these opportunities. Structured cultivation practices and a stable Development team will ensure consistent donor engagement despite turnover.

Expanding Current Donor Engagement



Donor Pipeline Expansion

Foothill has untapped potential among stakeholder groups, especially Friends of Foothill, to convert them into major donors. Identifying and cultivating members with capacity and interest will strengthen the donor pipeline.



Planned Giving

Foothill's Planned Giving Program is seen as a standalone request rather than an ongoing engagement, limiting its effectiveness. Hiring experienced counsel could establish a stronger program, while expanding corporate and annual fund giving presents additional opportunities.



Foundation Partnerships

Foundations currently account for 50% of Foothill's fundraising. As the organization grows, it should seek partnerships with larger national foundations aligned with its mission.

“

We have a strong body of supporters to pull from but need to focus more on process and data-driven opportunities to grow fundraising.

”



Priority Area Observations

“

Board members have strong contacts and reach within the community. We should be more proactive about following through with these relationships.

”

Enhance Philanthropic Practices



Philanthropic Role of the Board



Reputation of Excellence

The Foothill Family Board of Directors strongly supports the organization, viewing it as a top service provider in Los Angeles. All surveyed Board members rated Foothill Family’s community reputation as excellent or good, with 88% considering it superior to similar organizations. When asked to compare Foothill Family to other similar organizations, Board members who responded rated Foothill Family Far Superior (29%) or Superior (59%).



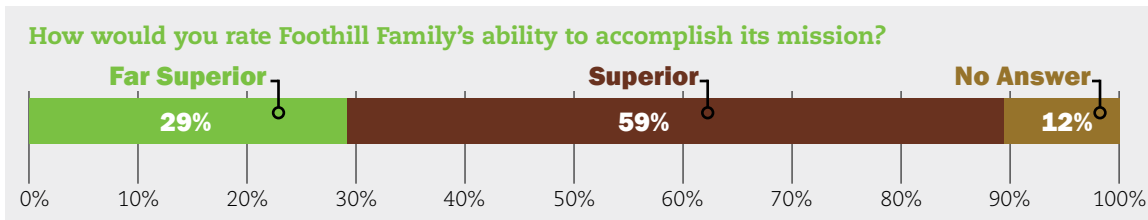
Untapped Support

Foothill Family’s Board has a minimum annual giving commitment of \$1,500, but the average gift in 2023 was \$5,000, with uneven participation. Board members are encouraged to connect Foothill with potential donors, including individuals, corporations, and foundations.



Board Expectations

To maximize Board support, Foothill needs to nurture a culture of philanthropy, clarify roles, and set clear expectations. A formalized cultivation plan with specific metrics will help achieve these goals.



Strategic Plan

Goals & Objectives





Goals & Objectives Overview

From its founding in 1926, Foothill Family has continuously evolved to meet the changing needs of its communities. Today, as we serve thousands across Southern California, our 5-Year Strategic Plan positions us to embrace new opportunities and address emerging landscapes. This forward-thinking plan prioritizes expanding programs, building internal capacity, and fortifying financial stability to ensure lasting impact.

goal ONE



EXPAND IMPACT AND GROW REACH of programs and partnerships

1.A

Inform
stakeholders of **important shifts**, events, and **achievements** in execution of our **mission**.

1.B

Systematize
a business **growth** and **innovation** mindset and processes to assess new opportunities, partnerships, and acquisitions.

1.C

Secure
new business on current service offerings, expanded geographies, and peripheral lines.

1.D

Enhance
and use **visibility** in support of program **growth** and **reach**.

goal TWO



DEVELOP ORGANIZATIONAL CAPACITY to enable growth

2.A

Grow
workforce through **innovative hiring** practices and staff **engagement**.

2.B

Authenticate
the **Agency's identity** as a Training Institute.

2.C

Communicate
and launch a staff development model that includes **career ladders** and **career tracks**.

2.D

Identify
a pathway to a **scalable** and **efficient** management **structure** to utilize staff at the top of their **expertise**.

2.E

Implement
a **responsive** structure for alternative staffing, **non-traditional** schedules and use of external resources.

2.F

Adopt
data driven decision-making, a **culture** of feedback, and continuous **improvement**.

2.G

Leverage
technology to increase operational **efficiency** and service **efficacy**.

2.H

Regulate
facilities **planning** to cost effectively support agency **growth**.

2.I

Enhance
Board operations and **governance** through Board member skill **development** and **education**.

Goals & Objectives Overview



goal THREE

} INCREASE AND DIVERSIFY
FINANCIAL CAPACITY
to resource growth

3.A

Fund

innovations and new business development in support of program growth and operational efficiency.

3.B

Grow

profitable revenue as a percentage of total revenue.

3.C

Materially Grow

philanthropic support through stewardship and donor acquisition to enable program growth.

3.D

Foster

a process-driven culture of philanthropy that is transparent, performance-based, and scalable.

3.E

Formalize

philanthropic role and responsibilities of Board members.

3.F

Establish

organization-wide expertise in managing profitability of programs.

3.G

Implement

decision-making tool for the reinvestment of budget surpluses into sustainable growth and reserves.

3.H

Build

an effective volunteer model as a new donor cultivation tool.





Goals & Objectives

The following are strategies developed to achieve identified priority objectives.

Goal 1: Strategies

Expand Impact and Grow Reach of Programs and Partnerships

OBJECTIVES

STRATEGIES

1.A

Inform

stakeholders of **important shifts**, events, and **achievements** in execution of our **mission**.

- Utilize monthly and quarterly meetings to share updates and resources to internal and external stakeholders.
- Evaluate the need for external marketing resources to amplify the Agency's voice.
- Leverage marketing and communication strategies to shape and respond to significant shifts in program and program funding.

1.B

Systematize

a business **growth** and **innovation** mindset and processes to assess new opportunities, partnerships, and acquisitions.

- Hold high-level meetings to discuss structure necessary to support business innovations and operationalize initial efforts.
- Solidify and document a clear picture of what the Agency will need to look like in five years in terms of staffing and resources and develop a plan to utilize natural transitions to further progress towards this vision.

1.C

Secure

new business on current service offerings, expanded geographies, and peripheral lines.

- Evaluate business development and implementation resources.
- Successful expansion into new geographic service areas.
- Broaden research capacity to identify current and future funding opportunities.
- Market the School Wellness Initiative Services (SWIS) program to key school districts to promote school-wide Tier 1 and Tier 2 support services.
- Expand EHS services into SPA 7 by first initiating Home-Based services at partner locations, and if EHS expansion grant funds allow, launching Child Care Partnership services.

1.D

Enhance

and use **visibility** in support of program **growth** and **reach**.

- Equip all staff with high-level talking points to represent Foothill Family as spokespersons effectively.
- Focus philanthropic messaging on Foothill Family's longevity and results.
- Leverage milestones, anniversaries, and expansion events to communicate to a broader audience.

Goals & Objectives

Goal 2: Strategies

Develop Organizational Capacity to Enable Growth



OBJECTIVES

STRATEGIES

2.A

Grow

workforce through **innovative hiring** practices and staff **engagement**.

- Create messaging and branding of working at Foothill Family.
- Develop a standardized hiring process (number of interviews, timeline, hiring team) across all sites and service areas.
- Implement formal training for hiring managers in interview skills and talking points regarding the benefits of working at Foothill.
- More active solicitation job fairs including using client recruitment events, out-of-area, campus recruiting, and on-site hiring.
- Culture shift for Managers including screening out not in, fluidity between locations, and changing role in hiring process.

2.B

Authenticate

the **Agency's identity** as a Training Institute.

- Formalize intern/pre-licensed/licensed/two-year post licensed therapist career pathways including what career growth and trajectory looks like.
- Hire Training Manager with expertise in adult learning and presentation technology.
- Develop administrative internship program.
- Expand the overall intern count in program and administration.

2.C

Communicate

and launch a staff development model that includes **career ladders** and **career tracks**.

- Formalize the process to communicate career ladders across the organization to help employees better understand their potential future at Foothill and enhance employees' awareness of growth opportunities.
- Implement dedicated career discussions with staff.
- Expand career development to include skill-based learnings and skills enhancement, in addition to targeted training for promotional growth.

2.D

Identify

a pathway to a **scalable** and **efficient** management **structure** to utilize staff at the top of their **expertise**.

- Review DMH Clinical Managers responsibilities to determine if administrative and clinical responsibilities can be separated to allow individuals to operate at the top of their capacity.
- Expand support services such as data analysis and contract management.



Goals & Objectives

Goal 2: Strategies

Develop Organizational Capacity to Enable Growth

OBJECTIVES

STRATEGIES

2.E

Implement

a **responsive** structure for alternative staffing, **non-traditional** schedules and use of external resources.

- Develop a decision-making tool and process to evaluate contracting versus hiring.
- Determine optimal mix of staffing types (full-time, part-time, seasonal, temp, outsourcing, partnering, weekends, off times/ after hours, remote staffing).
- Identify and assess opportunities for alternative staffing and utilization of external resources.
- Conduct a process audit to identify potential cultural and systems barriers for implementing and managing alternative staffing.

2.F

Adopt

data driven decision-making, a **culture** of feedback, and continuous **improvement**.

- Define what a culture of feedback will look like at the Agency.
- Train managers on giving and receiving feedback and holding honest conversations.
- Empower managers with greater oversight and decision-making authority.
- Establish KPIs at Board, Executive, Management, Program Management levels to monitor progress towards goals, objectives, and strategies.
- Utilize dashboards for reporting KPIs on a daily, weekly, monthly, quarterly, and annual basis.
- Enhance staff data familiarity, adopt utilization of data reporting, and informed decision making.
- Identify resource plan necessary for successful implementation of data-driven decision making.
- Streamline reporting by eliminating low-value, high-effort activities to focus on advanced analytics.
- Implement the Strategic Plan with ongoing reporting, evaluation, and annual strategy reviews.

2.G

Leverage

technology to increase operational **efficiency** and service **efficacy**.

- Identify technology and system needs for potential program expansion planning and alternative staffing models.
- Refresh technology to allow for focus on efficiencies.
- Conduct staff technology survey to identify opportunities for efficiencies.
- Identify technology advancements and trends that have the potential to impact service delivery and/or efficiencies.
- Create opportunities to broaden our understanding of technological innovation and change in our industry.

Goals & Objectives

Goal 2: Strategies

Develop Organizational Capacity to Enable Growth



OBJECTIVES

STRATEGIES

2.H

Regulate

facilities **planning** to cost effectively support agency **growth**.

- Identify and secure short-term and long-term facility needs necessary for geographic expansion.
- Proactive planning around office lease renewal and identification of administrative location(s) specifics.
- Build toward capital campaign expectations.

2.I

Enhance

Board operations and **governance** through Board member skill **development** and **education**.

- Board Committees to review committee charters, bylaws, and meeting operations.
- Provide Board educational opportunities around service areas tied to already scheduled quarterly meetings and reimagine Board orientation training on an annual cycle.
- Report to Board annually on goals and objectives of five-year strategic plan.
- Utilize Chart of Work tools to organize Board review of strategic planning.
- Need to clarify Board role/purpose/member types, diversity vs. skill, skill development.
- Evaluate number and scope of committees (i.e. expanded Program Committee, separate Corporate Development Committee).



Goals & Objectives

Goal 3: Strategies

Increase and Diversify Financial Capacity to Resource Growth

OBJECTIVES

STRATEGIES

3.A

Fund innovations and new business development in support of program **growth** and operational efficiency.

- Develop organization-wide KPIs as a measurement tool to evaluate capacity for growth.
- Utilize one-time funding to fully implement CRM (salesforce and staffing) to support an expansion of ECM.
- Identify financial resources to convert to paid internships with the planned ending of the MIP Program.

3.B

Grow profitable revenue as a percentage of total revenue.

- Expand programs (i.e. ECM, fee for service, etc.) that provide profit to the organization.
- Develop decision-making tool and budgeting priorities to determine usage of revenues from profitable programs to support innovation and business development.

3.C

Materially Grow philanthropic support through **stewardship** and **donor acquisition** to enable program growth.

- Leverage innovation to seek grants from private foundations who have previously viewed Foothill Family as fully resourced.
- Engage with lapsed donors, utilizing upcoming celebrations, to encourage a renewed giving relationship.
- Expand donor geographic footprint beyond Pasadena/SGV.
- Develop Friends of Foothill with a more intentional engagement plan for members in support of the Agency's mission.
- Validate and communicate philanthropic data and optimize database utilization.

3.D

Foster a process-driven **culture of philanthropy** that is transparent, performance-based, and **scalable**.

- Create data and metrics-driven annual philanthropic plan.
- Develop annual philanthropic projections for the next 5 years.
- Cultivate donor relationships and formalize stewardship engagements by matching staff to specific donors.
- Develop and execute a robust Major Gifts program.
- Execute and grow the Legacy and Giving Society (Planned Giving).

Goals & Objectives

Goal 3: Strategies

Increase and Diversify Financial Capacity to Resource Growth



OBJECTIVES	STRATEGIES
<p>3.E</p> <p>Formalize philanthropic role and responsibilities of Board members.</p>	<ul style="list-style-type: none">• Equip all Board members with high-level talking points to represent Foothill Family as spokespersons effectively utilizing storytelling training.• Focus philanthropic messaging on Foothill Family's longevity and results.• Expand Board engagement in philanthropy beyond personal giving.• Systematize a process for Board introductions to their business and personal networks to drive support for Foothill's mission.• Develop plan to engage Board in peer-to-peer fundraising conversations and establish Board mentorship to facilitate philanthropic conversations.
<p>3.F</p> <p>Establish organization-wide expertise in managing profitability of programs.</p>	<ul style="list-style-type: none">• Collaborate with Program Managers to set targets beyond break-even/profitability, provide tools to develop fiscal aptitude, as Managers take on greater oversight and decision-making authority.• Enhance staff data familiarity, adopt utilization of data reporting, and informed decision making.• Establish and monitor KPIs around profitability of programs in pursuit of our strategic plan goals.
<p>3.G</p> <p>Implement decision-making tool for the reinvestment of budget surpluses into sustainable growth and reserves.</p>	<ul style="list-style-type: none">• Formalize investment criteria for new projects, enhancements, and innovations.• Establish management knowledge of annual reserve targets appropriate to the Agency's projected larger size and DMH repayments plan in context of budgeting and planning.
<p>3.H</p> <p>Build an effective volunteer model as a new donor cultivation tool.</p>	<ul style="list-style-type: none">• Complete audit of current volunteer opportunities for donors and identify the feasibility of creating additional opportunities.• Explore new services that provide opportunities for volunteer engagement such as basic needs support services.



By **working** together, **dreaming** together, and **growing** together we will achieve our **5-Year** strategic plan to deliver **\$50 million** in annual crucial services, provided by our **500 employees** to fulfill our Agency mission and bring us closer to the future we envision.





Appendices



Appendix A:

Cross Functional Focus Areas

To achieve the ambitious goals outlined in Foothill Family's 2024-2029 Strategic Plan, we will leverage the strength of cross-functional teams designed to foster collaboration, innovation, and efficiency. These teams will be organized around key strategic priorities. By bringing together diverse expertise from across the organization, we will harness collective insights, drive progress, and ensure a holistic approach to implementing our goals and objectives. This collaborative framework will be essential in advancing our mission, expanding our reach, and sustaining long-term impact for the communities we serve.

Growth and Innovation

Focus on strategies about resourcing new business and institutionalizing innovative programming.

Marketing, Communications, and Outreach

Focus on strategies about internal and external messaging about Foothill, its current successes, and its plans for the future.

Culture of Philanthropy

Focus on strategies about increasing philanthropic support from external stakeholders and institutionalizing philanthropy at Foothill.

Capacity for Growth

Focus on strategies about building more capacity in programs, staffing structures, and infrastructure to allow for growth.

Recruitment and Retention

Focus on strategies to impact staff recruitment, retention, and career development to ensure staffing capacity for growth.

Evaluation and Tracking

Focus on strategies to evaluate and track organizational decisions and outcomes both within the Agency and with the Board.

Final Review

Executive Leadership Team synthesizes overlapping strategies between workgroups and finalizes one matrix for the whole plan.



Appendix B:

Goals & Objectives By Cross Functional Focus Areas

Growth and Innovation Workgroup

1.B

Systematize

a business **growth** and **innovation** mindset and processes to assess new opportunities, partnerships, and acquisitions.

1.G

Secure

new business on current service offerings, expanded geographies, and peripheral lines.

3.A

Fund

innovations and **new business** development in support of program **growth** and operational **efficiency**.

3.B

Grow

profitable revenue as a percentage of total revenue.

3.C

Materially Grow

philanthropic support through **stewardship** and **donor acquisition** to enable program **growth**.

3.H

Build

an effective **volunteer** model as a **new donor** cultivation tool.

Marketing, Communications, and Outreach Workgroup

1.A

Inform

stakeholders of **important shifts**, events, and **achievements** in execution of our **mission**.

1.D

Enhance

and use **visibility** in support of program **growth** and **reach**.

3.E

Formalize

philanthropic role and **responsibilities** of Board members.

Recruitment and Retention Workgroup

2.A

Grow

workforce through **innovative hiring** practices and staff **engagement**.

2.B

Authenticate

the **Agency's identity** as a Training Institute.

2.C

Communicate

and launch a staff development model that includes **career ladders** and **career tracks**.

2.D

Identify

a pathway to a **scalable** and **efficient** management **structure** to utilize staff at the top of their **expertise**.

2.E

Implement

a **responsive** structure for alternative staffing, **non-traditional** schedules and use of external resources.



Appendix B:

Goals & Objectives By Cross Functional Focus Areas

Culture of Philanthropy Workgroup

<p>3.C</p> <p>Materially Grow philanthropic support through stewardship and donor acquisition to enable program growth.</p>	<p>3.D</p> <p>Foster a process-driven culture of philanthropy that is transparent, performance-based, and scalable.</p>	<p>3.E</p> <p>Formalize philanthropic role and responsibilities of Board members.</p>	<p>3.H</p> <p>Build an effective volunteer model as a new donor cultivation tool.</p>
<p>1.C</p> <p>Secure new business on current service offerings, expanded geographies, and peripheral lines.</p>	<p>2.D</p> <p>Identify a pathway to a scalable and efficient management structure to utilize staff at the top of their expertise.</p>	<p>2.E</p> <p>Implement a responsive structure for alternative staffing, non-traditional schedules and use of external resources.</p>	<p>2.G</p> <p>Leverage technology to increase operational efficiency and service efficacy.</p>
<p>2.H</p> <p>Regulate facilities planning to cost effectively support agency growth.</p>	<p>2.I</p> <p>Enhance Board operations and governance through Board member skill development and education.</p>		

Evaluation and Tracking Workgroup

<p>2.F</p> <p>Adopt data driven decision-making, a culture of feedback, and continuous improvement.</p>	<p>2.I</p> <p>Enhance Board operations and governance through Board member skill development and education.</p>	<p>3.F</p> <p>Establish organization-wide expertise in managing profitability of programs.</p>	<p>3.G</p> <p>Implement decision-making tool for the reinvestment of budget surpluses into sustainable growth and reserves.</p>
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Appendix C:

Board Committee Monitoring

Quarterly committee meetings will include:

- Introducing or advancing a discussion regarding a meaningful topic related to select strategic objectives relevant for Board review.
- An opportunity for committee members to help in a meaningful way.
- Oversight in the form of reporting.

Recommended committees to review selected objectives:

Executive Committee

1.B
Systematize
 a business **growth** and **innovation** mindset and processes to assess new opportunities, partnerships, and acquisitions.

1.C
Secure
 new **business** on current service offerings, expanded geographies, and peripheral lines.

3.A
Fund
 innovations and new **business** development in support of program **growth** and operational **efficiency**.

3.B
Grow
 profitable **revenue** as a percentage of total revenue.

Board Affairs Committee

2.I
Enhance
 Board operations and **governance** through Board member skill **development** and **education**.

3.G
Implement
 decision-making tool for the **reinvestment** of budget surpluses into **sustainable growth** and **reserves**.

Outreach and Community Engagement Committee

1.A
Inform
 stakeholders of **important shifts**, events, and **achievements** in execution of our **mission**.

1.D
Enhance
 and use **visibility** in support of program **growth** and **reach**.

3.H
Build
 an effective **volunteer** model as a **new donor** cultivation tool.

Development Committee

3.C
Materially Grow
 philanthropic support through **stewardship** and **donor acquisition** to enable program **growth**.

3.D
Foster
 a process-driven **culture of philanthropy** that is transparent, performance-based, and **scalable**.

3.E
Formalize
 philanthropic role and **responsibilities** of Board members.

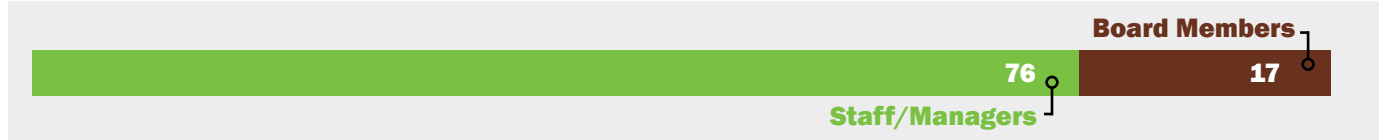


Appendix D:

Research Results

Completed Survey Responses

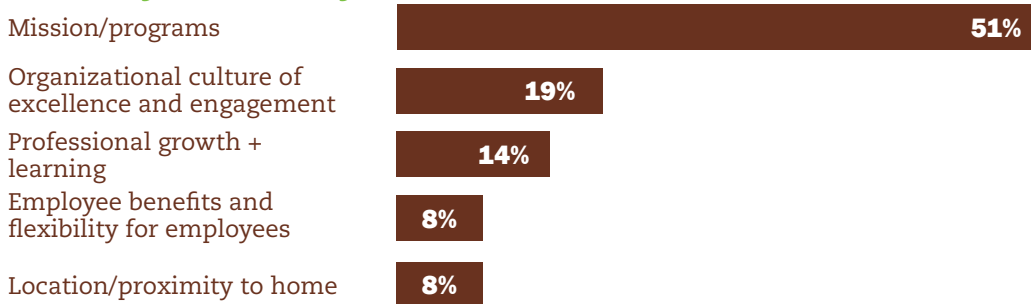
Staff and Board Surveys were open 2/21/24 to 3/11/24



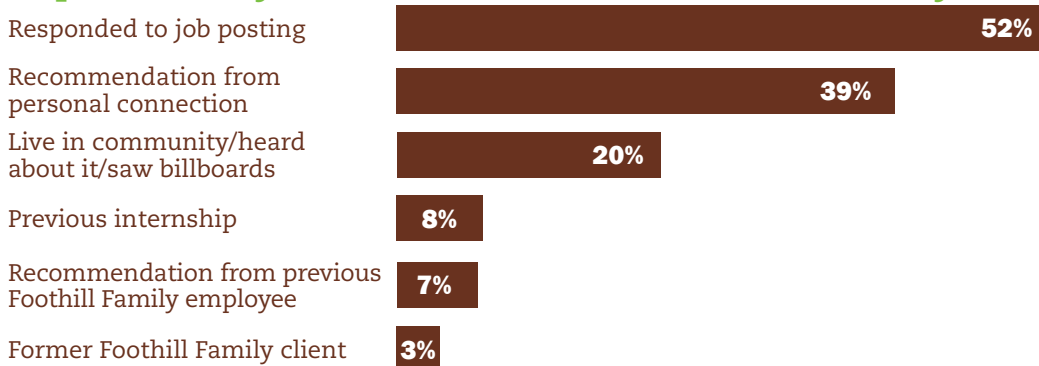
Primary reasons you serve as a **Board** member



Primary reasons you serve as a **Staff** member



Top reasons you came to work at Foothill Family



Appendix D:

Research Results

Rate your level of agreement matrix

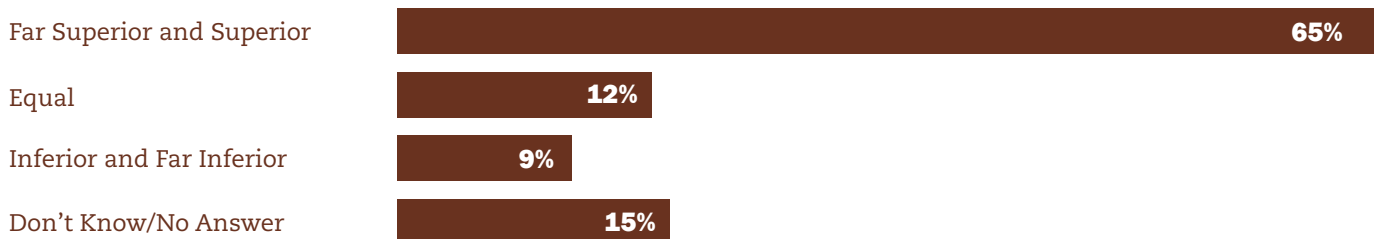
(weighted average out of 4.0 – a higher number indicates a higher level of agreement):

Comparing Foothill Family to other similar/like organizations, how would you rate its ability to accomplish its mission?

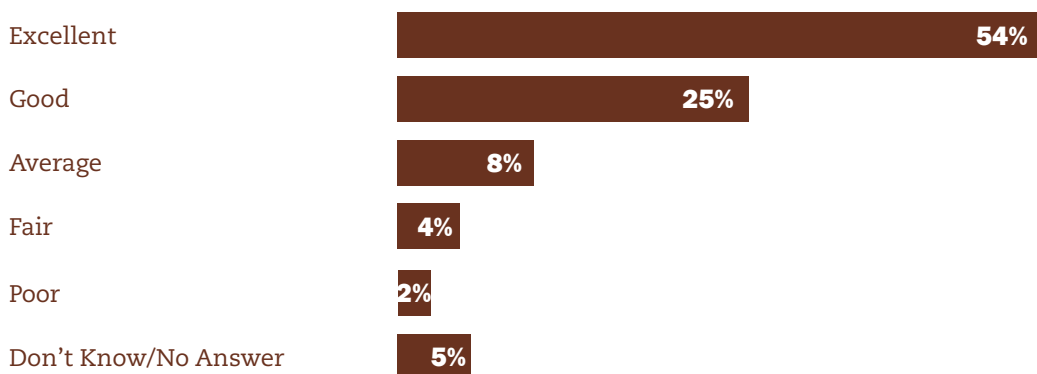


Organizational Perceptions (Board and Staff)

Comparing Foothill Family to other similar/like organizations, how would you rate its ability to accomplish its mission?



Foothill Family's reputation/image in the community is





Appendix D: Research Results

Board Only

I feel confident in communicating the mission and vision of Foothill Family to the community.



Foothill Family actively engages the community in philanthropic efforts (i.e. fundraising, volunteering, etc.).



The vision, beliefs, and core values of Foothill Family create a unified message for our continued success and growth as an organization.



Foothill Family offers an engaging and welcoming experience to all families



Foothill Family is a recognized leader in social services for children and families in the Greater Los Angeles region.



Foothill Family programs support individuals and families in all service areas: early childhood development, mental health care, school-based services, and youth and family services.



Foothill Family is an excellent steward of fiscal resources.



I have had a positive experience as a Board member for Foothill Family.



Staff Only

Rate your agreement with the following statements (matrix)

The mission statement for Foothill Family is clearly articulated to employees and members of our community.



The vision, beliefs, and core values of Foothill Family create a unified message for our success and growth.



There is regular collaboration across programs and departments that allow employees to enhance the experience for community members.



Employee feedback and recommendations are considered when evaluating programs and services provided by Foothill Family.



Foothill Family provides staff with the necessary resources and provides adequate upkeep with facilities.



Appendix D:

Interviews

Interviewees

Vanessa Wolf Alexander
Steve Allen
Christopher Aponte-Iniesta
Laurel Bear
Mike Beckman
Meg Bennett
Tameka Brown
Mike Buchanan
Maria Cervantes
Chris Howard
Patti Johnson
Lindsey Lansburgh
Anita Lawler
Lara Lund
Guadalupe Mena
Tami Mitsumori-Miller
Maria Muniz
Julietta Perez
Jim Siegrist
Alejandra Solano
Jil Stark
Chuck Tapert
Sheila Thornton
Tiffany Tsuchiyama

Focus Group Participants

Vanessa Wolf Alexander
Steve Allen
George Angelow
Ivan Bustamante
Daneta Calderon-Vital
Wendy Castro
Adrienne Cervantes
Anai Esteban
Stefani Freeburg
Moises Galva
Christina Gamboa
Edgar Garcia-Mora
Lisette Gavina Lopez
Angie Groom
Jon Hernandez
Lizette Jimenez
Lindsey Lansburgh
Chang Liu
Diana Llamas
Claudia Lopez
Debbie Martinez
Jennifer Martinez
Eliut Moreno
Graciela Mujica
Zenia Orellana
Christina Santillan
Jim Siegrist
Dustin Soukhaseum
Alma Stansbury
Chuck Tapert

Industry Conversations

Wendy Carpenter
Penny Lane Centers
Charlene Dimas-Peinado
Wellnest
Justine Lawrence
Children's Institute
Kathy Meier McCarthy
Pacific Clinics
Michael Olenick
Child Care Resource Center
Karla Torres
AltaMed





Appendix D:

External Interview Summaries

Interviewee:

CEO, Penny Lane Centers

The retention and recruitment committees at Penny Lane Centers bring together diverse members from across the organization. They track recruitment times and employee tenure as well as methods to attract and retain top talent. Employees have shown to be the most effective recruiters for the organization. Hiring managers are well-versed in the culture and can refer to a four-page document that clearly outlines the organization's values and culture.

While unable to compete with pay rates offered by school districts, DMH, and Kaiser, Penny Lane Centers remains a competitive employer due to its unique culture of belonging, transparency around budgets and pay scales, and eliciting feedback through proactive listening activities such as employee townhalls. Penny Lane Centers implemented "coaching from the heart," a training program that equips managers with skills and tools to fill a coaching roll with their direct reports.

The organization also developed a mentoring program 18 months ago, pairing new staff with mentors from different departments. Hiring pre-licensed versus licensed staff varies by program; the average tenure for licensed staff is two years, while post-master interns typically stay longer. Interns embrace the culture and are enthusiastic about being part of Penny Lane Centers.

The organization responded to changes in the public funding model by expanding into affordable housing and mental health services as new and sustainable revenue streams for the future. This involved significant IT and data infrastructure investments and the hiring of an IT consultant to help assess and define those needs. KPIs are linked to contracts and the Joint Commission accreditation, but also staff have input on how success is defined in each program. Penny Lane Centers actively seeks funding from private foundations but does not depend on individual donors.

Additionally, every five years, the organization hosts a special anniversary event, primarily for celebration rather than fundraising purposes.

“We have developed a clear professional path by preparing those who are in a lower-level job for an internal transfer – it is clear that there is a partnership, and we will help them get to where they want to be. We also offer salary enhancement when staff transfers within the organization.”

Appendix D:

External Interview Summaries

Interviewee:
President & CEO, Wellnest

As Wellnest expanded, it became increasingly important to understand program efficiency through the lens of contract regulations and compliance. Conducting financial analysis of contracts allowed the organization to offload programs that were operating at a deficit or with high administrative costs.

Recognizing funding opportunities with fewer auditing demands, staff were reorganized to support auditing needs, making data more accurate. When Wellnest considers new programs factors that were evaluated include contract duration, service alignment with the mission, and practicality of implementation. A matrix helped prioritize new contracts based on mission alignment and comprehensive spreadsheets tracked performance metrics. Challenges from public funding and policy shifts necessitated the addition of business strategists.

To attract top talent, Wellnest offers competitive compensation and transparently shares total compensation packages with employees. Data is used to benchmark salaries for transparency and fairness. Regular staff surveys are conducted by external evaluators to maintain an understanding of employee satisfaction and areas for improvement. Recently updated pay bands, aligned with industry standards, reflect ongoing contract transitions like CalAIM.

Commitment to diversity, equity, and inclusion is integral to the strategic plan, with initiatives such as focus groups and surveys. As Wellnest approaches its 100th anniversary, fundraising efforts are being systematically built by consultant partners. Engaging prospective donors has transitioned to involve consistent communication, enhanced social media presence, and active participation in boards and community events.

“
We integrate the strategic plan into everything we do. It keeps us focused and gave us a road map through change. We had a turnover problem, so we worked on salaries and benefits. We visit it every year and enhance it to make sure that they know the organization cares about our employees and their families.
”



Appendix D:

External Interview Summaries

Interviewee:

Senior Vice President for Prenatal to Five, Children's Institute, Inc.

Children's Institute's strategic plan emphasizes engagement and coordination between programs and focusing on improving the referral process to retain clients within the agency. Efforts include refining disclosure requirements, creating a centralized community resource hub on the website for staff and partner agencies, and ensuring clients bypass internal waitlists. While some programs like EHS are fairly self-sustaining, Head Start relies on philanthropy. The fiscal team performs an annual financial review to ensure that programs are not incurring outsized cost. Anticipating changes, such as implementing coaching early, has positioned them well, with a proactive leadership team driving growth and fiscal strategies.

To ensure staff reflect the communities they serve, Children's Institute forms partnerships with local community colleges. They also maintain a large internal substitute pool, providing experience that can lead to permanent positions. Recruitment efforts take place during community events that recruit both staff and clients. In challenging communities, having staff from those areas proves beneficial. Their focus on building a diverse and representative workforce supports their mission and enhances their service delivery.

“ Indirect cost rates are not included in many of our grants, so we did a review of our funding to make sure that we were not losing money on our contracts. ”

Interviewee:

CEO & President, Pacific Clinics

Pacific Clinics has experienced significant expansion through strategic acquisitions of stable and large organizations. The process ensured continuity of services and staff retention. A strategic plan from 2016-2021 anticipated the transition to CalAIM, which created successful program growth. The integration emphasized serving individuals, families, and communities holistically. Mission alignment and clinical philosophy were critical during the merger, involving extensive due diligence, strategic leadership development, and cultural integration. Despite challenges, like system integration, Pacific Clinics learned the importance of allocating resources for critical program transitions and maintaining transparent communication.

Pacific Clinics faced external challenges related to public funding and policy as well as the struggles of an aging workforce. Strategic planning post-merger focused on expanding services, including adult services in Northern California and school-based mental health programs. Self-supporting programs like ECM/ECS and surplus-generating school-based services helped fund underfunded areas like foster care. Recruitment challenges stemmed from state realignment of funds. Pacific Clinics responded by creating programs for leadership development and implementing competitive benefits. Communicating organizational benefits involved inter-agency transparency, social media engagement, and employee recognition programs.

“ The key to our successful acquisitions has been understanding both mission alignment and due diligence on the financial side of combining organizations. We focus a lot of time on making sure that the leaders of both organizations are united in our vision for moving forward. ”



Appendix D:

External Interview Summaries

Interviewee:

CEO & President, Child Care Resource Center

As CCRC expanded, the organization focused on diversifying its revenue streams, including entering the mental health sector. This diversification necessitated an updated mission statement that was expanded to include additional services. Leadership’s involvement in national and state organizations allowed CCRC to anticipate trends and build relationships for growth opportunities. CCRC also created Chief Strategy Officer role to streamline communications and government relations.

One example of how they evaluated new programs or geographic expansion is when CCRC scaled Early Head Start programs. The goal was to use EHS to increase the agency’s bottom line and ensure comprehensive service offerings to families. The expansion involved increasing EHS enrollment from 400 to 3000 students and integrating mental health services. Outsourcing strategies were employed for IT services, while certain functions like payroll and help desk support were managed in-house to control costs.

“
As we have expanded, we have made sure to frame the diversification strategy around mission. In this process, we made sure that staff and leadership were fully bought into where we were headed.
”

Interviewee:

Manager - Community Affairs, AltaMed

Partnership decisions at AltaMed are based on company goals that are aligned with the social determinants of health. The organization has also developed the SBAR framework (Situation, Background, Assessment, Recommendation), which provides an overview of the organization and proposed programs, assessing opportunities to ensure they positively impact AltaMed and align with priority areas. Once the SBAR is sent to directors and managers, they involve other team members to work out the details in an MOU.

Partnership teams track KPIs tied to grants at federal, state, and local levels, such as enrollments. Events and initial HR screenings are outsourced. AltaMed emphasizes the value of employees in its organizational culture. Its hiring process averages two-months and new hires undergo a two-day orientation. AltaMed’s comprehensive employee development programs include leadership training, financial aid for continuous learning, mentorship programs, and quarterly leadership meetings. The AltaMed Institute provides professional development, mainly for clinical staff, and offers financial aid for advanced degrees, fostering opportunities for internal growth and career advancement.

“
We have a strong framework that guides our partnership and program decisions. This ensures strong alignment and protects against mission drift as we grow.
”



Follow our 5-year journey.



Foothill Family • foothillfamily.org • (626) 993-3000

Covina Family Center
530 W. Badillo Street, Covina, CA 91722

Donald & Priscilla Hunt Family Center
1801 Huntington Drive, Duarte, CA 91010

Dulay, Pajarillo & Moore Family Center
960 W. Mission Blvd., Pomona, CA 91766

Helen Morran-Wolf Family Center
11429 Valley Boulevard, El Monte, CA 91731

Ralph H. Moore Jr. Family Center
897 Granite Drive, Pasadena, CA 91101

Santa Anita Family Center
3629 Santa Anita Avenue, Suite 201, El Monte, CA 91731

Administrative Office
2500 E. Foothill Blvd., Suite 300, Pasadena, CA 91107