



## Imagine LA

### Strategic Plan 2022 – 2024

**Driving Impact ▪ Building Equity ▪ Together**

**Approved by the Board of Directors on February 15, 2022**

*Imagine LA is dedicated to ending the cycle of family poverty and homelessness. Together with families, we transform lives by building relationships, wellbeing, and economic mobility.*

Developed in partnership with:

The Center for Nonprofit Management



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# I. Executive Summary

## Vision

*To end the cycle of family poverty and homelessness.*

## Mission

*Together with families, we transform lives by building relationships, wellbeing, and economic mobility.*

## Overview of Strategic Planning Process

In July 2021, Imagine LA formed a diverse and inclusive Strategic Planning Task Force comprised of seven staff and six board members to undergo a six-month strategic planning process. The Strategic Planning Task Force entered the process with an eye towards increasing impact, cultivating growth, and leading meaningful systems change work.

The Task Force participated in a comprehensive, thoughtful, and transformative strategic planning process facilitated by the Center for Nonprofit Management (“CNM”). Dedicated volunteers also provided the Task Force with instrumental support. The strategic planning process included: recognition of decades of success; honest reflection and discussion around organizational pain points, strengthening and reorientation in recent years; and the opportunities for continued growth and success.

CNM employed a variety of methods to collect the perspectives of more than 80 individuals across a range of Imagine LA stakeholders from the following groups:

- Board members
- Community & strategic partners
- Current staff
- Faith-based community partners
- Foundations
- Government funders
- Government leaders and agencies
- Imagine LA Families
- Imagine LA Mentors

Key contributors were conceptualized into five personas based on their intimacy with Imagine LA families:

- Current & Alumni Imagine LA Families
- “Direct Touch” – Staff and Mentors
- “Close Supporters” – Board and Financial Contributors (i.e., Donors, Foundations)
- “Community Supporters” – Faith-Based and NPOs in the Field
- “External Experts” – Government, Subject Matter Experts

As a result of the strategic planning process, the Task Force identified five north stars, four strategic priorities, and three essential building blocks.

North Stars – guiding values that are integrated and woven into each of the initiatives flowing from this strategic plan

1. Delivery
2. Enhancement
3. Expansion
4. Innovation

## 5. Funding

Strategic Priorities – areas of investment for the next three years

1. Growth, Enhancement, Innovation, and Expansion
2. Organizational Culture and Infrastructure
3. Sector Leadership
4. Succession and Transition Planning

Essential Building Blocks – foundational elements that strengthen organizational operation

1. Financial Durability, Sustainability, and Efficacy
2. Communications and Marketing
3. Internal Processes, Systems, and Human Capacity

### Imagine LA Tomorrow

Imagine LA's new path, as outlined in this **2022 – 2024 Strategic Plan: Driving Impact • Building Equity • Together**, will enable the organization to pursue new initiatives, roles, and opportunities while strengthening organizational health, refining its models and approach to serving families, continuing to guide families in achieving financial independence and preventing repeat homelessness.

The pillars of Imagine LA's new trajectory are (1) Growth, Enhancement, Innovation, and Expansion, (2) Organizational Culture and Infrastructure, (3) Sector Leadership, and (4) Succession and Transition Planning, built on the cornerstones of (A) Financial Durability, Sustainability, and Efficacy, (B) Communications and Marketing, and (C) Internal Processes, Systems, and Human Capacity. Successful execution of these primary pillars will increase Imagine LA's impact on families, strengthen organizational health, and benefit the sector of family homelessness and poverty.

The Imagine LA of tomorrow will continue to be recognized and acknowledged as a key service provider, advocate, and innovator within the sector. Through its infallible commitment to families, it will continue to play a transformative role in preventing family homelessness and poverty in Los Angeles. Through continued evaluation and advocacy and the dissemination of Imagine LA-designed tools and models, its impact may reach nation-wide.

## II. Introduction & Acknowledgements

*Dear Imagine LA Family,*

When the **2022 – 2024 Strategic Planning Task Force** was formed in early 2021, thought occurred to us:  
*In 2022, Imagine LA celebrates our Sweet Sixteen.*

It is a pivotal year for any individual – one where we learn to drive, begin to cement our values and ideals, and form the foundation for a life of societal productivity and loving relationships. Famed psychologist Erik Erikson tells us that this stage is the most crucial because our actions and the identity we establish now will guide us the rest of our lives.

We took this metaphor to heart in the creation of the Strategic Plan that follows. To create it, we built a diverse and inclusive **Task Force** of seven staff and six board members and partnered with the **Center for Nonprofit Management (CNM)** to facilitate the process, based on their deep knowledge of our sector and commitment to Equity, Diversity, and Inclusion.

With the invaluable help of dedicated volunteers and CNM, we interviewed more than **five dozen stakeholders**, including: current and alumni families, mentors, staff and board members, donors, volunteers, community partners, sector leaders, and more. Through dialogue and synthesis, we gained an understanding of their experiences, insights, and vision for Imagine LA. All of this took place virtually as we navigated the second year of the COVID-19 pandemic and weighed its ramifications for our future.

Now, we are proud to share Imagine LA’s most comprehensive and forward-looking Strategic Plan to date. Over the next three years, in pursuit of ending the cycle of family homelessness and poverty, we will drive to increase our impact on each family we work with and to significantly expand the universe of families served and impacted. We will invest deeply in our **Family Partnership Model**, in our **team’s health and infrastructure**, and in scaling our **Economic Mobility** work to both prevent homelessness and promote financial independence, to create lasting generational exits from poverty. We will take to new heights as a **leader in the sector** and expand our most impactful work through **new partnerships, business models, social benefit systems policy change work**, and **social benefit navigation tools**. Anchoring this work, we will continue executing and evolving our **fundraising and financial** practices, **marketing and communications** tactics, and **internal processes and systems**.

Thank you again to the Center for Nonprofit Management, our dedicated volunteers, and our committed Task Force Members for keeping us firmly rooted in the dignity of our families, our values of Equity, Diversity, and Inclusion, and the knowledge that together we can end the cycle of poverty and homelessness for every family in Los Angeles and beyond.

**Buckle up, friends.**

Onward Together,

Joe Takai  
SP22 Co-Chair  
Board Co-Chair

Brian Rosenbaum, MSSW, CVA  
SP22 Co-Chair  
Community Engagement Director

### III. Overview: The Context of our Strategic Planning

Over the past nearly 15 years, Imagine LA has learned much about the generational impacts of poverty and what families need to make meaningful progress towards their goals. Imagine LA's **Family Partnership Model** has evolved to be one that transforms lives through a holistic combination of clinical case management, robust economic mobility programming, and whole-family mentorship.

The organization has moved from exclusively supporting families in scattered site housing to a blended model that includes single-site PSH and affordable housing communities. Imagine LA has worked with families who are exiting homelessness and in a preventive model with families on the precipice of homelessness. It has deeply analyzed the systemic issues around family poverty, especially single-parent households, and developed an **Economic Mobility Pathways Program** that equips families to escape poverty through living-wage careers, childcare access, and strengthened financial capabilities (recognized with a 2021 Bank of America Neighborhood Builder Award).

With the USC Price Center for Social Innovation, Imagine LA uncovered systemic flaws in the social benefit system. Imagine LA wholly believes that increased social benefit transparency – paired with meaningful policy change and Economic Mobility Pathways – can create financial independence for families and end the generation cycle of poverty and homelessness.

**2021 was the final year of Imagine LA's 2019 – 2021 Strategic Plan.** The execution of the 2019 – 2021 plan, along with the pandemic and a deep dive into Equity Diversity and Inclusion, led to significant innovation, learning, and growth. Specifically, during 2019 – 2021, Imagine LA executed the following initiatives:

- **Financial Wellness Initiative** that explored the four drivers of family economic mobility for single adult-headed families, which resulted in our new **Economic Mobility Pathways Program**, which we have since integrated into the Family Partnership Model and is designed for scaling.
- **Social Benefit System research** with the USC Price Center for Social Innovation, which revealed the need for system transparency and policy change to better support families. Imagine LA responded by deciding to create a Social Benefit Calculator and a coalition to promote policy change.
- **“Unbundled” Mentorship from our Family Partnership Model (FPM) and made it optional**, allowing families to participate in FPM during the pandemic without doing mentorship. This significantly hindered the effectiveness of FPM. As we emerge from the pandemic, Mentorship will reemerge as a critical component of our Family Partnership Model.
- **Explored two homelessness prevention pilots** and executed one. We determined that leading with financial relief is *not* an effective strategy and pivoted to Economic Mobility to drive prevention.
- **Created Family Inspiration Housing to pilot master leasing low-income luxury housing for our families.** Even though this is a self-sustaining and -funded program, we determined that the inherent conflict of being a family's landlord and advocate was not worth it.
- Our **first licensed affiliate pilot** with The Whole Child (“Imagine Whittier”) was deemed successful and The Whole Child will become a full-fledged licensed affiliate, bringing our Family Partnership Model to their whole organization (over 600 families).
- **Began housing families through the Emergency Housing Voucher program.** Given our strong relationships with landlords, we hope to be able to find housing for families quickly, while simultaneously providing our Family Partner Model, leading to faster stability and thriving.

- **Optimized and enhanced Community Engagement and Development processes and strategies**, specifically related to: mentor recruitment, screening, and matching; strategic partnership building; creation of an Ambassadors Program; a full organizational rebrand; core communications activities; family fun events; development operations; donor cultivation and stewardship; and grant writing.
- **Leaned into Equity, Diversity, and Inclusion** through a full organizational assessment, Task Force formation, hiring an outside consultant, development of a strategic plan and EDI Statement, and hundreds of hours of staff and board training, roundtable discussions, and courageous conversations to build a stronger, more resilient, more equitable organization.
- **Enhanced our finance and infrastructure systems**, including a major overhaul of our accounting process and reporting practices (thanks to a new vendor, Noble Accounting), moving all electronic files to the cloud (Microsoft SharePoint), and embracing Microsoft Teams for virtual collaboration.

Seeking to maximize all the learning from these initiatives and determine the optimal trajectory, in July 2021, Imagine LA formed a diverse and inclusive Strategic Planning Task Force comprised of seven staff and six board members. The Strategic Planning Task Force entered the process with an eye towards increasing impact, cultivating growth, and leading meaningful systems change work.

## IV. Imagine LA Today

This three-year Strategic Plan, **Driving Impact • Building Equity • Together**, was created through meetings and retreats with the full board and Task Force working sessions as well as extensive stakeholder research.

As the numbers of people experiencing homelessness reach historic highs, Los Angeles faces a critical moment in its history. This challenge requires collaborative, holistic solutions to end family poverty and homelessness in our community. While housing families is a critical first step, housing must be paired with equitable access to resources – including social capital – to ensure families have opportunities to build stability and avoid repeat homelessness. Imagine LA has created an effective model for partnering with families to break the cycle of generational poverty and build pathways to stability and wellbeing.

Imagine LA was conceptualized in 2025 by Rev. Dr. Mark Brewer, then Senior Pastor of Bel Air Presbyterian Church. If each of Los Angeles' 8,000 faith communities were to partner with just one of the then 8,000 families experiencing homelessness in our community, he thought, they could create deep personal connections and leverage the faith community's social networks to have a profound impact on that one family and have rippling effects on family homelessness and intergenerational poverty across the County.

Jill Bauman, first as a Board member and then as Interim Executive Director, led research on family homelessness, revealing that while there were plenty of temporary shelter and basic needs services available to families, there was little to no support for them once they were placed into housing.

In 2008, Imagine LA began working with three families, providing whole-family case management and launching its mentorship program. This program has grown to be the most holistic and impactful two-generational program in LA County. In 2020, Imagine LA served 165 families. In 2021, 208 families. In 2020, the majority (86%) of the families served are led by unpartnered women, and 86% identify as Black, Indigenous, and People of Color. Historically, we have served families who have recently experienced homelessness and are now housed in scattered apartment sites in South Los Angeles, Mid-City, and the San Fernando Valley.

In late 2021, Imagine LA began expanding its work into West LA with the opening of Missouri Place, a 73-unit supportive and affordable housing community, where Imagine LA will be the exclusive onsite service provider. Missouri Place is the first of six properties to be developed by Thomas Safran & Associates where Imagine LA will provide onsite services. Also, in 2021 Imagine LA began working with families experiencing homelessness that have been selected to receive Emergency Housing Vouchers to help them find housing as well participate in our Family Partnership Model.

With an eye towards increasing impact, growth, and meaningful systems change, in 2022 Imagine LA will directly serve approximately 280 families via expansion of its Economic Mobility Program to four other LA-based social service agencies (100 families) and its licensed affiliate “Imagine Whittier” (The Whole Child). In addition, Imagine LA will touch countless other individuals, families, and systems through the rollout of the Social Benefit Calculator and social benefit policy change work.

It is within this context, Imagine LA entered the strategic planning process: poised to focus and identify goals and strategies to maximize growth and impact now through 2024.

## **V. Our Planning Process: Methodologies and Engagement**

In 2021, Imagine LA initiated the strategic planning process with the goal of revisiting and leveraging its history, successes and lessons learned – including its innovative tools and models – to determine a strategic direction that reinforced organizational health and sustainability and empowered the organization to pursue and achieve success in new initiatives and opportunities.

Members of the staff and Board of Directors formed the Imagine LA Strategic Planning 2022 Task Force. The Task Force participated in a comprehensive, thoughtful, and transformative strategic planning process facilitated by the Center for Nonprofit Management (“CNM”). Dedicated volunteers from McKinsey & Company also provided instrumental support. The strategic planning process included recognition of decades of success, honest reflection, and discussion around organizational pain points, strengthening and reorientation in recent years, and the opportunities for continued growth and success.

CNM employed a variety of methods to collect the perspectives of more than 80 individuals across a range of sectors and stakeholder profiles, including:

- Strategic Planning Task Force convenings to co-plan and oversee the process
- Individual and group interviews with internal and external stakeholders
- Individual and group interviews with staff and board members
- Online survey of donors and funders
- Review of prior Strategic Plans and strategic snapshots
- Development of an environmental scan and SWOT analysis
- Facilitated planning retreat with board and staff
- Development of a framework of priorities and organizational goals and strategies
- Preparation of a Strategic Plan and framework for an implementation plan
- Board review, approval, and adoption of the full strategic plan

The key contributors were conceptualized into five personas based on their intimacy with Imagine LA families:

1. Imagine LA Families (n=12)
2. “Direct Touch”
  - a. Staff (n=14)
  - b. Mentors (n=6)
3. “Close Supporters”
  - a. Board, current and former (n=16)
  - b. Financial contributors (i.e., donors, foundations) (n=3)
4. “Community Supporters”
  - a. Faith-based organizations (n=5)
  - b. Other social service agencies (n=17)
5. “External Experts”
  - a. Government (n=5)
  - b. Subject matter experts (n=2)



Through a synthesis of the data, each persona was developed with core beliefs, priorities, and insights. For an overview of each persona’s beliefs, priorities, and insights, please see Appendix 1.

Key findings from the stakeholder input indicated significant consensus about Imagine LA:

- We have designed and deliver an effective model that demonstrates impact on families
- Our Leadership Team possesses a powerful ability to cultivate and maintain personal relationships and partnerships with a wide range of stakeholders, leaders, and partners
- This asset further strengthens partners’ trust and investment in Imagine LA
- Imagine LA visibly adapts and innovates to serve families, especially at times of great need

Stakeholders expressed the following key opportunities for Imagine LA:

- To improve on communicating its impact to various audiences, ranging from internal communications to external partners
- Deeper presence in the digital space
- Formalized support structures to alleviate the stresses and burdens currently felt by staff and prime the organization for continued growth
- Increased focus on the mental health needs of Imagine LA families, potentially leveraging mental health sector partnerships
- Stronger position as a leader and advocate within the sector of family homelessness and poverty

These key findings are further contextualized within the global pandemic that began in March 2020. In 2020 – 2021, Imagine LA felt ongoing pressure to adapt to broken systems that create, maintain, and exacerbate poverty and inequality and to adapt to the evolving, fluctuating, and unpredictable nature of the pandemic.

Yet, amidst these challenges, Imagine LA has managed to grow and expand its work and impact throughout Los Angeles. The organization has grown its financial reserves and diversified its funding portfolio, resulting in stability and opportunity for expansion during uncertain times. Current Leadership is demonstrating a clear capacity and desire to execute complex new projects and initiatives at sector-wide, systemic, and local levels. Both the board and staff have deepened their commitment to families. Simultaneously, Imagine LA families remain committed to the organization’s mission by continuing to speak on behalf of Imagine LA and advocate for more families to enroll in the program.

During the planning retreat, the board and staff conducted a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis which included a review of the stakeholder input and relevant historical considerations and facilitated discussions to articulate emerging strategic priorities.

## VI. Our Path Forward: Strategic Priorities and Essential Building Blocks

*Together with families, we transform lives by building relationships, wellbeing, and economic mobility.*

Imagine LA is poised to embark on new initiatives and seize opportunities for growing and expanding its work and impact now through 2024. Imagine LA entered 2022 with:

- A strong leadership team and staff in place, having successfully navigated the ongoing COVID-19 pandemic and the need to grow its program staff by 33% in 2020 – 2021
- A solid financial position, having a diverse funding mix, longer-term funding sources, and larger reserves
- Deep Equity, Diversity and Inclusion learning, values, and accountability measures
- Clear growth, enhancement, innovation, and expansion opportunities to increase impact via:
  - Direct service to families (Family Partnership Model) via scattered site housing and new onsite programming at Missouri Place
  - Enhancement of mentorship and youth programming
  - Expansion of Economic Mobility Programming via new partnerships
  - Creation of the Social Benefit Calculator and social benefit policy change
  - Thought leadership in the family homelessness and poverty sector
- A new three-year Strategic Plan: **Driving Impact • Building Equity • Together**

This Strategic Plan operates to guide Imagine LA in fulfilling its mission through four strategic priorities and three critical underlying foundational elements.

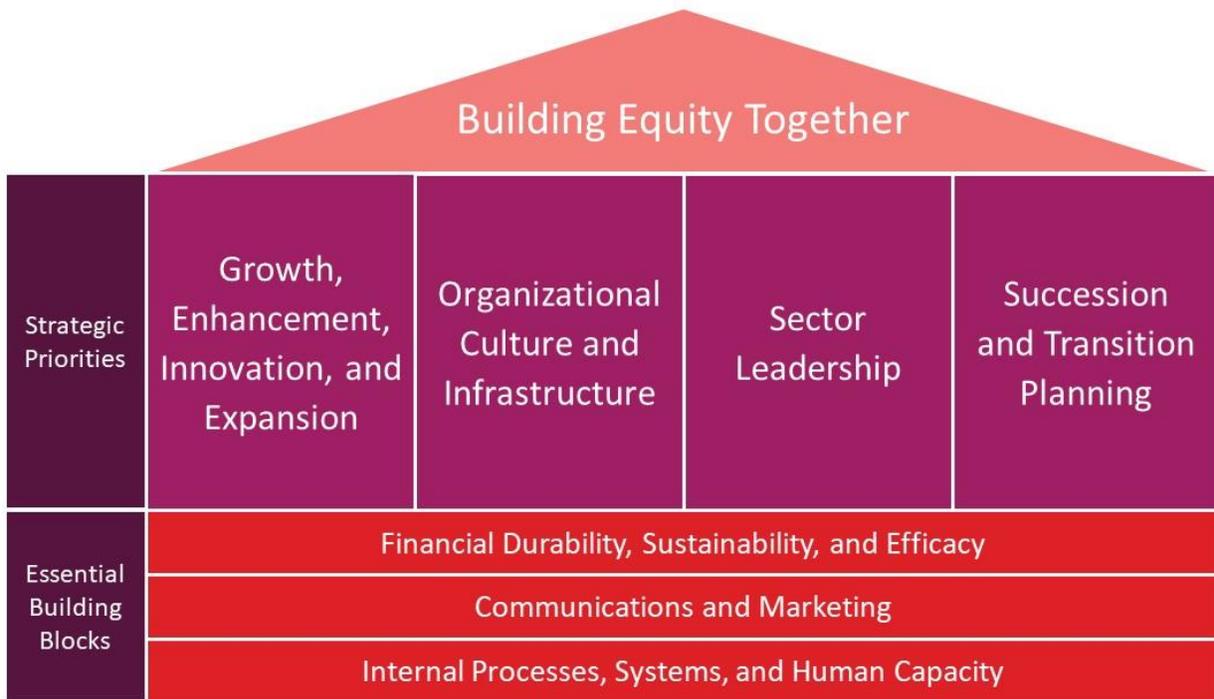
**Strategic Priorities**

1. Growth, Enhancement, Innovation, and Expansion
2. Organizational Culture and Infrastructure
3. Sector Leadership
4. Succession and Transition Planning

**Essential Building Blocks**

- A. Financial Durability, Sustainability, and Efficacy
- B. Communications and Marketing
- C. Internal Processes, Systems, and Human Capacity

Through the strategic planning process, the Task Force determined these strategic priorities and essential building blocks for their roles in strengthening and expanding Imagine LA’s ability to **Drive Impact and Build Equity Together**, toward ending the cycle of family poverty and homelessness.



**North Stars**

The Task Force also identified the following North Stars that further guide and inform the work and decisions that will flow from this Strategic Plan.

- **Delivery:** The provision of Imagine LA’s services, including the organization’s programmatic models, innovative tools, and approaches to ending poverty and preventing first-time and repeat homelessness among Imagine LA families.

- **Enhancement to maximize impact:** The identification, through analysis, of what Imagine LA needs to do in order to provide services, innovate, advocate, lead, and empower more efficiently; to function in alignment with our core values; and to measure and achieve better outcomes.
- **Expansion:** The identification, through analysis, of what Imagine LA should be doing more of including, but not limited to, service provision and injecting innovative tools and models into the sector.
- **Innovation:** The commitment to envisioning what Imagine LA could be doing to strengthen, inform, support, and lead the family homelessness and poverty sector.
- **Funding:** The implementation of a thoughtful fund development plan that safeguards the financial durability of the organization, intentionally pursues methods of increasing financial sustainability through growing a diverse portfolio and revenue streams, and ensures that funds are strategically invested to furthering the organization’s mission to transform the lives of families and prevent family homelessness and poverty.

## Strategic Priorities

Through the strategic planning process, Imagine LA’s Strategic Planning Task Force identified four strategic priorities:

1. Growth, Enhancement, Innovation, and Expansion
2. Organizational Culture and Infrastructure
3. Sector Leadership
4. Succession and Transition Planning

The following pages detail each of the four priorities by fiscal year (2022 – 2024). While the dots (pictured below) are intended to guide planning and implementation, we will reassess the timing and build additional activities based on available resources, organizational priorities, and emerging trends and opportunities.

- Concentrated Effort
- Ongoing Effort

### Priority 1: Growth, Enhancement, Innovation, and Expansion

Imagine LA will pursue growth, enhancement, innovation, and expansion via:

- 1) Growth of direct service to the families we serve with our full Family Partnership Model via scattered sites (fueled by ICMS contract with DHS and EHV) and our new partnership with Thomas Safran & Associates to provide onsite service at six housing developments (roughly 500 housing units over the next 3 years)
- 2) Enhancement of our mentorship and youth programming
- 3) Expansion of our Economic Mobility Programming with partner agencies
- 4) Robust evaluation of our programs to build the evidence base and document best practices
- 5) Expansion of Licensed Affiliates (first expand relationship with The Whole Child, and then explore opportunities to add new affiliates)

- 6) Innovation and creation of the Social Benefit Calculator to (1) equip case managers and low-income families throughout LA and statewide to navigate the complex morass of social service benefits, and (2) inform policy change.

**Three-Year Trajectory**

Success in three-years requires Imagine LA to design and begin to implement an evaluation plan for all of its programs to build evidence-based and best practices. Evaluation plans should also encapsulate metrics that support Imagine LA in demonstrating its enhancement of mentorship and youth programs, expansion of the Economic Mobility Programing, and growth in direct services to families via scattered sites and housing developments. In addition, Imagine LA will develop a plan in anticipation of rolling out the Social Benefit Calculator, to evaluate and measure its ability to equip case managers and low-income families in navigating and accessing social service benefits; and leverage those findings to inform policy change.

Simultaneously, current and new partnerships will be cultivated in order to foster Economic Mobility Programming, expand its network of licensed affiliates, and promote the Social Benefit Calculator.

**Strategies for Success**

Implementation of our Growth, Enhancement, Innovation & Expansion strategy will be led by Andrea LeBeouf, Program Director. Andrea will work with staff and volunteers to implement growth and enhancement activities, including the expansion of the external Economic Mobility Pathways program.

Priority 1: Growth, Enhancement, Innovation, and Expansion	2022	2023	2024
<b>Strategy 1.1:</b> Assess and strengthen Program capacity by: <ol style="list-style-type: none"> <li>1. Clarifying and creating Impact Dashboard</li> <li>2. Delivering scattered site and onsite PSH Services</li> <li>3. Externally expanding the Economic Mobility Program from pilot to launch</li> <li>4. Investing in and developing Economic Mobility via Social Benefits               <ol style="list-style-type: none"> <li>a. Create Social Benefit Calculator for case management and policy change advocacy work</li> <li>b. From test, pilot, to launch</li> </ol> </li> </ol>	●	●	●
<b>Strategy 1.2:</b> Refine adult mentorship model and enhance youth programming to be fully integrated into existing and future partnerships.	●	●	●
<b>Strategy 1.3:</b> Develop a thorough evaluation process of the Economic Mobility program model internally and externally, including determining a sustainable funding model (e.g., fee-for-service).		●	
<b>Strategy 1.4:</b> Form and launch Family Impact Council	●	●	
<b>Strategy 1.5:</b> Become an evidence-based practice by developing measures to study, evaluate, assess our work, as well as document and disseminate what we have learned.	●	●	●
<b>Strategy 1.6:</b> Develop and rollout Social Benefits Calculator app to equip case managers and low-income families throughout LA and statewide and inform		●	●

policy change; design an evaluation plan to measure its ability to equip case managers and low-income families in accessing social service benefits; and explore its revenue stream potential.			
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## Priority 2: Organizational Culture and Infrastructure

Organizational culture encapsulates the internal processes and intentional design of the organization that ensure overall health of Imagine LA’s internal team. Our direction is guided by our tagline – *Building Equity Together* – and is informed by our deep Equity, Diversity, and Inclusion work.

The wellbeing and professional development of the internal team is critical to effectively serving families who depend on well-trained, trauma-informed staff and volunteers who are passionate about preserving the dignity of families. As we have grown, we have added a new managerial level, and most of these staff are first-time managers. We are equipping them with strong management training and tools. Further, the empowerment of Imagine LA families is linked to the interpersonal relationships they develop with our staff. Key to building a strong and effective team is the attention paid to how the work is supported in terms of capacity, workload, and providing the processes to regularly review, assess, and adjust as new opportunities are presented. Technology and software support also plays a role in how effective staff can perform and engage with Imagine LA families.

**Overarching Goal:** To support the growth and health of staff as key components to providing consistent, supportive, and empowering services to Imagine LA families.

### Three-Year Trajectory

In three years, Imagine LA will have strengthened organizational health by having (1) established systems that support change, growth, and the maintenance of an engaged, healthy, EDI-centered workplace, (2) built a clear pathway for staff from recruitment, to hired and trained, and ultimately cultivated for leadership roles, and (3) invested in necessary technologies to equip staff to effectively manage, build, and strengthen Imagine LA programs and models.

### Strategies for Success

Karrin Cologne, People & Operations Director, will be responsible for the oversight and administration of our Organizational Culture work. To assist, we will be hiring a People & Operations Manager. Additionally, Brian Rosenbaum, Community Engagement Director, thanks to funding from The Ahmanson Foundation, will lead the consolidation of our customer relationship management (CRM) systems to more effectively track program data, volunteerism, mentors, fundraising, communications, and more.

Priority 2: Organizational Culture and Infrastructure	2022	2023	2024
<b>Strategy 2.1:</b> Determine the infrastructure, human capacity, and technologies needed to fulfill current and potential programs and contracts; and strengthen when necessary.	●	●	●
<b>Strategy 2.2:</b> Increase employees’ reporting of being engaged, feeling safe, productive, happy, and healthy in the workplace.	●	●	●

<b>Strategy 2.3:</b> Uphold core organizational values with clear guidelines allowing for feedback around guidelines, training, and opportunities.	●	●	●
<b>Strategy 2.4:</b> Ensure a consistent pool of applicants to meet needs arising from organizational growth and staff turnover.		●	●
<b>Strategy 2.5:</b> Grow in our commitment to EDI, recognizing that EDI is an ongoing, cyclical process requiring measures that push the work forward and support continued growth; revise Bylaws to reflect EDI work.	●	●	●

### Priority 3: Sector Leadership

Imagine LA has spent nearly 15 years working and innovating to end family homelessness and poverty. The organization has learned much in the process, from both the direct service and systems change perspective, and has much to share with the community. Now is the time to elevate Imagine LA’s voice to share about its impactful, innovative programs, and lessons learned, and advocate for systems change.

As a thought leader in the field, Imagine LA can establish itself as a sector leader and help shape policy and culture around ending family homelessness and poverty. Via the Social Benefit research work, in 2021 we began building a national coalition aimed at elevating the conversation in Los Angeles, throughout California, and nationally. The coalition will advocate for changes to social benefit policies that promote Economic Mobility and prevent homelessness.

**Overarching Goal:** To elevate Imagine LA as a visible champion for and key-thought leader around ending generational family poverty and homelessness.

#### Three-Year Trajectory

The Task Force identified a desire to cement Imagine LA as a leader within the nonprofit and social service field, with a focus on preventing and ending family homelessness and poverty. The geographical bounds of this sector extend nationwide. The Task Force also recognized Imagine LA’s success shedding light on the current benefits system (e.g., how it operates, the unfilled gaps, how and why it does not work) and using its voice to advance equity sector-wide (e.g., through coalition membership, participation in public policy advocacy campaigns, and convening leaders in the field). Sector leadership, consequently, incorporates a system-levels focus as well.

Success in three years, therefore, requires Imagine LA to have identified and made inroads toward a unique and impactful role within the sector that positions the organization as an advocate, influencer, and expert in and around family homelessness and poverty. Its relationships with the Family Caucus, the media, and other sector leaders complement this role and further enable Imagine LA to raise awareness, engage with systems, and uplift Imagine LA’s innovative tools, models, and approaches to addressing systemic gaps.

#### Strategies for Success

Our work on Sector Leadership will be primarily led by Jill Bauman. As trusted community leader and sought-after thought leader on the issues of family homelessness and poverty, Jill is well-positioned to engage and convene partners in ways that position Imagine LA as a key sector leader.

Priority 3: Sector Leadership	2022	2023	2024
<b>Strategy 3.1:</b> Identify areas of influence within the sector and what needs to be achieved in order to ensure that economic mobility is part of the conversation around family poverty and homelessness.	●	●	●
<b>Strategy 3.2:</b> Determine Imagine LA’s optimal role in the sector – including an advocacy role – and pathways to realizing that role.	●		
<b>Strategy 3.3:</b> Determine the optimal role of the Family Caucus in the sector and strategies to mobilize the Caucus.	●		
<b>Strategy 3.4:</b> Seize opportunities to share our impactful, innovative programs as well as lessons learned and advocate for systems change.	●	●	●
<b>Strategy 3.5:</b> Mobilize coalitions and sector partners to raise awareness, advocate, influence, and shape policy and culture around ending family homelessness and poverty.	●	●	●
<b>Strategy 3.6:</b> Develop Imagine LA’s relationships, image, and work so the organization can directly engage with media outlets, public figures, and leaders around family poverty and homelessness.	●	●	●

#### Priority 4: Succession and Transition Planning

To support the continued development of our direct service programs, namely the Family Partnership Model, the external expansion of our Economic Mobility Program, and the development of a software application (Social Benefit Calculator), our Board and executive leadership have identified a need for succession and transition planning. Specifically, we are planning to hire an Executive Director to run the social service aspect of our organization (the Family Partnership Model), while the President & CEO will shift to lead the external expansion of the Economic Mobility Program, Sector Leadership efforts, and the development, pilot, and deployment of our Social Benefit Calculator and related policy work. Both the Economic Mobility Program and the Social Benefit Calculator could eventually transition to separate Fee-for-Service businesses. We may also find it strategically advantageous to spin these into separate divisions or organizations to accelerate the impact of this work. While we are still in the early phases of planning, we are committed to thoughtfully approaching the future sustainability of the organization. Our approach will begin in 2022 and carry forward with the guidance and oversight of our board.

The board is integral throughout this transition ensuring organizational health and maintaining strategic direction. A succession plan for the board will further strengthen the board and its ability to guide and support the organization through and following the aforementioned transitions. Our board will also focus on recruiting additional Board members that support our impactful work and support our Board leadership succession needs.

**Overarching Goal:** To design and implement a three-pronged plan to (1) facilitate a seamless transfer of institutional information and relationships to the Executive Director; (2) transition the current President & CEO into a new leadership role including fund development, sector leadership, expansion of Economic

Mobility, creation and deployment of the Social Benefit Calculator and advocating for social benefit policy change; and (3) strengthen the Board to support and foster organizational and staff transitions.

**Three-Year Trajectory**

Within three years, Imagine LA will have an established Executive Director who employs the necessary skills, qualities, and relationships to nurture the growth and organizational health of Imagine LA as well as establishes Imagine LA as an advocate and leader within the sector of family homelessness and poverty. A new and separate division of Imagine LA focused on developing and scaling the Social Benefits Calculator and Economic Mobility Programs to allow for monetization through adaptation and use by other social service organizations. The board will have supported the organization throughout the transition of leadership as well as have a board succession plan in place.

**Strategies for Success**

Our Board will be primarily responsible for the design and implementation of Imagine LA’s leadership Succession and Transition Plan, with key input from organization leaders. The Development Team, led by Brian Rosenbaum, is engaging a panoply of individuals who are eager to be part of Imagine LA’s impact, whether on committees, Task Forces, Board, via strategic partnerships, as volunteers, or other opportunities.

Priority 4: Succession and Transition Planning	2022	2023	2024
<b>Strategy 4.1:</b> Determine the qualities and expertise desired in the Executive Director including superlative skills and experience including a social service background and ability to relate to the families we serve.	●		
<b>Strategy 4.2:</b> Ensure the job description and means of conducting an ED search is grounded in the values of equity, diversity, inclusion, and justice, so a diverse set of highly qualified candidates are presented to Imagine LA.	●		
<b>Strategy 4.3:</b> Design a transition plan to train and share institutional information and relationships with the new ED.	●		
<b>Strategy 4.4:</b> Equip the new ED with tracking metrics to demonstrate an increase of quantity and quality of core social service provision and funding streams.	●		
<b>Strategy 4.5:</b> Determine and create separate organization and structure to implement desired scaled outcomes in optimal way.	●	●	●
<b>Strategy 4.6:</b> Develop a board succession plan to strengthen transition of leadership, organizational health and growth, and preserve institutional knowledge; revise Bylaws to reflect new structures and EDI work.	●		
<b>Strategy 4.7:</b> Recruit additional board members that reflect our values and mission.	●	●	●

## Essential Building Blocks

Alongside our strategic priorities, our three essential building blocks are: 1) maintain and create greater financial stability with sustainable funding, (2) build strategic and robust communications, and 3) invest in internal processes, systems, and capacity.

We must continue to **create financial durability, sustainability, and efficacy**. To do this, we will continue to diversify funding streams to fuel execution of the Strategic Plan. Beyond general operating funds, we will raise capital to fund the Social Benefits Calculator, as well as to explore the development and scaling of Imagine LA's Social Benefits Calculator and Economic Mobility Programs to allow for monetization through adaptation and use by other social service organizations. The resources for these efforts will be secured through the work of our growing Development Team, our strategic grants firm Elevate, and exploration of sustainable government funding.

We must **leverage robust and strategic communications and marketing** efforts, including designing a communication plan that reflects the vision and initiatives of this Strategic Plan while simultaneously communicating that Imagine LA's family-centric mission and commitment towards ending family homelessness and poverty remain steadfast.

Finally, we must **invest in the internal processes, systems, and human capacity** that will allow for sustainable growth over time. This includes continued investment in technologies, human resources, onboarding, professional development, a strong candidate recruitment process, employee retention, and cultivating an EDI-centric workplace.

### Essential A: Financial Durability, Sustainability, and Efficacy

Imagine LA has successfully developed a diverse portfolio of donors, foundational grants, and county contracts. As a result, the organization is positioned to strategize growth and expansion of its work and is committed to creating sustainable funding sources to fuel our impact and growth.

#### Financial Durability

Approaching the third year of a global pandemic, it is clear that an organization's ability to provide services without interruption and maintain its workforce is dependent on its financial durability. Imagine LA has proven resilient throughout the pandemic, offering case management, maintaining its mentorship program virtually and telephonically, delivering basic necessities, and housing families at a time where government and nonprofit services, resources, and housing are limited.

#### Financial Sustainability

Thanks to solid financial practices and fundraising success in 2020 and 2021, Imagine LA is financially stable and sustainable. Building upon this foundation, we have the opportunity to achieve even greater stability through several strategies: (1) design and implement a long-term funding strategy which includes further diversifying its portfolio; (2) raise needed capital for the development and launch of the Social Benefit Calculator; (3) explore sustainable revenue models, such as fee-for-service; and (4) actively pursuing grant-funding and government contracts opportunities that align with Imagine LA's mission to prevent family homelessness and poverty.

## **Financial Efficacy**

Financial efficacy is key to ensuring Imagine LA funding is effectively and appropriately spent to advance its mission, including enhancing the means by which the organization delivers services, empowers families to achieve financial independence, and shares and leverages its learning and expertise within the sector.

## **Essential B: Communication**

The Strategic Plan Task Force affirmed that the roles and initiatives that flow from this Strategic Plan will be reflected in its current and in future iterations of its communication plan. Imagine LA will need to communicate to its funders, donors, partners, families, sector leaders, media, and other community stakeholders its role within the sector; the innovative tools and models it produced, their efficacy, and what benefit they can provide the sector; the upcoming transition of leadership; and the meaningful relationship and distinction between Imagine LA and a new and separate division of Imagine LA focused on the development and scaling of the Social Benefits Calculator and Economic Mobility Programs to allow for monetization through adaptation and use by other social service organizations.

While new initiatives and changes are pursued, Imagine LA's family-centric mission and commitment towards preventing family homelessness and poverty remains the same. The consistent mission and integrity of Imagine LA will need to be communicated effectively to various audiences.

## **Essential C: Internal Processes & Systems**

In alignment with the strategic priority *Organizational Culture and Infrastructure*, internal processes and systems also require an intentional investment to strengthen Imagine LA's human capacity. Systems may include continued investment in technologies, human resources, onboarding, ongoing training and professional development, staff recruitment and retention, and cultivating an EDI-centric workplace. In addition, Imagine LA may consider formalizing strategies for cultivating leadership and participation of current and alumni families in decision-making, in addition to the Strategy 1 to launch a community advisory board.

## **VII. Vision for Success**

Imagine LA has developed a comprehensive implementation and assessment strategy for the plan, starting with achievable goals for 2022 and 2023. All efforts within the organization will be anchored within the Strategic Plan's framework, while ongoing evaluation and analysis will ensure we meet the plan's goals. While implementation is an evolving process, the goals will serve as focal points for staff and board and as guideposts for measuring progress and success.

As we grow and evolve in the coming years, Imagine LA is privileged to live out the title of this Strategic Plan: **Driving Impact • Building Equity • Together**. We commit to our families' wellbeing always being our guiding light. We acknowledge that our success as an organization depends on every decision and action being grounded in social justice. And we will continue to embrace *togetherness* in every sense of the word: walking alongside our families and mentors on their journeys, working inclusively and intentionally as staff and board, building strong collaborations and partnerships with our communities, and understanding that no single organization can end family poverty and homelessness; we must work *together*. ❤️

# VIII. Appendix

## Appendix 1: Key Contributor Personas

				
<p><b>ILA FAMILIES</b></p> <p><b>Family Members, Adult &amp; Youth Ambassadors</b></p> <p><b>BELIEFS</b></p> <ul style="list-style-type: none"> <li>• With the right support system and resources, the chances of repeat homelessness are reduced</li> <li>• ILA Staff &amp; Mentors demonstrate understanding, empathy, and do not judge</li> <li>• ILA supports people who have never felt supported or cheered on before</li> <li>• Having someone in your corner helps restore human dignity</li> </ul> <p><b>PRIORITIES</b></p> <ul style="list-style-type: none"> <li>• Connections to a support system and to resources</li> <li>• Opportunities to give back and connect with families who share lived experiences</li> <li>• Gain and sustain overall independence (economic and housing stability, confidence to achieve goals and pursue dreams, etc.)</li> </ul> <p><b>INSIGHTS</b></p> <ul style="list-style-type: none"> <li>• Efficacy of ILA outreach and provision of service</li> <li>• Firsthand knowledge of programmatic and systemic gaps</li> <li>• Recommendations to fill needs and increase accessibility that are informed by experience</li> <li>• Observation of ILA growth over the years</li> </ul>	<p><b>DIRECT TOUCH</b></p> <p><b>Staff &amp; Mentors</b></p> <p><b>BELIEFS</b></p> <ul style="list-style-type: none"> <li>• Families are at the center of ILA</li> <li>• DEI is essential to the organization's sustainability and to the efficacy of the work</li> <li>• ILA continuously evolves and demonstrates resiliency</li> <li>• ILA has a heart to address homelessness and support families</li> <li>• Work is a vehicle for making a difference</li> </ul> <p><b>PRIORITIES</b></p> <ul style="list-style-type: none"> <li>• Reaching, connecting, and empowering families effectively</li> <li>• Ensuring staff sustainability and mental health</li> <li>• Observing formal and uniform procedures and trainings for staff</li> <li>• Applying DEI internally and externally</li> <li>• Respecting families' human dignity, autonomy, and consent</li> <li>• Working to make a positive impact</li> </ul> <p><b>INSIGHTS</b></p> <ul style="list-style-type: none"> <li>• Interworkings of organizational structure and programmatic design</li> <li>• Identify practices and strategies that resonate with ILA clients and families</li> <li>• Service-provider perspective on systemic, institutional, and contractual parameters in serving families</li> <li>• Engagement in ongoing DEI work and reflections</li> <li>• Varied understanding of ILA history and growth</li> </ul>	<p><b>CLOSE SUPPORTERS</b></p> <p><b>Board, Donors &amp; Foundations</b></p> <p><b>BELIEFS</b></p> <ul style="list-style-type: none"> <li>• Some of the most important supports include: permanent affordable housing, support to sustain housing, improved economic mobility</li> <li>• The current situation is the result of crises on many levels.</li> </ul> <p><b>PRIORITIES</b></p> <ul style="list-style-type: none"> <li>• Supporting families</li> <li>• Outcomes and Impact</li> <li>• Building a strong team</li> <li>• Strong systems</li> <li>• Sustainability</li> <li>• Planning for the future, succession planning</li> <li>• Smart growth</li> </ul> <p><b>INSIGHTS</b></p> <ul style="list-style-type: none"> <li>• Connections across service providers and systems is key to success</li> <li>• This population is very complex and requires intense and comprehensive services</li> <li>• Disjointed systems for youth, families and individual unhoused</li> <li>• Systems and policy level: change is ultimately required; have to focus on what is local</li> <li>• Family homelessness does not have the same leadership eminence as individual leadership</li> </ul>	<p><b>COMMUNITY SUPPORTERS</b></p> <p><b>Faith-Based Partners and NPOs in the Field</b></p> <p><b>BELIEFS</b></p> <ul style="list-style-type: none"> <li>• Families are at the center of ILA</li> <li>• DEI is essential to the organization's sustainability and to the efficacy of the work</li> <li>• ILA continuously evolves and demonstrates Resiliency</li> <li>• ILA has a heart to address homelessness and support families</li> <li>• Work is a vehicle for making a difference</li> </ul> <p><b>PRIORITIES</b></p> <ul style="list-style-type: none"> <li>• Reaching, connecting, and empowering families effectively</li> <li>• Ensuring staff sustainability and mental health</li> <li>• Observing formal and uniform procedures and trainings for staff</li> <li>• Applying DEI internally and externally</li> <li>• Respecting families' human dignity, autonomy, and consent</li> <li>• Working to make a positive impact</li> </ul> <p><b>INSIGHTS</b></p> <ul style="list-style-type: none"> <li>• Interworkings of organizational structure and programmatic design</li> <li>• Identify practices and strategies that resonate with ILA clients and families</li> <li>• Service-provider perspective on systemic, institutional, and contractual parameters in serving families</li> <li>• Engagement in ongoing DEI work and reflections</li> <li>• Varied understanding of ILA history and growth</li> </ul>	<p><b>EXTERNAL EXPERTS</b></p> <p><b>Government &amp; Subject Matter Experts</b></p> <p><b>BELIEFS</b></p> <ul style="list-style-type: none"> <li>• Essential support for homeless families include:             <ul style="list-style-type: none"> <li>• Permanent affordable housing</li> <li>• Support to sustain housing</li> <li>• Improved economic mobility to increase employment opportunities</li> <li>• Improved outreach and participation in programs among at-risk families</li> </ul> </li> <li>• The current situation is the result of crises on many levels</li> </ul> <p><b>PRIORITIES</b></p> <ul style="list-style-type: none"> <li>• Using government funding to address overall homelessness</li> <li>• Setting up vehicles to spread funding to nonprofits</li> <li>• Creating policy to drive change</li> <li>• Higher visibility of family homelessness</li> <li>• Reduce silos across systems</li> <li>• Self-sufficient families</li> <li>• DEI</li> </ul> <p><b>ENVIRONMENTAL INSIGHTS</b></p> <ul style="list-style-type: none"> <li>• Upheaval and uncertainty around new government policies and spending</li> <li>• Unknown around COVID, government support for rental relief, and the lifting of the eviction moratorium</li> <li>• Monitoring the impact on families and the greater need for support</li> <li>• Disjointed systems for youth, families and individual unhoused</li> </ul>