



Strategic Plan 2025-2029

*Improving the
Quality of Life for
Individuals and Families*

Background

Established in 1972, SPIRITT Family Services is a community-based program designed to improve family bonding and communication, prevent substance abuse, and address mental health disorders. Today, we provide education intervention, treatment, and recovery programs, as well as offer basic needs support services, to over 12,500 individuals annually. Envisioning welcoming, safe, and healthy communities, our targeted services help families create stable home environments where all individuals particularly children and youth can thrive inside a safe and thriving family and community.

The development of this Plan involved a collaborative process to ensure that SPIRITT's strategies reflect the needs and aspirations of our stakeholders. To gather input and feedback, SPIRITT engaged a wide range of individuals and groups, including Board of Directors, employees, persons served, community partners, and other stakeholders. Through meetings, surveys, and environmental scans, SPIRITT ensures that the approach is informed by both internal insights and external factors shaping the landscape of health and human services.

Updated Mission, Vision, and Core Values

As SPIRITT Family Services enters a new chapter of growth and purpose, we are proud to share our updated mission, vision, and set of core values that reflect our unwavering commitment to access, healing, and resilience. Rooted in over five decades of service to the community, this evolution represents more than just words, it's a bold affirmation of who we are and where we're headed. Informed by the lived experiences of the families we serve and the dedication of our staff and partners, our Strategic Plan for 2025–2029 outlines the principles that guide us and the priorities that will propel our impact. With a renewed focus on collaboration, accountability, and innovation, SPIRITT is charting a clear path to expand opportunity, strengthen families, and build thriving communities for generations to come.

Our Vision

SPIRITT envisions a future where every individual and family thrives within vibrant, welcoming communities, supported by sustainable resources and opportunities that enhance the well-being of all.

Our Mission

SPIRITT's mission is to promote individual and family wellness through compassionate, trauma-informed support and care, fostering healing, resilience, and thriving communities.

Our Core Values

Respect

- Treating every individual with kindness, empathy, and consideration

- Actively listening to diverse perspectives and honoring lived experiences
- Creating inclusive environments where all voices are valued and heard

Integrity

- Upholding the highest ethical standards across all practices
- Acting with honesty, transparency, and accountability
- Building trust through consistent and principled behavior

Compassion

- Approaching every interaction with empathy and care
- Supporting individuals with patience during life's most difficult moments
- Cultivating a culture of emotional intelligence and understanding

Collaboration

- Believing in the power of collective action to drive change
- Partnering across disciplines, sectors, and communities
- Encouraging teamwork and shared success

Excellence

- Striving for the highest standards in service and stewardship
- Committing to continuous learning, innovation, and improvement
- Celebrating achievements while relentlessly pursuing better outcomes

Strategic Plan 2025–2029: Building on Strength.

To advance our vision and adapt to the evolving needs of our communities, SPIRITT has developed a bold and thoughtful Strategic Plan for 2025–2029. Shaped through collaboration with staff, board members, families served, and community partners, the plan provides a clear framework to guide our growth and deepen our impact.

Strategic Priorities & Goals

1. **Enhance Outreach, Information, and Assistance:** Expand communication channels and increase visibility so that individuals and families can easily access timely, accurate information about SPIRITT's services.
2. **Increase Social Supports and Connections:** Strengthen community engagement efforts and create opportunities that foster belonging, emotional support, and mutual assistance.
3. **Enhance Integrated Service Delivery:** Improve coordination across programs to deliver seamless, holistic services that are responsive to each family's unique strengths and challenges.
4. **Strengthen Partnerships:** Cultivate new and deeper collaborations with public systems, nonprofit organizations, educational institutions, and healthcare providers to extend SPIRITT's reach and capacity.

5. **Strengthen Organizational Capacity:** Invest in staff, infrastructure, and operational systems to enhance sustainability, service quality, and innovation.
6. **Advance Data-Driven Impact and Accountability:** Establish a comprehensive outcomes measurement and reporting system to evaluate program effectiveness, guide service improvements, and build stakeholder trust.

Intended Impact & Theory of Change

SPIRITT Family Services is dedicated to supporting the well-being of children, youth (ages 0–21), families, and adults in Eastern Los Angeles County, specifically within Service Planning Areas (SPAs) 3 and 7 (see Appendix 4). Our participants often face complex, interrelated challenges—such as child abuse and neglect, intimate partner violence, trauma, poverty, isolation, housing instability, and mental health and substance use disorders. We prioritize those at greatest risk, offering proactive support to prevent crises and promote stability. SPIRITT’s strength lies in our flexible, community-centered approach: we bring services directly to families through field-based, in-home, and on-site programs at our Family Centers, while also expanding access through telehealth and virtual platforms. By meeting families where they are—both physically and emotionally—we ensure culturally responsive, trauma-informed care is not just available, but accessible and rooted in trust.

How We Achieve Impact

SPIRITT Family Services achieves lasting impact by delivering trauma-informed, family-centered care through two core program divisions designed to address both the symptoms and root causes of adversity. With a culturally and linguistically responsive approach, each program prioritizes accessibility, empowerment, and prevention—ensuring families receive the support they need to thrive.

1. Child and Family Well-Being Services

Funded by the Department of Children and Family Services (DCFS), these prevention and early intervention programs work proactively to strengthen families before crises escalate. The focus is on building protective factors that reduce the risk of child welfare involvement, promote safe caregiving, and support long-term family stability:

- **Prevention and Aftercare (P&A):** Provides comprehensive needs assessments, parenting education, and connections to critical resources for families at risk across all age groups.
- **Partnerships for Families (PFF):** Delivers intensive, in-home services for expectant parents and families with children ages 0–5, offering parenting support, IPV intervention, and mental health referrals.
- **Relative Support Services (RSS):** Equips formal and informal kin caregivers with case management, educational workshops, and navigation tools to support child safety and permanency.

These programs weave together emotional support, financial assistance, and linkage to services like housing and healthcare—creating nurturing environments where children can safely grow and caregivers are empowered.

2. Community Behavioral Health Services

Supported by the Departments of Mental Health and Public Health, this division provides accessible, evidence-based behavioral health and substance use treatment for individuals and families across the lifespan:

- Outpatient Mental Health Services: Offers trauma-informed individual, group, and family therapy alongside psychiatric evaluation and medication support to improve emotional and behavioral outcomes.
- Wraparound Program: Facilitates intensive, youth-focused care teams that stabilize high-needed youth in their homes and communities by blending clinical, educational, and familial support.
- Outpatient Substance Use Treatment (Drug Medi-Cal Certified): Serves youth and adults with prevention, treatment, and recovery support that's culturally responsive and tailored to the client's unique life context.

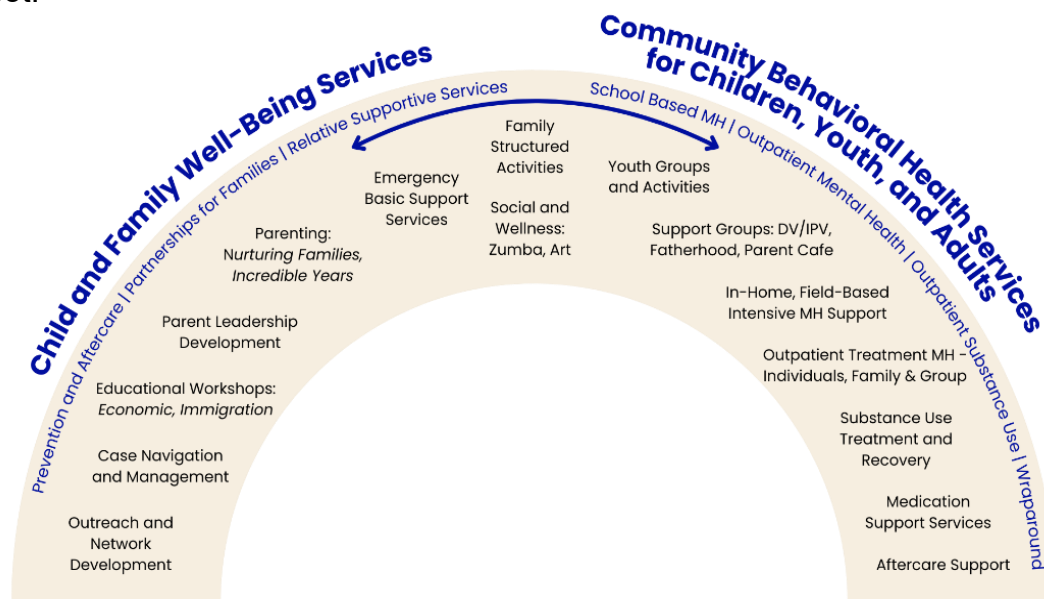
Together, these services not only treat individual challenges but strengthen family systems, enhance emotional resilience, and promote long-term community wellness. SPIRITT's dual-program model ensures a continuum of care that uplifts participants at every stage of life—ensuring no one faces healing or hardship alone.

Snapshot of SPIRITT's Core Los Angeles County Funded Programming



Trauma-Informed, Family-Centered Continuum

SPIRITT Family Services embraces a holistic, trauma-informed approach that looks beyond surface symptoms to confront the underlying systemic, relational, and emotional challenges families face. At the heart of every service plan is the family unit as the primary agent of transformation—honoring the belief that sustainable change begins at home. Each plan is carefully tailored to reflect the unique lived experiences, cultures, and strengths of those we serve, ensuring that care is both relevant and respectful. By providing individualized, wraparound supports—ranging from therapeutic services to parenting education and basic needs assistance—SPIRITT empowers families not just to recover, but to rebuild. This approach fosters healing, strengthens relationships, and equips families to thrive in safe, nurturing environments where hope and opportunity can take root.



This model is infused across all programs, ensuring that services are not only therapeutic but also empowering, responsive, and rooted in the cultural identities of the community.

What We Aim to Achieve

At SPIRITT Family Services, our vision for thriving families is guided by a deep commitment to building protective factors that lay the foundation for long-term well-being. We seek to cultivate communities where children and adults are not only physically safe but emotionally supported, socially connected, and economically empowered. To achieve this, we strengthen the emotional health of individuals across the lifespan, equip caregivers with essential parenting knowledge, and nurture resilience in the face of life's challenges. Our services foster meaningful connections—within families and with the broader community—while ensuring access to fundamental resources like housing, food, healthcare, and education. By expanding opportunities for economic mobility and workforce development, we create conditions where families can break cycles of hardship and shape futures filled with promises. This holistic approach advances our goal: vibrant, self-sustaining families who thrive in nurturing environments and contribute to the strength of their communities.

APPENDIX 1.
STRATEGIC PLAN FOR FIVE KEY GOALS, OBJECTIVES AND
KEY PERFORMING INDICATORS

Goal 1: Enhance Outreach, Information and Assistance

We will expand our outreach efforts and improve access to accurate, timely information and assistance to ensure individuals and families are aware of and can utilize the services available to them.

Objective 1.1: Improve SPIRITT's brand visibility by expanding participation and improving the accessibility of information across both internal and external platforms.

Strategies:	KPI's
1.1.1 - Apply the SPIRITT palette consistently across digital, print, and physical channels, and train your team to follow the standards. Use design tools and templates to enforce consistency, audit regularly to ensure alignment, and only update the palette during strategic rebranding efforts.	• % of programs adhering to brand guidelines in their materials • Monitor likes, shares, and comments on branded content across platforms
1.1.2 – Expand virtual engagement and increase activity across web-based platforms (e.g., live streaming, Instagram, Facebook, Constant Contact).	• % Growth in followers/subscribers across platforms • % Engagement metrics (likes, shares, comments)
1.1.3 – Develop and streamline secure, user-friendly, and accessible web-based client portals—such as a mobile app and mass texting platform.	• Number of tools implemented • Number of engaged participants/community members
1.1.4 – Organize targeted outreach campaigns (i.e., substance abuse treatment, schools, harm reduction agencies, county, DCFS, court).	• Number of outreach efforts • Number of community workers/<i>promotoras</i> and navigators conducting outreach

Goal 2: Increase Social Supports and Connections (to Reduce Social Isolation)

We will foster opportunities for individuals and families to build meaningful relationships and supportive networks that promote emotional well-being and community engagement.

Objective 2.1: Expand Peer Support and Community-building programs

Offer ongoing in-person and hybrid support groups for youth, adults, and families to reduce isolation, foster peer connection, and encourage emotional expression in a safe, welcoming environment.

Strategies:	KPI's
2.1.1 - Develop an agency Parent Café and other peer series implementation plan.	• Number of Café or peer sessions held annually • Number of Participants • Participant satisfaction and perceived emotional support (via surveys)
2.1.2 - Offer small group, supportive workshops and peer groups that foster social connection and provide essential family supports—such as childcare, meals, and resource navigation—to create a welcoming and inclusive environment for community engagement.	• % of Protective Factor Survey Results • Number of intergenerational events hosted • Number of participants • Participant satisfaction and perceived emotional support (via surveys)
2.1.3 - Establish a Parent Advisory Committee to empower families as active partners in shaping programs, fostering leadership, and strengthening community engagement within the nonprofit.	• Track parent participation, retention, and the implementation of their feedback to measure the committee's impact on program development and community engagement.

Goal 3: Enhance Integrated Service Delivery

We will streamline and coordinate our services across programs to provide holistic, client-centered support that addresses the diverse needs of those we serve.

Objective 3.1: Improve agency internal referral process for both internal and external participant linkages by implementing a centralized tracking system to ensure timely and effective connections to services.

Strategies:	KPI's
3.1.1 - Streamline internal referral process and communication by developing Policies and Procedures	• % Client Satisfaction • time/days from referral to service connection • % of Client Engagement
3.1.2 - Enhance Staff training on agency referral processes.	• Number of staff trained on referral protocols

Objective 3.2: Achieve ECM provider status by December 1, 2025, to enhance coordinated referrals and access to community-based services.

Strategies:	KPI's
3.2.1 - Contract with Full Circle Health Network to streamline agency infrastructure and connection between agency and Managed Care Plans.	• ECM certification achieved by target date • Number of clients enrolled in ECM services • Increase in coordinated care plans developed • Client outcomes and satisfaction with ECM services

Objective 3.3: Ensure individuals and families can access case navigation, mental health services, and other supportive resources that promote stability and strengthen social ties.

Strategies:	KPI's
3.3.1 -	• Number of individuals served through case navigation • Average time from referral to service connection • Client-reported improvements in social support and stability • Increase in cross-referrals between programs

Objective 3.4: Design and implement a cross-disciplinary care model by June 30, 2026, that integrates clinical services, case management, and family support to address co-occurring and specialized needs in a seamless, coordinated manner.

Strategies:	KPI's
3.4.1 - Advance integration of primary care, mental health and SUD	• Completion and rollout of integrated care model framework • Number of staff trained in the new model • Increase in clients receiving multi-disciplinary services • Client satisfaction with care coordination

Objective 3.5: Expand access to comprehensive, family-centered services by launching new programs or expanding existing ones by June 30, 2029, with a focus on underserved regions, youth services, and housing assistance.

Strategies:	KPI's
3.5.1 – Apply to BHSA in both geographic area (SPA 3 and 7) Grants by 2027 and other population specific program including youth and fatherhood.	• Number of new or expanded programs launched • Increase in youth and housing-related service utilization • Community feedback on service accessibility
3.5.2 – Increase youth services across the agency	• Number of activities for youth • Increased attendance • Feedback on activities

Objective 3.6: Develop and implement a data-driven impact measurement system by December 31, 2025, to track client outcomes, inform continuous improvement, to better prepare for Value-Based Care and communicate results to stakeholders.

Strategies:	KPI's
3.6.1 – Assess and compare EHR systems capabilities	• Completion and deployment of an impact measurement system • Percentage of programs reporting outcomes quarterly • Number of data-informed program improvements implemented • Stakeholder engagement with impact reports

Goal 4: Strengthen Partnerships

We will cultivate and deepen collaborations with community organizations, public agencies, and stakeholders to enhance service impact and resource sharing.

Objective 4.1: Forge and deepen partnerships with schools, healthcare systems, housing providers, and justice agencies to deliver integrated, wraparound services that promote long-term recovery, family stability, and holistic well-being.

Strategies:	KPI's
4.1.1 – Enhance usage of formal agreements with community partners who have existing service provider directories/online portals (i.e., Unite Us, One Degree, Findhelp).	• Number of formal agreements • Percentage increase in families receiving services through partner referrals
4.1.2 Establish formal agreements with (i.e., schools, harm reduction agencies).	• Number of formal MOU's •

4.1.3. Increase participant subscription to SPIRITT's monthly newsletter	Percentage increase in families receiving newsletters
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Objective 4.2: Diversify SPIRITT's funding portfolio by increasing non-government revenue by 6% by June 30, 2029, reducing reliance on single funding streams and enhancing financial sustainability.

Strategies:	KPI's
4.2.1 -	- Percentage of total revenue from non-government sources - Number of new private funders or philanthropic partners secured - Amount of funding raised through grants, donations, or corporate sponsorships - Year-over-year growth in unrestricted funding Increase revenue diversity by 6% through non-government funding by June 30, 2029, ensuring SPIRITT is less dependent on any single funding source.

Objective 4.3: Expand co-located and field-based services at SPIRITT Family Centers and partner sites by June 30, 2027, to improve accessibility, reduce stigma, and streamline care coordination.

Strategies:	KPI's
4.3.1 -	- Number of co-located service sites established or enhanced - Increase in clients served through field-based or co-located services - Reduction in average wait time for behavioral health and family support services - Client satisfaction and access ratings (via post-service surveys)

Goal 5: Strengthen Organizational Capacity

We will invest in our staff, infrastructure, and operational systems to enhance sustainability, service quality, and innovation.

Objective 5.1: Enhance workforce stability and satisfaction by increasing staff retention by 10 % by June 30, 2029, and reducing average time-to-fill for vacancies to 30 days through targeted recruitment, onboarding, and employee wellness initiatives.

Strategies:	KPI's
5.1.1 – Enhance staff professional development opportunities	• Annual staff retention rate • Average time-to-fill for open positions • Employee satisfaction and engagement scores (via annual survey) • Participation rate in professional development and support programs
5.1.2 – Implement Staff Wellness Activities	• Annual staff retention rate • Average time-to-fill for open positions • Employee satisfaction and engagement scores (via annual survey) • Participation rate in professional development and support programs

Objective 5.2: Implement standardized quality assurance systems across all programs by June 30, 2029, ensuring 90% of relevant staff are trained and compliant with updated policies and procedures.

Strategies:	KPI's
5.2.1 – Improve, streamline, and centralize program policies and procedures.	• Percentage of programs with documented QA protocols • Percentage of staff trained in QA procedures • Number of internal audits conducted annually • Compliance rate with QA standards

Objective 5.3: Upgrade and unify the Electronic Health Records System (EHRS) and performance dashboard by June 30, 2026, enabling real-time data tracking and quarterly reporting to inform strategic decisions.

Strategies:	KPI's
5.3.1 – Secure a funding to upgrade agency electronic health record system	• Completion of EHRS implementation milestones • Percentage of programs using the new EHRS • Frequency and quality of quarterly performance reports • User satisfaction with EHRS functionality

Objective 5.4: Secure funding and a permanent facility by June 30, 2029, to support long-term organizational stability and expand service capacity.

Strategies:	KPI's
5.4.1 – Apply to BHSA - Behavioral Health Continuum Infrastructure Program (BHCIP) Round 2 – for a Community Resource Center or Wellness Center (based on community needs assessment).	• Amount of funding secured for facility acquisition • Completion of facility acquisition milestones • Increase in service capacity post-acquisition • Stakeholder satisfaction with new facility planning and implementation

6. **Advance Data-Driven Impact and Accountability:** Establish a comprehensive outcomes measurement and reporting system to evaluate program effectiveness, guide service improvements, and build stakeholder trust.

Objective 6.1:

Strategies:	KPI's
6.1.1 Co-design outcome measures with staff and clients to ensure relevance and clarity.	• Develop and implement tools for capturing and analyzing client outcomes. • Use data insights to inform program design and strategic decisions. • Promote transparency through regular reporting and storytelling. • Engage stakeholders with evidence of impact and progress.

These goals are designed to guide SPIRITT in its continued commitment to excellence, sustainability, and meaningful community impact. The Plan will be reviewed annually by Board of Directors, SPIRITT leadership, and staff to assess progress and will be updated as needed.

APPENDIX 2.

STRATEGIC PLANNING AREAS OF CONSIDERATION

In developing this Strategic Plan, SPIRITT considered the following areas to determine the organization's future goals and objectives.

Expectations of Persons Served

- Participant Survey Results
- Participant Strategic Planning Survey
- Yearend Participant Report

Expectations of Other Stakeholders

- Employee Survey Results
- Employee Strategic Planning Survey
- Stakeholders Strategic Planning Survey

The Competitive Environment

- Community Partners' Core Services in SPIRITT's Service Areas
- Total Annual Revenue Market Analysis
- Year-Over-Year Growth Rate Market Analysis

Financial Opportunities

- SPIRITT's Funding Sources
- SPIRITT's Financial Position
- SPIRITT's Yearend Financial Standing
- Feedback from Stakeholders

Financial Threats

- SPIRITT's Actual and Projected Agency Budget

The Organization's Capabilities

- Strategic Planning Survey
- Feedback from Stakeholders

Social Determinants of Health

- SPIRITT's Community Needs Assessments
- 2022 CHNA PIH Health Hospital – Whittier
- 2022 CHNA Kaiser Foundation Hospital – Downey

- 2021 CHNA Pomona Valley Hospital
- 2022 CHNA, Kaiser Foundation Hospital – Baldwin Park
- 2022 CHNA, City of Hope Hospital – Duarte
- 2022 CHNA, Emanate Health

Demographics of the Service Area

- Yearend Participant Report – Demographics
- Participant Survey – Demographics

The Organization's Relationship with External Stakeholders

- Stakeholders Strategic Planning Survey

The Regulatory Environment

- Audits, Certifications, Government Regulations

The Legislative Environment

- Paid Memberships (ACHSA, CAADPE, CACFS, CRCA)
- Sarbanes-Oxley Act of 2002
- Department of Labor
- Attorney General's Guide for Charities
- Department of Justice

The Use of Technology to Support 1) Efficient Operations, 2) Effective Service Delivery, 3) Performance Improvement

- Technology Policies and Procedures (including Assessment, Action Plan, etc.)

Information from the Analysis of Performance

- Special Incident Report Analysis
- Employee Data (new hires, terminations, total employees, retention, turnover)
- Accessibility Plan
- Cross-Cultural Humility Plan
- Risk Management Plan
- Performance Improvement Plans
- Technology Policies and Procedures Manual
- Health and Safety Analysis (emergency drills, building inspections, etc.)

APPENDIX 3.

ENVIRONMENTAL SCANS

Data from each of the following areas of consideration was reviewed with SPIRITT's leadership to ensure all were addressed to help identify goals and objectives for this Strategic Plan – Appendix 1:

- Expectations of persons served
- Expectations of other stakeholders
- The competitive environment
- Financial opportunities
- Financial threats
- The organization's capabilities
- Social determinants of health
- Demographics of the service area
- The organization's relationship with external stakeholders
- The regulatory environment
- The legislative environment
- The use of technology to support
 - Efficient operations
 - Effective delivery service
 - Performance improvement
- Information from the analysis of performance

Persons Served Demographics

In the Fiscal Year 2023-24, SPIRITT served 4,382 families, which includes 12,500 individuals (children, youth, adults, and caregivers). Of all the families, 71% reported English as their primary language, followed by 29% reported Spanish. 64% of all individuals identify as Latino, 22% White, 6% African-America, 1% Asian, <1% Pacific Islander, <1% Native American. 43% of all individuals were adults and 57% were children/adolescents. 39% of all individuals were male and 61% were female. Less than 1% of all individuals identified to be part of the LGBTQ+ community. Of all the individuals, 15% were ages 0-5, 19% 6-11, 11% 12-14, 10% 15-17, 2% 18-20, 4% 21-25, 22% 26-44, 13% 45-64, and 1% 65+. The top five cities served were Whittier (16%), Los Angeles (13%), Bell Gardens (9%), El Monte/South El Monte (6%), and Bellflower (6%).

According to SPIRITT's Participant Survey, distributed in December 2024 (n=142), 43% reported to be married or partnered, and the remaining 58% reported to be in a single household (including single, separated, divorced, and widowed). Of the 142 respondents, 13% own a home, 71% rent, and the remaining 16% either have shared housing, temporary (motel, shelter, staying with friends), or currently experiencing homelessness. 47% of families have a household size of 5+, 64% have an annual household income of \$30,000 or less, and 59% receive 2 or more government assistance programs (top four types were Medi-Cal, CalFresh, CalWORKs/TANF, and WIC. 36% are working full-time or are self-employed, 20% part-time or seasonal, 40% unemployed, and 3% retired. Lastly, 50% of respondents have received no higher than a high school diploma or GED.

Additionally, the Participant Survey included questions regarding SPIRITT's Strategic Plan. Feedback from all stakeholders (participants, employees, other stakeholders) were combined and analyzed – see Appendix 5.

Personnel Demographics (as of March 1, 2025)

87% of employees are Latino/Hispanic, 4% are Asian, 7% White (Non-Hispanic/European American), 1% African American, and 1% reported as “Other.” 82% of SPIRITT staff are bilingual. Most of our staff are English/Spanish speakers; we also have staff who speak 3% Arabic, 1% Cantonese, 1% Mandarin, 1% Vietnamese. 88% are female and 12% are male. 14% are in their 20s, 46% are in their 30’s, 22% are in their 40s, 12% are in their 50s, 5% are 60+, and 0% were under the age of 20. 28% of SPIRITT staff have master’s degrees, 23% have bachelor’s degrees, 8% have an associate degree, and 25% have a high school diploma. SPIRITT has 28 professional staff licensed or licensed eligible with the California’s Board of Behavior Science.

SPIRITT Family Services has made significant strides in stabilizing employee retention following a period of elevated turnover driven by organizational layoffs. In 2022 and 2023, layoffs accounted for 19% and 30% of total terminations, respectively, contributing not only to direct staff reductions but also to increased voluntary departures, as employees perceived instability and sought advancement opportunities elsewhere. Encouragingly, by 2024, the turnover rate declined to 19%, returning to pre-layoff levels. This improvement is attributed to the absence of layoffs and the agency’s proactive efforts to enhance employee benefits, including additional paid holidays and strengthened retirement contributions. Looking forward, SPIRITT is committed to sustaining this progress through strategies such as cross-training, internal mobility, succession planning, and salary benchmarking to remain competitive. With a target retention rate of 85%—reflecting a healthy 15% turnover, SPIRITT continues to invest in its workforce as a cornerstone of operational excellence and service continuity.

Feedback from employees was analyzed and combined with other stakeholders (participants, Board, Advisory, etc.) – see Appendix 5.

Stakeholders (Board and Advisory Board)

As of January 1, 2025, SPIRITT Family Services’ governance and advisory bodies reflect a broad spectrum of professional expertise and lived experience, underscoring the organization’s commitment to all-encompassing, community-rooted leadership. The Board of Directors, composed of eight members, brings a rich blend of knowledge across non-profit management, finance, education, entrepreneurship, health, law, mental health, and real estate. Demographically, the board is 63% male and 38% female, with 50% identifying as Latino, 25% White, 13% African American, and 13% Asian. Age diversity is also present, with half of the board aged 65 or older, and the remaining split evenly between those aged 35–50 and 51–65. Meanwhile, the Advisory Board, totaling nine members, is 89% female and 78% Latino, representing key sectors including early childhood education (0–5), nonprofit service delivery, health, and K–12/higher education.

Feedback from stakeholders (community partners, Board, Advisory, funders, community members, etc.) was analyzed and combined with other stakeholders (participants, employees, etc.) – see Appendix 5.

Response to Internal and External Factors and/or Trends

In response to the COVID-19 pandemic, SPIRITT demonstrated agility and resilience by swiftly transitioning to virtual and telephonic services, ensuring continued support for families through education, case management, and counseling. This shift led to a significant increase in service reach, with families served rising from 517 to 1,288 between March 2020 and May 2021. Despite operational challenges such as staffing shortages, high turnover, and rising program costs, SPIRITT maintained essential services through hybrid models and outdoor community events. The organization also used this period to reassess its strategic priorities and restructure programs for long-term sustainability. Additionally, SPIRITT is addressing the growing public health concern of social isolation, particularly among older adults, by exploring evidence-based interventions like group activities, cognitive behavioral therapy, and personalized care plans. By integrating validated assessment tools and collaborating with community partners, SPIRITT aims to mitigate the health risks associated with loneliness and enhance overall well-being in the populations it serves.

Funding and Policy Changes: SPIRITT Family Services has continued to demonstrate financial resilience and adaptability in the face of both internal restructuring and external policy shifts. As of May 2025, SPIRITT successfully completed full repayment of its Paycheck Protection Program (PPP) loan, marking a major milestone in the organization's financial recovery and stabilization. While the repayment process introduced temporary cash flow constraints, SPIRITT's strategic financial planning—bolstered by reserve funds and efficient resource reallocation—ensured uninterrupted service delivery and positioned the agency for renewed growth. This fiscal achievement enhances SPIRITT's capacity to reinvest in programs that directly impact the well-being of children, youth, and families across Los Angeles County.

In response to shifting community needs and economic conditions, SPIRITT has implemented clear program criteria to guide leadership decision-making, ensuring that all investments are aligned with mission-driven outcomes and organizational sustainability (see Appendix 6). Table 1. Individuals Served by SPIRITT's Program Divisions reflects a year-over-year decrease in individuals served within both Community Behavioral Health and Child and Family Well-Being Services, primarily due to the strategic closure of programs following a comprehensive service and resource analysis.

Table 1. Individuals Served by SPIRITT's Program Divisions

Fiscal Year	Number of Participants Served		
	Community Behavioral Health	Child and Family Well-Being	TOTAL
FY2021-2022	1,697	14,236	15,933
FY2022-2023	185	12,846	13,031
FY2023-2024	290	12,210	12,500
TOTAL	2,172	39,292	41,464

In 2025, California is undergoing sweeping reforms across behavioral health, child welfare, and immigrant services, reshaping how care is delivered and funded. At the forefront is **Proposition 1**, which modernizes the Mental Health Services Act into

the Behavioral Health Services Act (BHSA), expanding services to include substance use disorders and prioritizing youth, veterans, and unhoused individuals. Backed by a \$6.4 billion bond, it mandates counties to develop equity-focused behavioral health plans and offers providers new funding and innovation opportunities. Simultaneously, the Family First Prevention Services Act (FFPSA) shifts child welfare funding toward prevention, requiring providers to adopt evidence-based models and collaborate across sectors to access federal support. Medi-Cal reforms, particularly the BH-CONNECT Demonstration, further expand behavioral health coverage and housing supports, especially in Los Angeles County, supported by a \$1.9 billion workforce initiative.

In tandem, SPIRITT is navigating these changes through the implementation of CalAIM (California Advancing and Innovating Medi-Cal), which is transforming behavioral health service delivery. The shift from cost-based reimbursement to fee-for-service (FFS) strengthens SPIRITT's financial sustainability, while new funding streams like Enhanced Care Management (ECM) and Community Supports enable expanded services. However, capitalizing on these opportunities requires major investments in infrastructure, technology, and staff to meet compliance standards. CalAIM's whole-person care model is also prompting SPIRITT to enhance coordination across behavioral, medical, and social support, and to address social determinants of health through innovative, evidence-based strategies.

At the same time, federal policy shifts—including cuts to public health funding, efforts to scale back DEI initiatives, and increased immigration enforcement—pose serious challenges. With 77% of SPIRITT's funding federally sourced through County contracts, these changes threaten financial stability and community trust, particularly among immigrant and marginalized populations. These dynamics demand that SPIRITT remain vigilant, responsive, and deeply engaged in advocacy to uphold its mission of inclusive, trauma-informed care.

Together, the conclusion of the PPP loan, the evolving CalAIM framework, and shifting federal policies underscore the urgency of strategic, mission-aligned financial planning. SPIRITT remains committed to adapting its programs, strengthening operational capacity, and advocating for equitable systems to ensure that every family it serves continues to receive high-quality care—even amid uncertainty.

Competitive Environment

A competitive analysis was also completed comparing 11 community-based organizations. SPIRITT has a strong foundation in addressing the needs of vulnerable populations through a diverse and comprehensive range of services, ranging from mental health, youth programs, and substance use disorders. Its ability to offer integrated, holistic care distinguishes it from competitors with more specialized service models. SPIRITT's strong community presence, culturally responsive approach, and bilingual staff enhance accessibility for diverse populations and contribute to its reputation as a trusted provider.

Chart 1. Community Partners Core Services

Agency Name	Service Planning Area (SPA)	Mental Health	Harm Reduction Services	Substance Use Disorder	Intimate Partner Violence (IPV)	Residential	Child Welfare Prevention	Foster Care	Early Education	0-5 Services	Youth Programs	Community Development	Economic Development	Homeless Assistance	Housing Assistance	Financial Assistance	Food Bank/Food Assistance	Crisis Intervention	Total Services
SPIRITT Family Services	3/7	✓		✓	✓		✓			✓	✓	✓	✓		✓	✓	✓		11
Foothill Family Services	3	✓					✓		✓	✓	✓								5
Five Acres	3	✓				✓	✓	✓			✓								5
Social Model Recovery	3	✓		✓							✓								3
Tri-City Mental Health Center	3	✓									✓				✓			✓	4
Penny Lane Centers	7	✓	✓	✓			✓	✓			✓				✓				7
Human Services Association	7				✓					✓								✓	4
The Whole Child	7	✓									✓			✓	✓				4
Helpline Youth Counseling	7	✓		✓			✓				✓	✓		✓					6
Pacific Clinics	3/7	✓		✓					✓	✓	✓			✓				✓	8
Alma Family Services	3/7	✓	✓				✓		✓	✓	✓	✓							7
Hillsides	3/7	✓				✓	✓	✓	✓	✓	✓								7

The growth rates of these agencies reflect factors like funding changes, government policies, and community needs. Agencies like Pacific Clinics (28% average growth) and The Whole Child (16% average growth) benefitted from increased funding or favorable policies, with Pacific Clinics showing a 67% growth between FY 2021-22 and FY 2022-23.

Chart 2. Total Annual Revenue Market Analysis

Agency Name	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24
SPIRITT Family Services	\$ 10,866,882	\$ 12,428,221	\$ 12,135,649	\$ 8,935,374	\$ 9,742,418
Foothill Family Services	\$ 29,407,723	\$ 30,217,580	\$ 29,208,924	\$ 34,168,003	\$ 35,345,621
Five Acres	\$ 47,860,211	\$ 42,399,955	\$ 38,374,651	\$ 43,509,706	\$ 46,560,128
Social Model Recovery	\$ 21,184,759	\$ 21,170,749	\$ 20,887,906	\$ 22,130,345	-
Tri-City Mental Health	\$ 10,081,180	\$ 11,245,901	\$ 10,264,291	\$ 12,298,944	-
Penny Lane Centers	\$ 59,200,085	\$ 56,218,978	\$ 57,327,728	\$ 54,105,621	\$ 62,518,651
Human Services Association	\$ 23,473,939	\$ 24,099,562	\$ 28,133,073	\$ 30,761,226	\$ 34,372,140
The Whole Child	\$ 25,053,244	\$ 17,433,122	\$ 18,989,759	\$ 24,518,283	\$ 38,202,975
Helpline Youth Counseling	\$ 7,476,422	\$ 9,232,155	\$ 11,256,000	\$ 11,553,740	-
Pacific Clinics	\$ 109,179,777	\$ 150,739,919	\$ 147,095,784	\$ 245,366,975	\$ 267,467,729
Alma Family Services	\$ 19,557,556	\$ 20,653,083	\$ 20,590,244	\$ 18,667,621	-
Hillsides	\$ 51,222,362	\$ 51,771,294	\$ 47,926,495	\$ 38,692,135	\$ 50,748,962

Chart 3. Year-Over-Year Growth Rate Market Analysis

Agency Name	FY 2019-20 to FY 2020-21	FY 2020-21 to FY 2021-22	FY 2021-22 to FY 2022-23	FY 2022-23 to FY 2023-24	Average Growth Rate
SPIRITT Family Services	14%	-2%	-26%	9%	-1%
Foothill Family Services	3%	-3%	17%	3%	5%
Five Acres	-11%	-9%	13%	7%	0%
Social Model Recovery	0%	-1%	6%	-	2%
Tri-City Mental Health	12%	-9%	20%	-	8%
Penny Lane Centers	-5%	2%	-6%	16%	2%
Human Services Association	3%	17%	9%	12%	10%
The Whole Child	-30%	9%	29%	56%	16%
Helpline Youth Counseling	23%	22%	3%	-	16%
Pacific Clinics	38%	-2%	67%	9%	28%
Alma Family Services	6%	0%	-9%	-	-1%
Hillsides	1%	-7%	-19%	31%	1%

In contrast, SPIRITT Family Services and Five Acres experienced volatility. SPIRITT had a -1% average growth, with a -26% dip from FY 2021-22 to FY 2022-23, due to funding reductions and right sizing the organization. Economic factors and the pandemic contributed to these declines, especially for Five Acres.

Agencies like Human Services Association and Helpline Youth Counseling likely grew due to rising demand for mental health and family services. The Whole Child's recovery in FY 2022-23 may reflect a growing focus on child welfare. Agencies that adapted to funding and policy shifts, such as Pacific Clinics and The Whole Child, showed positive growth, while SPIRITT faced challenges affecting its performance.

APPENDIX 4.

SPIRITT FAMILY CENTERS AND SERVICE AREAS

SPIRITT has three safe, welcoming Family Centers in South El Monte, Whittier, and Bell Gardens, where strength-based, trauma-informed, and family-centered services are provided to vulnerable families and individuals across southeastern Los Angeles County and the San Gabriel and Pomona Valleys.

- South El Monte Family Center: 2000 Tyler Avenue, South El Monte CA 91733
- Whittier Family Center and Administration: 8000 Painter Avenue, Whittier CA 90602
- Bell Gardens Family Center: 7208 Garfield Avenue, Bell Gardens CA 90201
- Administration: 2014 Tyler Avenue, South El Monte CA 91733

Chart 4. Map of SPIRITT Family Centers Within LA County Service Planning Areas (indicated by ☆ below)



APPENDIX 5.

SUMMARY OF STRATEGIC PLANNING SURVEY RESULTS

Introduction

The strategic planning process for SPIRITT Family Services' 2025-2029 plan commenced in early 2024, with a focus on gathering comprehensive feedback on our mission, vision, values, programmatic framework, and goals. To ensure a broad and inclusive perspective, we conducted a series of anonymous surveys between December 2024 and February 2025. These surveys targeted a diverse group of stakeholders, including participants (n=142), employees (n=74), and other key stakeholders such as Board members, Advisory members, community members, community partner organizations, and SPIRITT funders (n=60). In total, we collected 276 responses.

The primary objective of these surveys was to gather valuable insights and feedback on SPIRITT's framework, proposed mission, vision, values, and future direction. This input is crucial in shaping and guiding SPIRITT's Strategic Plan for 2025-2029. The results of these surveys were compiled, analyzed, and summarized in this report.

SWOT Analysis Summary

As part of our strategic planning process, we conducted a SWOT analysis to identify the strengths, weaknesses, opportunities, and threats facing SPIRITT Family Services. The analysis was informed by responses from our stakeholders, including participants, employees, and other key community members. The strengths identified include the SPIRITT team and teamwork, quality of services, community and participant-centered focus, commitment to quality services, and a welcoming environment. Weaknesses highlighted the need for additional services, improved community visibility and marketing, and challenges with workforce engagement and retention. Opportunities were seen in diversifying funding, expanding services and programs, forming collaborations, and enhancing community visibility and marketing. Threats included potential policy and funding changes, gaps in strategic partnerships, technological advancements, and environmental safety risks near SPIRITT locations.

Strengths (Responses from 147 of 276 surveyed):

SPIRITT Team and Teamwork: Our team is recognized for being encouraging, flexible, and maintaining strong communication.

Quality of Services: We are committed to delivering high-quality services.

Community and Participant Centered: Our focus remains on the community and participants we serve.

Commitment to Quality Services: There is a strong dedication to maintaining the quality of our services.

Environment: The morale and welcoming atmosphere at SPIRITT are highly valued.

Weaknesses (Responses from 121 of 276 surveyed):

Need for Additional Services: There is a demand for more workshops on housing, mental health, and employment.

Community Visibility and Marketing: We need to improve our outreach and marketing efforts, both in print and digital formats.

Workforce Engagement & Retention: Challenges include salaries, burnout, and employee appreciation.

Opportunities (Responses from 120 of 276 surveyed):

Diversify Funding: There are opportunities to explore and secure diverse funding sources.

Open More Services/Programs: Expanding services such as tutoring, childcare, disability support, and immigration assistance.

Collaboration: Potential partnerships with schools, banks, and healthcare providers.

Community Visibility and Marketing: Enhancing outreach and digital marketing efforts.

Threats (Responses from 77 of 276 surveyed):

Policy/Funding Changes: Potential changes at the federal, state, and county levels could impact on our operations.

Strategic Partnership Gaps: Navigating a competitive environment with gaps in strategic partnerships.

Technology: Keeping up with technological advancements and their implications.

Environmental Safety Risks: Addressing risks such as substance use and violence near SPIRITT locations.

Proposed Mission, Vision, and Values

Overall, SPIRITT's stakeholders agree with our new, proposed mission, vision, and values. The survey results indicate strong support for SPIRITT Family Services' mission, vision, and core values, suggesting that the organization is moving in the right direction to positively impact children, youth, and their families. A significant majority of respondents either strongly agree or agree with the mission statement, which aims to nurture and strengthen the social, emotional, and physical well-being of families and communities, with 62% strongly agreeing and 29% agreeing. Similarly, the vision of a future where all individuals and families flourish in inclusive communities is also well-supported, with 62% strongly agreeing and 29% agreeing. The core values of respect, cultural humility, collaboration, inclusivity, and integrity resonate strongly with stakeholders, as evidenced by 63% strongly agreeing and 29% agreeing. These results highlight a shared commitment to SPIRITT's goals and a collective belief in the organization's direction and impact.

Combining the "Strongly Agree" and "Agree" scores, the average agreement rate is 91%. Among the different groups, participants showed the highest level of agreement with an average of 98% strongly agreeing or agreeing.

Chart 1. All Stakeholders Survey Results

This statement moves SPIRITT in the right direction to positively impact children/youth and their families.	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
Mission: To nurture and strengthen the social, emotional, and physical well-being of families and communities, so children and youth can thrive.	62%	29%	3%	1%	5%
Vision: SPIRITT envisions a future where all individuals and families flourish in inclusive communities supported by sustainable resources and opportunities for all to improve their quality of life.	62%	29%	4%	0%	5%
Core Values: Respect, Cultural Humility, Collaboration, Inclusivity, Integrity	63%	29%	3%	0%	5%

Employees followed with a 91% average, and other stakeholders, including Board members, Advisory members, community members, community partner organizations, and funders, had an 85% average. These results indicate a strong consensus and support for SPIRITT's direction and foundational principles.

Chart 2. Participant Survey Results

This statement moves SPIRITT in the right direction to positively impact children/youth and their families.	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
Mission: To nurture and strengthen the social, emotional, and physical well-being of families and communities, so children and youth can thrive.	75%	24%	1%	0%	0%
Vision: SPIRITT envisions a future where all individuals and families flourish in inclusive communities supported by sustainable resources and opportunities for all to improve their quality of life.	74%	23%	3%	0%	0%
Core Values: Respect, Cultural Humility, Collaboration, Inclusivity, Integrity	71%	28%	1%	0%	0%

Chart 3. Employee Survey Results

This statement moves SPIRITT in the right direction to positively impact children/youth and their families.	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
Mission: To nurture and strengthen the social, emotional, and physical well-being of families and communities, so children and youth can thrive.	44%	47%	9%	0%	0%
Vision: SPIRITT envisions a future where all individuals and families flourish in inclusive communities supported by sustainable resources and opportunities for all to improve their quality of life.	40%	51%	9%	0%	0%
Core Values: Respect, Cultural Humility, Collaboration, Inclusivity, Integrity	46%	46%	9%	0%	0%

Chart 4. Other Stakeholders Survey Results

This statement moves SPIRITT in the right direction to positively impact children/youth and their families.	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree
Mission: To nurture and strengthen the social, emotional, and physical well-being of families and communities, so children and youth can thrive.	66%	17%	0%	3%	14%
Vision: SPIRITT envisions a future where all individuals and families flourish in inclusive communities supported by sustainable resources and opportunities for all to improve their quality of life.	72%	14%	0%	0%	14%
Core Values: Respect, Cultural Humility, Collaboration, Inclusivity, Integrity	72%	14%	0%	0%	14%

Among all SPIRITT's stakeholders, there is a consensus that SPIRITT should explore and address offering more services and workshops. Specifically, stakeholders highlighted the need for services related to housing, mental health, parenting, recreation, early childhood (0-5), financial health, healthy foods, and teen/youth services. This feedback was gathered from 78 of the 276 stakeholders surveyed.

To measure and communicate its impact more effectively, stakeholders suggested that SPIRITT utilize various lines of communication. This includes mass texts, print and digital marketing (such as newsletters, social media, and the website), and in-person interactions. Additionally, distributing regular surveys was recommended to gather ongoing feedback and demonstrate impact. These insights were provided by 106 of the 276 stakeholders surveyed.

When reviewing the data from each group of stakeholders (participants, employees, and other stakeholders), two top objectives emerged for SPIRITT's 2025-2029 Strategic Plan. These objectives are to diversify programs and expand family-centered services, and to strengthen community partnerships with other community-based organizations. These priorities were consistently identified across all surveyed groups.

SPIRITT's Leadership Feedback: SPIRITT's leadership met in March 2025 to review data and reports regarding SPIRITT's Strategic Plan, including participant surveys, employee surveys, and stakeholders' surveys. Their feedback highlighted key areas for improvement, including visibility and outreach, fund development, workforce engagement and retention, community partnerships, and service quality. Leadership emphasized the importance of increasing the organization's presence in the community, attending collaborative meetings, and formalizing partnerships to strengthen relationships with other agencies. Expanding outreach efforts and tracking engagement were also noted as essential for growth.

Financial stability was another major focus, with suggestions to provide grant writing training, increase transparency in funding allocation, and explore alternative revenue sources such as corporate sponsorships and donor engagement. Leaders also stressed the need to diversify and expand family-centered services by securing additional contracts, applying for state and federal funding, and introducing new support services, such as legal assistance for families.

Workforce engagement and retention emerged as a critical area, with recommendations to enhance employee training, conduct regular salary reviews, and implement retention strategies like internal promotions and professional development opportunities. Additionally, improving data collection and reporting was highlighted to strengthen funding applications and demonstrate program effectiveness.

To support these efforts, proposed strategies included increasing social media outreach, strengthening collaborations with schools and community agencies, and enhancing internal support systems for employees.

APPENDIX 6.
SPIRITT's PROGRAM DECISION CRITERIA

SPIRITT's Decision Criteria Rubric (Template)		Low	Medium	High
Aligned with Intended Impact	Who/Where: Focuses on target constituents/clients			
	Who: Achieves target outcomes			
	What: Aligns with core activities, approaches, values, beliefs			
Aligned with Theory of Change	How:			
Financially Sustainable	Net financial contribution is positive			
	Funding is renewable and sustainable			
	Cost per outcome is reasonable			
	Utilization rate is expected to be high			
	Other?			
Operationally Viable	Aligns without strategic goals			
	Feasible with current staff skills/capacity or can be built			
	Feasible with current infrastructure/facilities or can be built			
	Relationships with partner organizations are strong			
	Policy environment is supportive			
	Achievable path to a scale that will have meaningful impact			
	Other?			
Organization Benefits and Risks	Does not duplicate strong programs from other organizations			
	Provides a unique leadership role for organization			
	Organizational risks are low (reputation, relationships, legal)			
	Gives access to other high-impact opportunities			
	Other?			