



ORGANIZATIONAL LEADERSHIP & READINESS PROFILE

Prepared for public-sector and philanthropic review

OCHCA • HUD • CALAIM • FOUNDATIONS

Governance, strategy, compliance, stewardship, data responsibility, partnership, and measurable community impact.

RECOVER. REBUILD. THRIVE.

ORGANIZATIONAL PROFILE

A Focused Community Partner

A concise statement of purpose, service approach, and value to Orange County systems.

2 Steps Away, Inc. supports individuals navigating homelessness, substance use disorders, mental health challenges, and justice-involved barriers. The organization is developing a coordinated Community Resource Navigation model that connects people to housing, behavioral health, employment, benefits, transportation, reentry, identification, disability-benefit, and Medi-Cal resources.

The model is designed to complement—not duplicate—county, health-plan, Continuum of Care, treatment, and community-provider functions. 2 Steps Away emphasizes welcoming engagement, client-led planning, verified referrals, warm handoffs, follow-up, and documentation of barriers and outcomes.

- Primary value: trusted engagement with people facing overlapping barriers.
- System value: organized navigation, documented connections, and partner feedback.
- Reviewer value: clear governance, realistic growth, and an evidence-oriented operating framework.
- Public promise: compassionate service, accurate information, and accountable follow-through.

IMPORTANT

This profile distinguishes adopted governance commitments from planning targets. Targets should be confirmed before incorporation into a binding application or contract.

BOARD LEADERSHIP

Welcome from the Board Chair

Governance is the foundation on which credible service and sustainable partnerships are built.

On behalf of the Board of Directors, I welcome you to 2 Steps Away, Inc. Our board understands that community trust must be earned through ethical decisions, responsible stewardship, transparent reporting, and respect for the people whose lives are affected by our work.

We are building governance systems that protect charitable purpose while supporting thoughtful growth. Our priorities include financial discipline, strong internal controls, program quality, client dignity, data responsibility, meaningful lived-experience leadership, and productive collaboration across Orange County.

We invite public agencies, health plans, foundations, and community organizations to evaluate not only what we intend to do, but how we govern, measure, learn, and improve.

- Maintain active fiduciary oversight.
- Review mission, money, risk, compliance, and outcomes.
- Disclose conflicts and document recusal.
- Strengthen independent and lived-experience representation.

SIGNED

Charles T. Harris, BS | CADC-III — Board Chair / President

EXECUTIVE LEADERSHIP

Message from the Executive Director

Turning compassion into coordinated, measurable, and responsible action.

People experiencing homelessness, behavioral health challenges, or reentry barriers rarely face one isolated problem. A housing need may be connected to identification, transportation, health coverage, trauma, recovery support, employment, or a complicated benefits process. Fragmented systems can make every next step harder.

2 Steps Away, Inc. is developing a navigation approach that meets people with respect, clarifies priorities, connects them to verified resources, and follows up on what happened after the referral. We will grow at the pace of our supervision, compliance, partnerships, and financial capacity.

Our aim is to become a reliable bridge: close enough to community to build trust and disciplined enough to meet the expectations of OCHCA, HUD-funded systems, CalAIM partners, foundations, and responsible donors.

- Lead with dignity and informed choice.
- Use accurate referral information and documented workflows.
- Measure completed connections—not only referrals issued.
- Escalate risks and learn from barriers.

SIGNED

Charles T. Harris, BS | CADC-III — Executive Director

COMMUNITY NEED

Homelessness & Behavioral Health

Current official indicators show meaningful progress alongside continued need for coordinated access and support.

6,321

PEOPLE COUNTED

Orange County 2026 PIT Count

3,065

UNSHELTERED

2026 PIT Count

13.7%

OVERALL DECREASE

2024 to 2026 PIT

14.6%

ADULT DISTRESS

Likely serious psychological distress

15.6

DEATHS PER 100K

Drug-induced death rate

15.0%

11TH GRADERS

Alcohol or drug use in prior year

The 2026 count found 3,256 people in emergency shelter or transitional housing and 3,065 unsheltered. Compared with 2024, unsheltered homelessness declined 27 percent. Orange County's 2024-2026 Community Health Improvement Plan identifies mental health and substance use as priority issues and reports persistent distress, youth substance use, and drug-related mortality.

OFFICIAL SOURCES

County of Orange, 2026 PIT results: <https://www.ocgov.com/press/county-orange-announces-2026-point-time-count-results>

OC Community Health Improvement Plan 2024-2026: <https://ochealthinfo.com/page/oc-community-health-improvement-plan-2024-2026>

STRATEGIC DIRECTION

Three-Year Strategic Plan Summary

2026-2028 priorities for a disciplined transition from organizational readiness to measurable community value.

Year One — Build the Foundation: finalize policies, program workflows, board calendar, partner pipeline, privacy and consent practices, financial controls, referral directory, outcome definitions, and staff/volunteer training.

Year Two — Demonstrate Performance: operate a controlled navigation model, measure verified connections and barriers, deepen formal partnerships, improve data quality, pursue diversified funding, and use client feedback to refine services.

Year Three — Scale Responsibly: expand only where evidence, contracts, supervision, funding, and partner capacity support growth. Publish an annual impact brief and maintain an external-ready compliance file.

- Priority 1: Governance and organizational capacity.
- Priority 2: Community Resource Navigation quality.
- Priority 3: Data, outcomes, and continuous improvement.
- Priority 4: Sustainable finance and diversified revenue.
- Priority 5: Trusted partnerships and public accountability.

STRATEGIC DISCIPLINE

No new service line should launch without a defined model, accountable owner, budget, compliance review, partner pathway, and measurable outcome.

DEIB

Diversity, Equity, Inclusion & Belonging

The organization's policies, services, and leadership practices should reduce barriers rather than reproduce them.

2 Steps Away, Inc. affirms the dignity, worth, and self-determination of every person. We seek equitable access regardless of race, ethnicity, national origin, language, religion, sex, sexual orientation, gender identity, age, disability, housing status, justice involvement, veteran status, or other protected or marginalized experience.

Belonging means more than access. People should experience respect, voice, safety, and meaningful influence. The organization will review eligibility rules, communications, referral practices, board recruitment, data, complaints, and outcomes for inequitable effects.

- Use accessible, person-first language.
- Address language and disability access.
- Recruit leadership reflecting community expertise and lived experience.
- Disaggregate outcomes where appropriate and privacy-protective.
- Respond to bias, exclusion, and retaliation.

ACCOUNTABILITY

DEIB progress should appear in board review, workforce development, partner expectations, client feedback, and corrective action.

LIVED EXPERIENCE

Leadership Informed by Lived Experience

Experience with recovery, homelessness, reentry, or system navigation is expertise—not a symbolic credential.

2 Steps Away, Inc. recognizes that people closest to a problem often understand barriers, trust, language, and workable solutions that formal systems miss. Lived-experience leaders should participate in program design, governance, evaluation, outreach, and partnership decisions.

Participation must be voluntary, trauma-informed, and appropriately supported. No person should be pressured to disclose private history, repeatedly retell trauma, or represent an entire community. When feasible, advisory expertise should be compensated.

- Reserve meaningful governance and advisory opportunities.
- Protect privacy and choice about disclosure.
- Provide orientation, mentorship, and decision-ready information.
- Report back on how input changed policy or practice.
- Avoid tokenism by sharing real authority.

LEADERSHIP STANDARD

Lived experience should shape priorities, measures, client protections, and definitions of success.

RISK & COMPLIANCE

Risk Management and Compliance Framework

A practical cycle for identifying, controlling, monitoring, and escalating organizational risk.

The board maintains oversight of major risks while management owns day-to-day controls. A central risk register should identify the risk, category, likelihood, impact, controls, owner, review date, current status, and escalation threshold.

Material incidents should be reported through defined channels. Immediate safety, evidence preservation, insurance notice, contractual notice, legal advice, and corrective action should be addressed as applicable.

- Governance: conflicts, authority, board independence, records.
- Program: client safety, boundaries, referral quality, supervision.
- Finance: cash, fraud, restrictions, procurement, sustainability.
- Compliance: filings, grants, contracts, licensing, reporting.
- Data: privacy, access, cybersecurity, retention, breach response.
- Reputation and continuity: communications, facilities, succession, emergencies.

BOARD CADENCE

Review top risks quarterly, immediately escalate severe incidents, and track corrective action to verified closure.

GRANT COMPLIANCE

Grant and Contract Compliance Overview

Every award should move through a controlled lifecycle from opportunity review to closeout.

Before application, leadership should confirm mission fit, eligibility, capacity, match requirements, allowable costs, data obligations, insurance, procurement, cash-flow timing, and reporting burden. No application should commit the organization to services it is not prepared to deliver.

After award, program and finance staff should maintain a shared award summary, approved budget, deliverables calendar, cost documentation, performance evidence, amendment log, and closeout checklist.

- Pre-award risk and capacity review.
- Authorized application and signature.
- Award kickoff with program, finance, data, and leadership.
- Monthly budget-to-actual and deliverable review.
- Timely narrative and financial reporting.
- Documented approval of changes and subcontractors.
- Retention, audit readiness, and closeout.

ESCALATION

Questioned costs, missed deliverables, data incidents, material underspending, repayment risk, or adverse findings should reach the board promptly.

FINANCIAL STEWARDSHIP

Principles for Responsible Financial Management

Charitable resources should be authorized, traceable, mission-aligned, and protected.

The board approves the budget, delegation thresholds, major commitments, financial policies, and corrective actions. Management provides timely statements, forecasts, restricted-fund reports, and explanations of material variance.

Small organizations may use compensating controls when full separation of duties is not possible. Examples include independent review of bank statements, dual authorization, board review of executive expenses, and restricted system access.

- Accuracy: complete, timely, reconcilable records.
- Authorization: written limits and documented approvals.
- Restriction: honor donor, grant, and contract terms.
- Transparency: understandable reporting to the board and funders.
- Sustainability: cash forecasting, reserves, and revenue diversification.
- Integrity: conflict disclosure, vendor verification, and fraud response.

CORE DASHBOARD

Cash on hand, forecast, actual-to-budget, restricted balances, receivables, payables, award status, and material financial risk.

DATA RESPONSIBILITY

Privacy, Security and HIPAA Commitment

Trust depends on collecting only what is needed and protecting it throughout its lifecycle.

2 Steps Away, Inc. is committed to confidentiality, informed consent, minimum-necessary collection and disclosure, role-based access, secure storage and transmission, retention controls, incident response, and workforce training.

HIPAA applies based on legal status and specific activities; handling health-related information does not automatically make every nonprofit a HIPAA covered entity. The organization will determine its status with qualified counsel, comply with applicable federal and California requirements, and honor stricter contractual or HMIS obligations.

- Plain-language privacy notices and consent.
- Identity and authority verification before disclosure.
- Access granted by role and promptly removed.
- Secure devices, passwords, transmission, and storage.
- Documented incident assessment, mitigation, and notice.
- Vendor and partner privacy terms.
- Regular training and access review.

COMMITMENT

Never claim blanket HIPAA compliance without confirming applicability, required safeguards, business-associate duties, and actual operational evidence.

PARTNERSHIPS

Community Partnership Strategy

Partnerships should improve access, close referral loops, and make the service system easier to navigate.

The organization will prioritize relationships with OCHCA and behavioral health providers, Orange County Continuum of Care and homeless-service agencies, CalAIM managed care and community-support partners, reentry organizations, benefits and legal-navigation providers, workforce agencies, cities, faith and community organizations, and foundations.

Each formal partnership should define purpose, populations, referral pathways, responsible contacts, response expectations, data boundaries, costs, performance measures, complaint routes, insurance, term, and termination.

- Map service gaps and high-value referral pathways.
- Verify partner capacity and eligibility rules.
- Use warm handoffs for higher-risk needs.
- Track connection, delay, denial, and referral failure.
- Meet quarterly with priority partners to resolve barriers.
- Share de-identified learning and avoid duplicative services.

PARTNERSHIP TEST

A signed agreement is not the outcome; a more reliable pathway for people is the outcome.

ANNUAL GOALS

Planning Dashboard

Illustrative FY2026 targets for board confirmation before external use; these are targets, not reported achievements.

MEASURE	TARGET	REVIEW
People engaged	300	Monthly
Needs assessments completed	250	Monthly
Verified service connections	60% of referrals	Quarterly
Follow-up within 7 days	85%	Monthly
Client consent completeness	95%	Monthly
Priority partner agreements	12	Quarterly
Board policy/calendar completion	100%	Quarterly
On-time grant/contract reports	100%	Quarterly
Privacy/security training	100% of authorized users	Annual
Client experience	80% positive	Semiannual

For each measure: define numerator, denominator, data source, owner, validation rule, equity lens, and corrective-action threshold.

BOARD DEVELOPMENT

Board Recruitment Matrix

Recruitment should close governance gaps while strengthening independence, community credibility, and lived-experience voice.

The board should assess current and desired representation annually. Recruitment criteria should be tied to strategy and risk rather than personal familiarity alone. Staff expertise is valuable, but independent directors are essential for objective oversight—especially where executive performance, compensation, conflicts, finances, or complaints are concerned.

- Finance/accounting and audit — strengthen independent financial review.
- California nonprofit law/compliance — advise governance and contracting oversight.
- Homeless systems/HUD/CoC — deepen system alignment and funding literacy.
- CalAIM/managed care — add healthcare contracting and quality expertise.
- Data/privacy/cybersecurity — strengthen HMIS and information governance.
- Fundraising/philanthropy — diversify revenue and foundation relationships.
- Lived experience — center recovery, homelessness, and reentry knowledge.
- Community/geographic representation — reflect Orange County populations served.

RECRUITMENT PRIORITIES

Independent finance, legal/compliance, and Orange County homeless-systems expertise should be high-priority additions.

CONTINUITY

Succession Planning Framework

Leadership continuity protects service, records, relationships, and public confidence.

The board should maintain emergency and planned succession pathways for the Board Chair, Executive Director, Chief Financial Officer, program leadership, clinical leadership, data/HMIS responsibilities, and key grant administration.

Emergency succession addresses immediate authority, safety, communication, banking, payroll, systems access, contracts, and partner continuity. Planned succession includes leadership development, documentation, recruitment criteria, knowledge transfer, stakeholder communication, and board oversight.

- Name interim authority and decision limits.
- Maintain current role descriptions and essential-process guides.
- Protect credentials, records, contacts, and filing calendars.
- Cross-train critical functions and review access annually.
- Define communications for staff, clients, partners, funders, and regulators.
- Evaluate whether dual board/staff roles create continuity or independence risk.

ANNUAL REVIEW

Test the plan through a tabletop exercise and document gaps, owners, and completion dates.

REVIEWER ALIGNMENT

Why This Framework Matters

The same organizational disciplines support public contracts, healthcare partnerships, HUD-aligned collaboration, and foundation confidence.

For OCHCA and CalAIM partners, the framework emphasizes client dignity, defined workflows, privacy, measurable connections, qualified supervision, risk escalation, and responsible partnership. For HUD and CoC-aligned work, it emphasizes coordinated access, referral closure, HMIS readiness, housing-system collaboration, and reliable documentation. For foundations, it demonstrates governance, strategy, equity, financial stewardship, learning, and scalable discipline.

Readiness does not mean claiming every credential or capacity today. It means maintaining a transparent plan, building controls before expansion, documenting evidence, and knowing when external expertise or formal approval is required.

- Governance evidence: minutes, policies, disclosures, board calendar.
- Program evidence: model, eligibility, workflow, outcomes, feedback.
- Financial evidence: budget, statements, controls, restricted funds.
- Compliance evidence: award files, reporting calendar, corrective action.
- Partnership evidence: agreements, referral pathways, performance review.

REVIEWER INVITATION

Evaluate 2 Steps Away, Inc. as a developing organization committed to honest capacity-building and accountable partnership.

DOCUMENTATION

Sources, Review & Next Action

Finalize organizational targets and obtain appropriate legal, accounting, privacy, and contracting review before submission.

SELECTED SOURCES

- County of Orange, 2026 Point In Time Count Results: <https://www.ocgov.com/press/county-orange-announces-2026-point-time-count-results>
- OC Community Health Improvement Plan 2024-2026: <https://ochealthinfo.com/page/oc-community-health-improvement-plan-2024-2026>
- OC Health Care Agency Behavioral Health Services: <https://www.ochealthinfo.com/services-programs/mental-health-crisis-recovery/mental-health>
- Orange County Office of Care Coordination: <https://ceo.ocgov.com/office-care-coordination>
- U.S. Department of Housing and Urban Development: <https://www.hud.gov/>
- U.S. HHS HIPAA guidance: <https://www.hhs.gov/hipaa/>
- California DHCS CalAIM: <https://www.dhcs.ca.gov/CalAIM/>
- 2 Steps Away, Inc.: <https://www.2stepsaway.org/>

FINALIZATION CHECK

- Board confirm strategic targets and dashboard benchmarks.
- Counsel review bylaws, dual roles, contracts, privacy, and regulatory statements.
- Accountant review financial controls and grant-cost practices.
- Program leadership confirm service claims, supervision, and data workflow.
- Board authorize external publication and retain the approval record.

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