



HOMELESS WORKFORCE SECTOR DATA

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AGENDA

- **Analysis Overview**
- **Data Findings**
- **Sector Challenges**
- **What's Next?**



ANALYSIS BACKGROUND

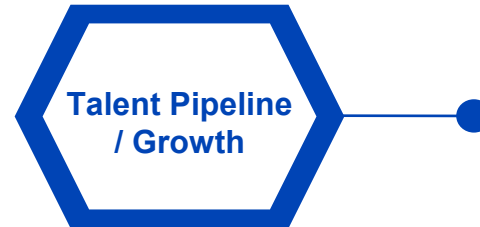
In 2022 and 2024, KPMG, in partnership with the Home For Good (HFG) team at United Way of Greater Los Angeles (UWGLA), conducted two detailed analysis of the homeless service sector workforce in Los Angeles County with four key objectives in mind.



- Understand the scale, demographics, and composition of the homeless services workforce by analyzing internal and external workforce data
- Collect key workforce data insights from a representative sample of organizations within the sector to glean insights related to attraction, retention, and development of the workforce



- Understand what entices and motivates candidates to work in the sector
- Analyze the external perception of the sector to identify opportunities to improve the homeless services sector brand
- Gain insight into how to strategically receive funding for workforce development programs



- Identify untapped talent pools to target recruiting efforts
- Determine new ways to draw in new employee types based on their desired Employee Value Proposition
- Analyze what is working well and the pain points of the recruiting experience and why employees stay in the sector



- Gather common employee sentiments to determine additional support needed
- Identify current training available to employees in the sector
- Create personas to understand the unique wants and needs of select employee profiles



ANALYSIS METHODOLOGY

The data collected in these studies is **representative of 52 unique organizations in 2022, 40 unique organizations in 2024 and over 4,500 homeless sector employees.**



Agency Workforce Data

- Leveraged a **sample size** of LA County agencies that **represented 50-60%** of the sector workforce
- Obtained workforce talent data from identified organizations to **understand hiring, retention, and turnover trends** to document the current state



KPMG's Signals Repository

- Utilized KPMG's Signals Repository to **analyze industry trends** based on external labor market data
- The data from industry trends drove **benchmark sector insights** (e.g., compare LA County homeless services sector to Houston)



Sector Employee Survey

- **Gathered diverse worker sentiments** on culture, employee experience, employer brand, employee value proposition, etc.
- Delivered **anonymous survey to ~200 sector employees** utilizing employees from the agency sample size



1:1 Sector Leader Interviews

- Conducted deep dive sessions to **understand leadership perspectives** regarding the common needs of the sector
- Connected with 12 different leaders from **agencies, colleges, and foundations**



Employee Focus Groups

- Gathered insight on how **cultural norms differ by demographic groups** (e.g., Case Manager, Housing Navigator, BIPOC Leader) in the focus groups
- Probed on results from quantitative data to **obtain qualitative perspectives** in focus groups






DATA FINDINGS








KEY ASSUMPTIONS OF THE STUDY

We utilized key assumptions identified below across workforce and demographics data to pull in insights to inform the current state assessment.

Workforce

-  **LA Homelessness Sector:** Los Angeles Continuum of Care homeless services system includes over ~8,000 positions
-  **Provider of Homelessness Services:** assists unhoused clients in accessing housing services (e.g., application of benefits, connecting to funding for housing process, supplemental security income, Medicaid, My Health LA). Healthcare is not a provider.
-  **Affiliate of Homelessness Services:** orgs that focus on sanitation, public safety, public health, health care delivery (i.e., hospitals, community clinics), or other non-homeless health and human services (e.g., Department of Public Social Services, LA Unified School District)
-  **Role: Client-facing vs. Administrative:**
 - Client-facing: Case managers, matchers, housing coordinators, program managers, janitors, site security, etc.
 - Administrative: Finance, HR, IT, etc.

Demographics

-  **Organization Size:**
 - Large orgs: >100 employees
 - Small orgs: <= 100 employees and Measure H Funding <= \$5M
-  **Organization type:** Non-profit; Government
-  **Entry-level:** 0-2 years experience
Sector Experience: 2+ years experience
-  **PWLE:** Person with lived experience of homelessness or housing instability
-  **Generation:**
 - Boomer: born 1946-1964
 - Gen X: 1965-1980
 - Millennial: 1981-1996
 - Gen Z: 1997-2012



DEMOGRAPHIC FINDINGS

Ethnicity	2022 Sector Workforce* ¹	2022 Homeless Population ²	2024 Sector Workforce* ³	2024 Homeless Population ⁴
Black, African Ancestry, or African Diaspora	30.03%	30.0%	24%	31%
Asian	5.13%	0.9%	6%	1.6%
Hispanic or Latino/a/x*	41.67%	44.5%	49%	32.4%
Native American or Alaska Native	0.33%	0.9%	.4%	2.2%
Native Hawaiian or Other Pacific Islander	0.52%	0.2%	.33%	0.5%
Two or More Races	3.12%	2.5%	4%	3.2%
White	19.19%	21.0%	18%	29.0%
Middle Eastern nor Northern African			0.1%	0.1%

*Sector Workforce Data was collected from 52 organizations in 2022 and 40 in 2024. It is not an exhaustive list of all homelessness sector agencies.

Sources:

- ¹KPMG, Workforce Analysis, 2022
- ²LAHSA, Greater Los Angeles Homeless Count, 2022
- ³KPMG, Workforce Analysis, 2024
- ⁴LAHSA, Greater Los Angeles Homeless Count, 2024



2024 DEMOGRAPHICS: ORGANIZATION SURVEY DATA

We utilized **key assumptions** identified below across workforce and demographic data to pull insights to inform the **current state assessment**.

Race & Ethnicity	
Asian Employees	6%
Black or African American Employees	24%
Employees of Two or More Races	4%
Hispanic or Latinx/o/a Employees	49%
Indigenous or Native American Employees	0.40%
Middle Eastern or North African Employees	0.10%
Native Hawaiian and/or Pacific Islander Employees	0.33%
White or Caucasian Employees	18%

Education Level	
Associate's Degree	8.84%
Bachelor's Degree	38.88%
Certification / Trade / Technical / Vocational School	6.00%
High School Graduate / GED	25.70%
Master's Degree	19.03%
Ph.D. or Higher	1.50%
Some High School Education	0.05%

Tenure	
< 1 year	26.05%
1 - 2 years	32.01%
3 - 5 years	21.64%
6 - 10 years	12.76%
10+ years	7.53%

Gender	
Woman	62.57%
Man	34.50%
Non-Binary	0.58%
Transgender	2.34%

PWLE*	
Percentage of employees who have experienced homelessness	19%

Disability Status	
Employees without Disabilities	92%
Employees with Disabilities	8%

Generation	
Baby Boomer (born 1946 - 1964)	8%
Generation X (born 1965-1980)	23%
Millennial (born 1981 - 1996)	52%
Generation Z (born 1997 - 2012)	17%

*Based on response from 8 organizations only



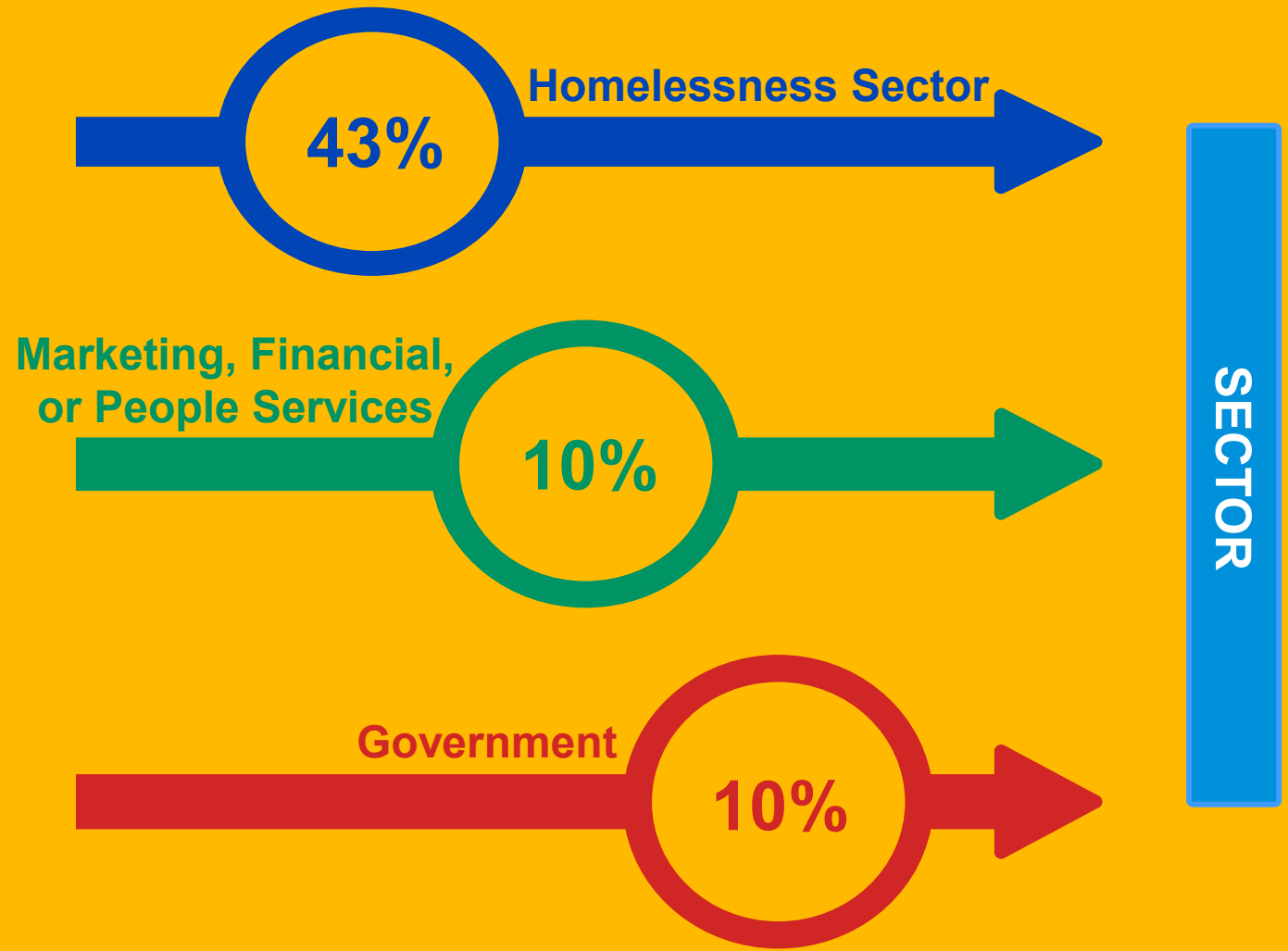
WHERE IS TALENT COMING FROM AND WHO DO YOU NEED?

Average Inflow to the sector from 2008 to 2022:

Majority of talent is coming from the homelessness services sector which can be attributed to “agency hop.”



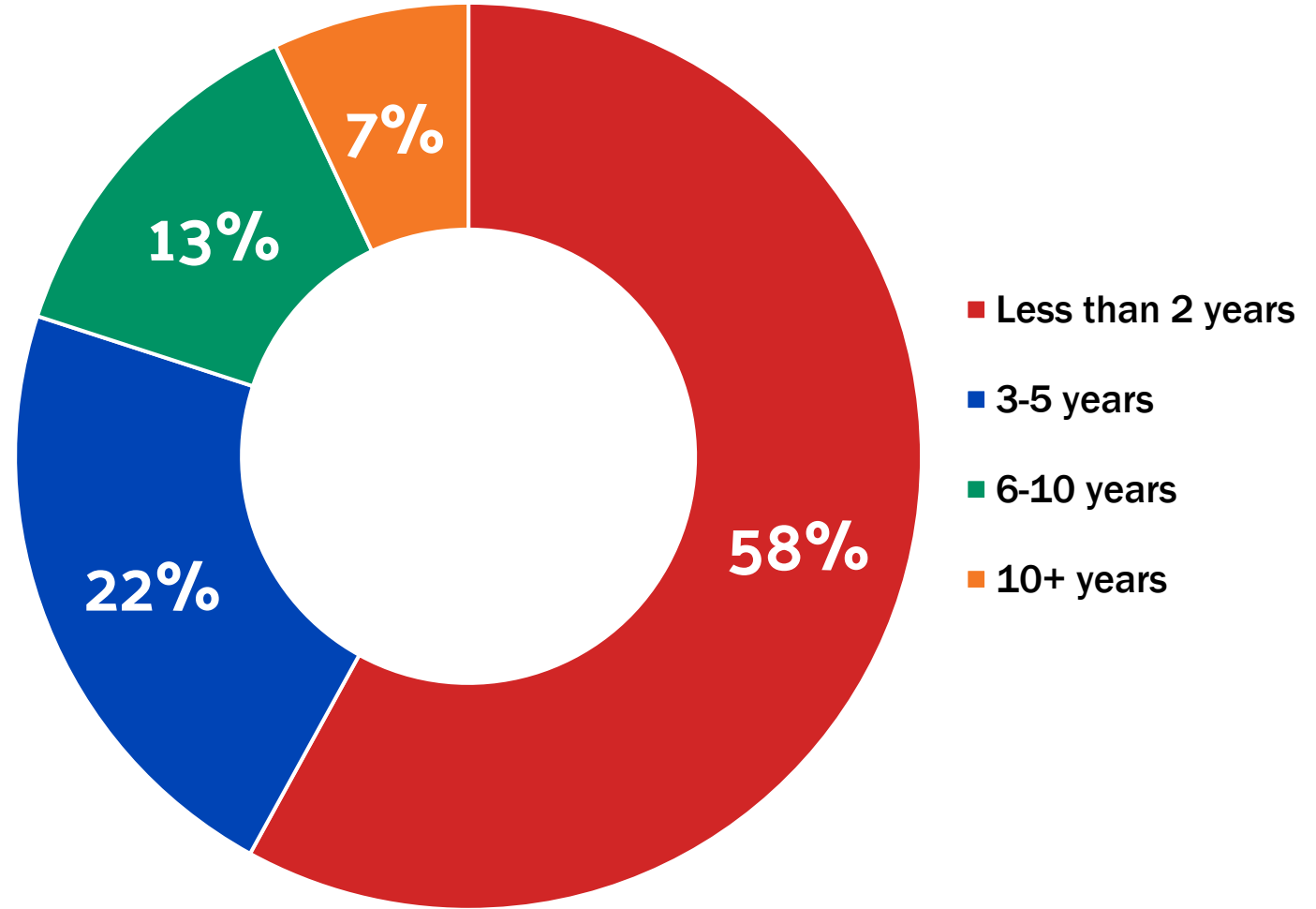
Top Industry Feeders to LA Homelessness Services Sector



2024 TENURE IN SECTOR AGENCIES

58%

of the Homeless
Workforce sector has
been in their roles for
two years or less.



Sources:
KPMG, Workforce Analysis, 2024



TENURE FINDINGS

- Most of our workforce only has a tenure of **2 years or less** and this trend is only increasing.
- The exit time frame for the sector seems to be the **3-5 year mark**
- The increase between 6-10 years in the sector is the only large increase in sector size.
- Since 2022, there was only a 1% increase in individuals who have been in the sector for 10+ years.

Tenure at Organizations	2022 ¹	2024 ²
2 years or less	54%	58%
3-5 years	29%	22%
6-10 years	5%	13%
More than 10 years	6%	7%

Sources:

¹ KPMG, Workforce Analysis, 2022

² KPMG, Workforce Analysis, 2024

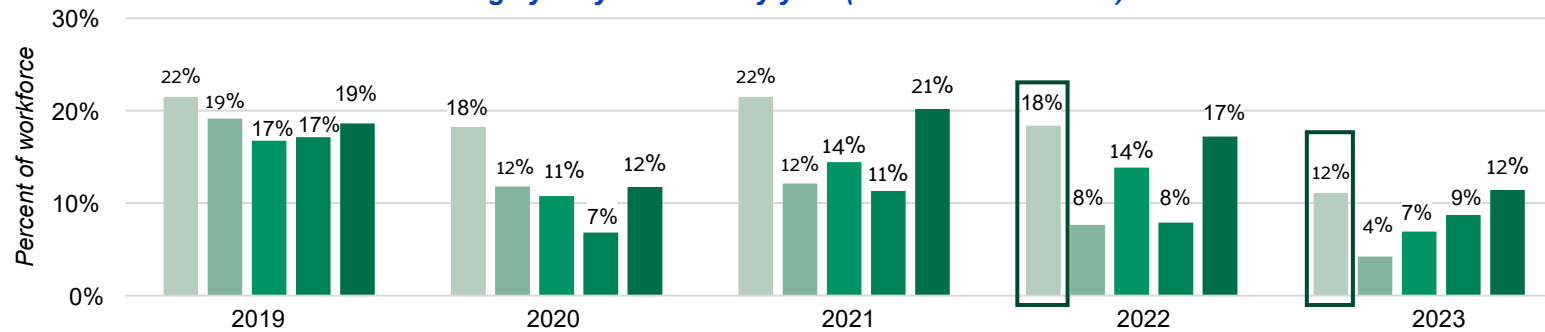


AVERAGE YEARLY TURNOVER ACROSS DIFFERENT CITIES

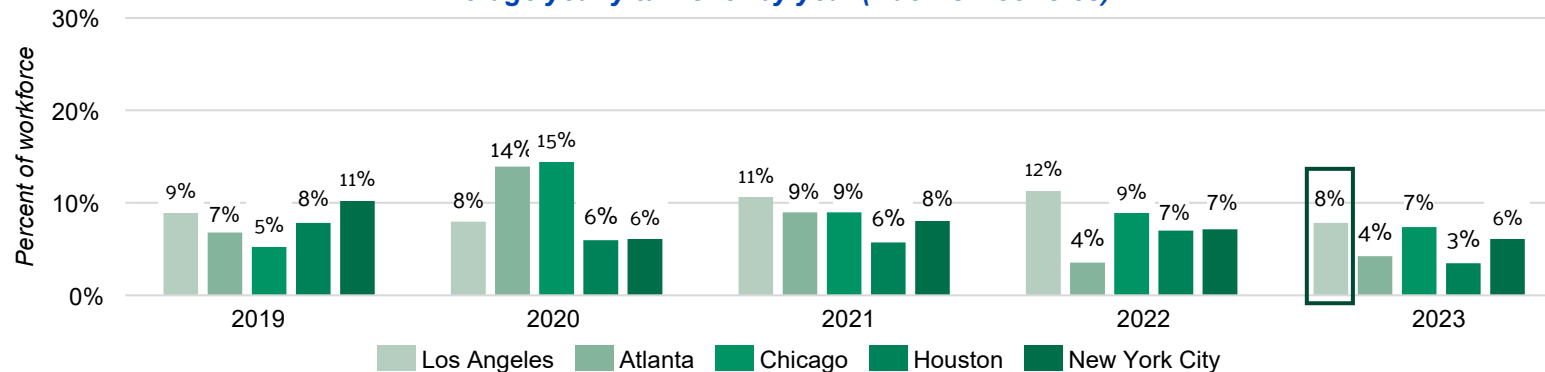
Average yearly turnover trends show that **direct service roles have higher turnover** than back-office roles. In 2023, the average employee turnover rate in the United States was 3.8%².

Rates of Turnover

Average yearly turnover by year (Direct Service roles) ¹



Average yearly turnover by year (Back-Office roles) ¹



Observations

- LA had the **largest drop in turnover** (6%) from 2022 - 2023 for direct service roles, however, LA has had **higher turnover than other cities** since 2019
- As of 2023, **Los Angeles** had **higher** yearly turnover rates for back-office roles compared to other cities
- Between 2019 and 2023, majority of **turnover rates** for direct service roles and back-office roles have been **decreasing** for all cities

Insights

- Create **targeted strategies** to improve working conditions for direct services and back-office employees to enhance retention
- Create **career path options** so employees can develop into other roles (e.g., rotate from a direct service role to a back-office role)
- Collaborate with other cities** to find leading practices on reducing turnover rates

Sources:

¹Advisory Data Organization, KPMG Market Insights

²Forbes, Key HR Statistics And Trends In 2024



CHALLENGES



Summary of our current state findings

Attracting Employees

Recruiting Employees

Onboarding Employees



What are the key strengths today?

- **Partnerships** with **workforce development boards** and **universities** have helped attract candidates for some agencies
- Organization mission, interest in the social sector, and community impact were **top drivers (~50%) for joining the sector**, indicating a need for strong employer branding in these areas

- Indeed, is an **effective recruitment channel** and is leveraged by **30% of organizations**
- Only **57% of organizations have a recruiter(s)**, but those that do report significant improvements in their recruitment processes and efficiencies
- Job fairs have **success in mass hiring** for the sector
- Targeting **city/county employment programs** such as LA RISE and PLACE have increased demographic based hiring (e.g., PWLE)

- **Networking with executive leaders** has boosted morale during the onboarding process
- Many agencies (**48%**) have made several efforts **to deploy an orientation program for new hires**



What are the key challenges today?

- Existing **employee benefits do not meet employee needs today**. Employees desire discounts, food allowances, wellness coupons, etc.
- Recruiter and Gen Z focus groups shared that candidates face **societal stigma** surrounding joining the sector
- Many positions require employees to be fully onsite, however, a **flexible work schedule** that fits specific worker personas would attract more candidates
- Limited organizations have established career paths today; **only 27% source primary talent internally**

- **Limited stakeholder alignment** among HR, hiring managers, and recruiters results in **overlapping roles and responsibilities**
- High rates of time to hire is a key challenge with a **desire to streamline the process** (On average, it takes **44 days to fill positions** across the sector)
- **35%** of the organizations reported case managers and housing navigators as most difficult to fill roles indicating the need to **evaluate the job descriptions, compensation structures, and internal talent pool**
- **53%** of the organizations are **unsure if they effectively utilize the right tools** and technology across the recruitment process

- Investing in onboarding, resources, and training programs was reported as a top challenge. **Only 19% of sector organizations consider onboarding as an organizational priority**
- **Field safety** for direct services employees was cited as a **major concern** by at least 33% of the executive leaders during leadership interviews
- Only **24% of the sector employees** indicate they were provided job specific training
- **37% PWLE** employees claimed that onboarding/training did not set clear expectations for their job



EXISTING SECTOR ONBOARDING TRENDS AND CHALLENGES

Only 58% of employees agree that their onboarding experience clearly set expectations for their job and what it entails. To avoid reinventing the wheel, agencies need to come together, share resources, and **standardize existing sector programs**.

Existing Trends

Across the sector, **Reading Materials** and **On-the-Job Training** were reported as top 2 modes of delivery for onboarding and training programs, however...

Only 25%

Of the organizations reported they provide on the job training and reading materials to train their employees.

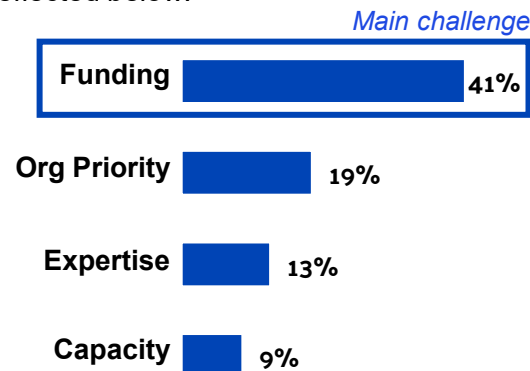
Stakeholders who develop the onboarding trainings include:

HR and Onboarding Team: ~60%

Hiring Managers: 25%

Challenges to Onboarding

Key barriers identified for developing and maintaining a formal and structured onboarding and training program are reflected below:



The Investment Factor

To develop and maintain an onboarding program, annual organization investments are:

Average: \$93,272.02

Median: \$50,000.00

Funding comes from various sources:

1. Private Fundraising
2. Grants
3. Foundations
4. Private sector/donations
5. Government contracts

***Not all onboarding programs receive funding*

Key Benefits

When asked: "Structured onboarding programs have increased the retention rate at our organization":

38% organizations stated they were neutral
53% organizations stated they agreed
9% organizations stated they disagreed

Structured onboarding programs have increased retention rates for:

Case Managers

Program Managers

Operations - HR

Key Takeaways

Though 24% of employees validated they received on the job training, there are opportunities to expand across the sector. **Hiring managers can bridge this gap** by sharing job-related knowledge and designing and facilitating trainings.

Funding is the major barrier towards a cohesive onboarding and training strategy today, **curating the need for more collaboration across all agencies** in the sector.

There is an **opportunity to educate individuals** on the current training challenges for the sector and **advocate for increased funding** towards onboarding and training initiatives.

There needs to be an **increased focus on training for back-office staff** on different agency programs across the sector. Programs need to **focus on job related knowledge** to increase engagement and reduce turnover.

THE COMPENSATION AND BENEFITS CHALLENGE..

Rise in cost of living and low compensation, particularly for direct service employees was reported as one of the top challenges in the LA Homelessness Services Sector today. **83% of employees** who participated in the survey indicated they may **consider leaving the sector due to a better compensation and benefits package at a different organization**¹

Employee expectations

When asked: From your perspective, what is an appropriate salary range to meet the cost of living in LA?



60k-70k

For direct service entry-level roles



80k-100k

For managerial and supervisory level roles



~130k

For senior manager and director level roles



~\$1,000

Bonus for licensed and long-tenured employees

Data source: Employee Focus Groups

External Market Insights



Key Compensation and Benefits Trends:

- Develop a compensation philosophy
- Classify jobs to standardize pay for similar roles
- One-time incentives to offset cost: Sign-on, retention bonuses and performance-based incentives²
- Incorporate leadership recognition awards



For individuals to live comfortably to meet **the average cost of living in Los Angeles**, the minimum pay should be closer to **\$76,710 yearly after taxes** to cover rent, food, and transportation costs³



Leading practice suggests a **Program Manager** should be paid an average salary of \$80,000-\$110,000 in LA⁴



Average earnings of most frontline staff are less than \$30,000 per year; in general, **frontline workers are reported to earn about \$10,000 less per year** in California⁵



Sources:

¹Rand, Living Wages in Los Angeles County's Homeless Response Sector, 2023

²The Non-Profits Times, Nonprofit Staff Are Getting Performance Incentives

³Housing Anywhere, What's the average salary in Los Angeles, 2024

⁴2023 Nonprofit Hiring Trends and Salary Guide, Careers in Non-profits

⁵SDHC, Compensation Benchmarking Report, 2023

THE CULTURE HOMELESS SECTOR EMPLOYEES VALUE

"Only 25% of job success is based upon IQ. 75% is about how your brain believes your behavior matters, **connects to other people**, and manages stress." - Shawn Achor, author of *The Happiness Advantage**

When asked: What are some practices or policies that you would like to see changed and or implemented to improve the experience of employees within the LA homeless services sector?

I think [representation] is definitely improving but like always I think more could be done. Smaller teams/ individual offices do much better but **upper management still seems disconnected at times despite consistent feedback.**

Providing support and training to lived experienced employees can boost the morale for our population in the work environment, leading to high satisfaction and productivity.

Practices: making work more community-based, **people not being siloed into their specific roles and being encouraged/engaged to share resources and experiences.**

I need support like being on site, suggesting solutions efficiently and fast enough when an issue arises. **Sometimes I feel on my own when I don't even know what I'm doing.**

Administration is all about numbers and documentation. Which I understand is important but safety and care is more important. I **have dealt with many mental health crisis and administration asks "did you document this," meanwhile not supporting me with how this affects me.**

I think **my supervisor is required to meet one on one** with me an hour a week. But that **doesn't feel like enough.**

I feel that we all have the same goal but it is **split up to feel like we are combatting one another.**



Less red tape to support people. More connections and community building within the sector.



WHAT'S NEXT?



WHAT'S NEXT? TURNING INSIGHTS INTO ACTION

United Way of Greater Los Angeles seeks to fully understand and help address the anticipated funding challenges facing the homeless services sector by assessing potential impacts and developing strategic solutions to minimize workforce disruption in greater Los Angeles. The tailored activities below will enable strategic workforce insights and deliver forecasting capabilities that will empower United Way Of Greater Los Angeles and partner agencies to proactively navigate funding reductions.

	Activities	Purpose & Outcomes	Analysis Goals
Analysis	Identification & Analysis of Relevant Comparisons	Utilize KPMG's Advisory Data Organization (ADO) and benchmark sector insights to make informed decisions on workforce comparisons based on public data. <i>Method: Industry Benchmarking & Advisory Data Organization (ADO) Data</i>	Understanding of the current workforce landscape to determine if staffing levels align with optimal operational efficiency and help inform how financial constraints could reshape workforce dynamics. Create solutions essential to maintaining service continuity, with strategies focused on minimizing workforce impact and fostering potential new pathways for displaced workers to remain active in the sector.
	LA Sector Workforce Current State Analysis	Assess the current workforce size across agencies, identify critical roles for service delivery, and pinpoint staffing shortages impacting critical services. <i>Method: Workforce surveys, stakeholder interviews, and focus groups</i>	
	Scenario Planning / Risk Profiling	Evaluate the impact of potential funding cuts on workforce size, identify vulnerable critical services, and develop staffing models. Determine the minimum viable staffing level, the risk of critical roles being impacted, and develop prioritization strategies. <i>Method: Quantitative workforce data samples</i>	
Insights	Workforce Strategy Recommendations	Identify strategies for workforce sustainability, typical staffing ratios in high-performing regions, and resilient funding models in similar sectors.	
	Change Management Strategy for Workforce Sustainability Opportunities	Offer a detailed framework/approach and recommendations for navigating transitions and addressing funding challenges, enabling impacted organizations to maintain service continuity while adapting to new funding realities.	





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