



**Helping Hand  
Strategic Growth Plan  
2019 - 2022**

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# Executive Summary

Building on over 65 years of commitment in providing quality services to persons with disabilities to help them achieve their highest level of education, independence, and ongoing quality of life, Helping Hand (“HH”) presents this Strategic Growth Plan that it believes will elevate the organization’s leadership position and significantly increase its impact in this sector.

HH embarked on the Strategic Growth planning process from August 2017 to February 2018, engaging a wide range of its stakeholders in thought and conversation about the strategic pillars that will help guide its leadership through Fiscal Years 2019 and 2022. The Helping Hand Board (“Board”) and the HH Leadership Team, along with the Helping Hand Foundation Board (“HHF”), reflected on the organization’s history, strengths, and areas for improvements, while developing an understanding of the emerging trends and stakeholders’ viewpoints. Coming out of the process, the Board and HH Leadership Team decided to update the name, tagline, HH’s current mission, and vision statement, as well as identified six key strategic “protect and grow” areas on which Helping Hand will focus in the next years.

## **Name Changed:**

The word “Center” was removed from the name to reflect the growing reach of the services that Helping Hand provides.

## **HH’s Mission Changed:**

*“Transforming lives of all connected to Helping Hand through genuine care and education”.*

## **HH’s Vision Changed:**

*“For people with intellectual/developmental disabilities to be equally valued in all communities”.*

## **HH’s Strategic “Protect and Grow” Areas for Fiscal Years 2019-2022:**

Helping Hand's strategies were prioritized to build on its strength, maximize its impact in a relatively brief period of time, become financially sustainable, enhance and differentiate its brand, and complement its other programs and services.

Its strategy focuses on the building blocks to maintain a great organization through the best employees providing genuine care and education. Helping Hand will continue to listen and respond to the needs of its employees so they can have the tools and support to provide the best service to the students/clients of Helping Hand. Working as a team and less in silos the financial stability will continue to improve and give Helping Hand a safety net if something unexpected occurs. Once the structural pieces are in place Helping Hand will simultaneously develop needed services for the aging population and individuals that can live more independently. Finally, this will place Helping Hand into a position to rebrand and market to the community and let more people know about the prominent level of quality services that are offered and begin to "make a movement" to entwine the community in Helping Hand's mission and vision.

- **Become the "Best Place to Work" in the I/DD service sector by leading with heart:**
  - attract and retain top talent to continue delivering high-quality services
  - reduce the impact on clients/families during staff turnover
  - maintain DSP (frontline) wages at 125% of the median pay
  - create a more robust and competitive compensation package (including bonus structure)
  - create and implement a clear plan for career advancement at all staff levels. Including education reimbursement
  - ensure and improve how "staff's voices are heard"
  - create innovative health & wellness programs for employees
  - win/be runner-up for a major award from a credible agency as the Best Place to Work
- **Build financial/operational strength to attain growth in a fiscally sound manner while continuing to fund/expand current services:**

- maintain a positive net income margin for the next three fiscal years
- double operational fundraising
- increase endowment to \$2.5 million
- set “give/get” expectations and require board members 100% participation in yearly donations
- design a program to make families aware of the funding gaps and how they can help
- Increase legacy gifts
- Increase cash reserves to a minimum of 3 months of expense
- upgrade CRM software for donors
- **Strengthen brand recognition and communications:**
  - create updated vision and mission statements
  - expand and align Brand with agency vision
  - educate and communicate with client families and employees
  - on an ongoing basis continue to gather stakeholder feedback
  - improve communications packages (website, newsletter, stakeholder meetings, etc.)
- **Strengthen and develop the Board and the Foundation Board:**
  - create a unified vision and complementary missions between all boards
  - create an associate board of next-generation board members
  - build a more diverse Board (DEI)
  - strive for best practices in governance
  - develop governing principles
  - clearly define board member roles, expectations, and obligations
- **Become a leader in innovative programming that incorporates technology:**
  - expand and upgrade IT infrastructure of Helping Hand to position it to utilize innovative technology in programs (get to the cloud and upgrade to O365)
  - complete a feasibility study/budget on a “tech” home that can be used for people that want to learn to be more independent

- o expand technology in the school, clinic, and adult programs (better software, smart boards, etc.)
- **Expand needed programs and services**
  - o double Adult Ageing Program size
  - o develop a health & wellness plan for all clients
  - o a complete study of operating residential homes for our aging population, upgrade if needed
  - o complete feasibility study/budget for at least one social enterprise business venture that people with I/DD are employed
  - o complete feasibility study/budget for remote/virtual day program/employment sites
  - o complete a feasibility study for adding other I/DD diagnoses to HH's School

While HH recognizes that some of the Protect and Growth Areas are closely related and interdependent, it believes that each area deserves an intentional focus and energy for HH to continue to expand and deepen its impact with a sustainable operating model. The HH Board and staff are committed to overseeing and executing these Protect and Growth Areas in the next three fiscal years so that Helping Hand is positioned to be a leader and innovator in the disability sector for many years to come.

## **1. History and Background**

For more than 65 years, Helping Hand (“HH”) has committed to providing quality services to persons with disabilities to help them achieve their highest level of independence. Today, HH provides services to all ages of individuals - from the very youngest in its Outpatient Clinic and School to adults and the elderly in its day programs, employment services, and residential programs.

As the demographics, as well as clients’ needs, have shifted, coupled with changes in funding and organizational leadership, HH saw an opportunity to re-evaluate the landscape and its programs, and to seek broad inputs from its key internal and external stakeholders, to help the organization in its strategic growth for the next three years. These insights brought greater clarity on what makes Helping Hand a special place and focused the Board and staff on what matters most in the future. With this understanding, HH developed clear protection and growth areas for Fiscal Years 2019 and 2022 with accompanying action plans that are aligned with the current mission and vision.

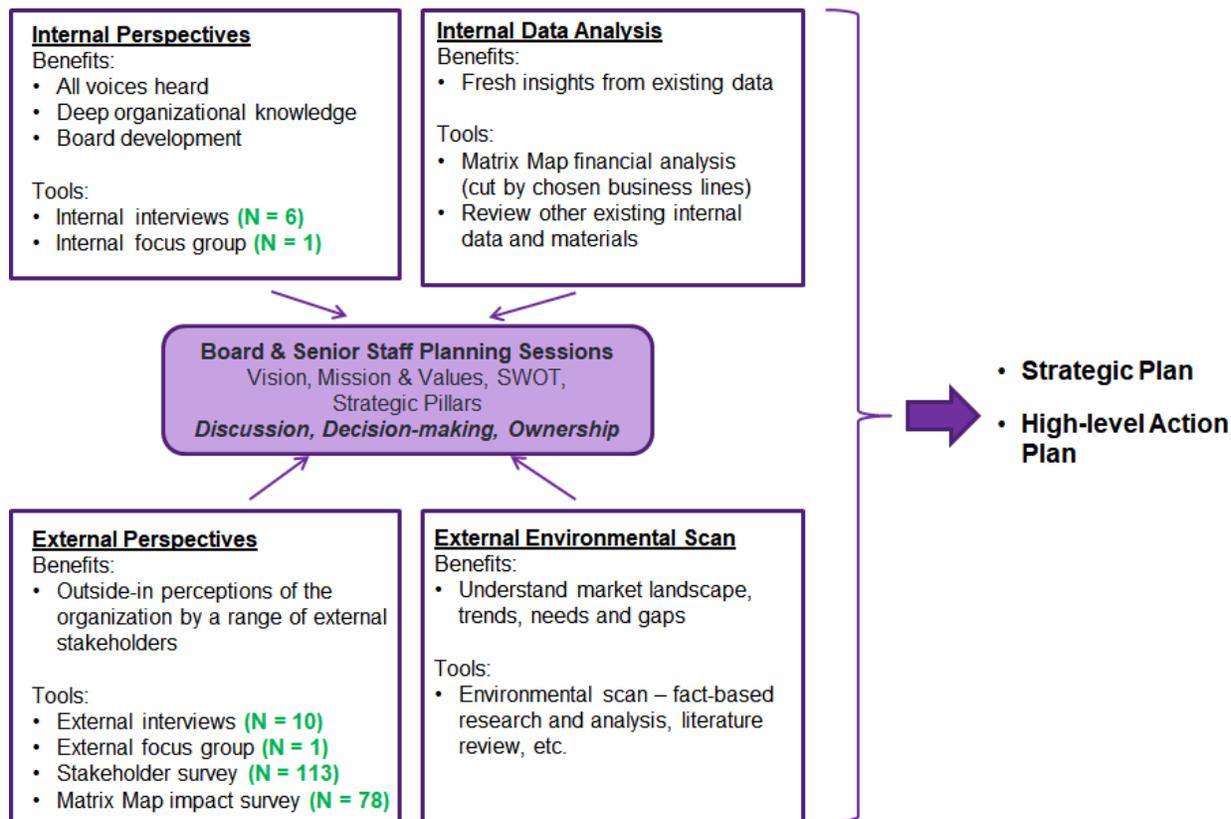
## **2. Overview of Strategic Planning Process**

HH retained a consulting firm, Bold Agenda, to help guide its Strategic Growth Plan development process. The Bold Agenda team conducted comprehensive internal and external assessments, using a variety of instruments such as:

- In-depth 1-on-1 interviews with six internal and ten external stakeholders
- An in-person focus group with staff members
- Another in-person focus group with clients’ parents
- An impact survey for the Matrix Map analysis sent to both internal and external stakeholders
- Another stakeholder survey sent to guardians of current and prospective clients
- Two Boards and Leadership planning sessions along with retreats

In addition, they performed external environmental scans and reviewed internal financial and other data.

The following chart illustrates this multi-pronged approach that they took:



The numbers in brackets in the above chart show the number of individuals who were interviewed, or who responded to the impact survey or the stakeholder survey, and in the case of the focus groups, the number of focus groups conducted. Note that the Matrix Map impact survey included responses from nine internal staff members.

The internal interviews included the Chairperson of the Board, the President of the HHF Board, and select current and former staff members. The external interviews included a wide range of stakeholders, from funders to partners, clients' parents, and potential partners. The two focus groups conducted were with parents of current clients and with

staff members. In all interviews, surveys, and focus groups, anonymity was promised, to encourage individuals to provide honest feedback.

The Bold Agenda team presented the research data and insights to the HH Board, the HHF Board, and Leadership Team, to guide discussions during the two joint retreats. The first retreat focused on the discussion of Helping Hand's core values, vision, and mission, while the second retreat dived into Helping Hand's strategic protect and growth areas along with key, high-level, action items necessary to achieve its growth during the next two years. In each meeting, the attendees broke out into small groups to have focused conversations as facilitated by the consultants. The composition of the small groups changed between conversations, giving attendees a chance to work with and thus get to know different colleagues each time.

This Strategic Growth Plan is the result of the discussions that occurred at those meetings as well as an outcome from additional small group conversations that took place after these meetings.

### **3. Mission and Values**

After the Board, employees, and clients collaborated the following mission and vision statements have been created:

**HH's Mission:**

*"Transforming lives of all connected to HH through genuine care and education".*

**HH's Vision:**

*"For people with intellectual/developmental disabilities to be equally valued in all communities".*

### **4. Highlights of Environmental Scan**

#### Disability Sector's Demographic and Demand Trends

- Autism is the fastest-growing developmental disability, increasing 6-10% per year since 2002, and has been the primary driver of special education enrollment

increases in the past few years. Overall traditional special education enrollment was declining from 2004 until 2011; however, the increasing number of students with autism and more severe diagnosis caused special education enrollment to increase from 2011-2014. What this means is that a larger and larger proportion of special education enrollees are students with autism and more severe diagnosis as opposed to those with other types of developmental disabilities

- People with developmental disabilities are living longer and well into their 60s. The number of adults with I/DD aged 60 years and older is projected to nearly double by 2030. However, the illness they contract continues to start at a younger age.
- Demand is not always able to be filled for many key I/DD programs and services due to funding and mostly staffing constraints in the sector
- State and federal government officials are pushing deinstitutionalization with a shift from large to smaller, more personalized facilities. Parents are seeking smaller residential alternatives too. However, the need for CILAs (Community Integrated Living Arrangement) in Illinois has drastically increased to the point where the State adds 100 names to the State of Illinois list every month (may be due to no new CILAs because of lack of staff)
- Many organizations are transforming their adult day programs from a larger single facility to smaller, community-based sites so that clients are more integrated into their communities and the sites can serve families more conveniently
- Funders are increasingly encouraging collaborations and partnerships, to both increase impact and improve efficiency - these include pilot programs, shared services, joint ventures, and mergers and acquisitions

Illinois continues to have a challenging environment for serving people with disabilities for a variety of reasons:

- Illinois spends less than other states on I/DD services - \$2.72 per \$1,000 of income for Illinois vs. \$4.30 for the U.S. average. Also, Illinois spends less than it did in 2015 than in 2007 - \$1.73 billion in 2015 vs. \$1.89 billion in 2007
- Illinois ranks among the lowest (49th out of 50 states) in terms of its spending on and placement in small, community-based facilities

- Illinois has lagged the U.S. average for numbers of smaller residences (6 units or less) but is adding smaller residences at an increasing rate
- I/DD housing needs in Illinois are among the greatest in the U.S.
- Providers are beginning to look at not owning property
- Although an Employment First state, where employment is promoted, Illinois offers fewer opportunities for supported work than the U.S. average

### Benchmark Insights

Helping Hand was financially benchmarked against ten peer agencies. In addition, summary case studies were developed for ten peer agencies. Some key findings:

- Six of them were profitable (one in the most recent fiscal year while four experienced a loss, but only one peer agency experienced a deficit multiple years in a row like Helping Hand did from FY 2014 to FY 2017)
- Note that HH's financials include substantial rent payment (almost double the actual principal and interest for the properties) to the Helping Hand Foundation, at almost 10% of HH's budget
- Like Helping Hand, the majority of peer agencies rely predominantly on program service fees (including state reimbursements and government grants); however, for Misericordia and Aspire, a sizable portion of their income was contributions – indicating an opportunity for Helping Hand to increase its revenues from fundraising as well
- Six of them have social enterprise businesses - an opportunity for Helping Hand as well
- The case studies show varying examples of programs and ages served at peer agencies along with their differentiating factors, providing lessons learned for Helping Hand
- None appeared up to date with technology or the infrastructure needed

### Reputation, Satisfaction, and Brand Awareness of HH

- Parents of current clients are fairly satisfied with Helping Hand's services and programs. However, there is certainly much room for improvement to increase

their “very satisfied” rating (currently at 65%), “very good quality” rating (currently at 60%), and “very good value” rating (currently at 65%)

- Other stakeholders such as funders and partners praised Helping Hand’s programs, services, and caring staff
- The primary concern raised by parents and guardians of clients is the turnover of staff in the past few years that, they felt, resulted in both a sense of a loss of “heart” at HH and inconsistency of quality of services due to staff discontinuity
- Parents voiced their desire to be more engaged in promoting HH in the community, including even taking on leadership roles in fundraising for Helping Hand
- Helping Hand should strengthen its outreach and marketing to prospective clients - as an example, as much as 46% of the parents of prospective High School clients did not know enough about Helping Hand to rate its reputation (although 27% did say they are considering HH for post-High-School services)

#### Matrix Map’s Insights

- All ten of HH’s programs received high average impact scores (3+ out of a 4-point scale), with two programs (Outpatient Clinic and Ageing Program) receiving 3.5+
- Of the three impact criteria that were scored, for every single HH program:
  - “Filling an Important Gap” was rated the highest, at 3.4+
  - “Depth of Impact” was rated second highest, at 3.3+
  - “Excellence in Execution” was rated the lowest, at 2.6+ - indicating this area has the most room for improvement, especially for the following programs:
    - High School Transition
    - School for Children with Autism
    - Residential Housing, and
    - Employment
- The majority of HH’s programs are losing money on their own and would require fundraising to subsidize financially
- Helping Hand’s three largest programs, Residential, the School for Children with Autism, and Adult Day, are showing the largest deficits

### The Importance of Staff

- Labor shortages of Direct Service Professionals (DSPs) have reached crisis levels in Illinois. Until recently, wages had not increased for 9 years, resulting in increasing levels of turnover throughout the industry
- The demand for DSPs is projected to increase by 26% by 2024, while the core labor pool is expected to increase by only 1%, thereby putting pressure on wages. In addition, Cook County's minimum wage will grow to \$15 per hour by 2020 along with wages for competing retail jobs
- During the process of this project, HH raised its minimum DSP salary from \$10 per hour to \$11.25 per hour
- Statewide there are shortages among teachers, especially those qualified for special education
- As shortages continue, I/DD service providers have indicated that recruitment and retention have impacted their ability to provide optimal staff coverage, expand their services, develop smaller, more customized models, and/or accept referrals from those who require intensive staff support. As a result, many people with disabilities are not being served well
- Parents recognize the impact of high quality, attentive, well-trained staff on their loved one's health, employment, and educational progress
- Parents also recognize the impact of high quality, well-trained, and communicative management on their loved one's health, employment, and educational progress
- At the core of everything that parents and their children value at Helping Hand is the great staff - they want them to be well trained, have a "heart", and understand the needs of those whom they serve

### Employment / Independence for People with I/DD

- From the stakeholder survey, almost 38% of parents/guardians of current clients, and 43% of parents of prospective High School clients, would like to see Helping Hand start a social enterprise business
- Parents in the focus group were also highly supportive of the idea of a Helping Hand social enterprise

- Increasing independence and employment opportunities was a top-rated wish (52%+) by parents of prospective High School clients, and over 76% of them wanted to have more information on employment opportunities
- Beyond the social enterprise idea, more corporate partnerships are needed to increase job and internship opportunities, as well as strengthening vocational training
- In Illinois, the Council on Developmental Disabilities (ICDD) identified inclusive postsecondary education opportunities as a priority for their 2011-2016 five-year plan, and there are currently eight such programs in Illinois including one provided by Elmhurst College

#### Aging with I/DD

- People with developmental disabilities are living longer - mean age of death rose from 33 years old in the 1920s/30s, to 59 in the 60s, to 66 in 1993, according to a 1999 paper; and more recently, another study found average life expectancy to have increased to 71 for men with I/DD and 73 for women with I/DD by 2009. Currently Helping Hand's adult population's average age is 50 years old
- Similarly, for people with Down Syndrome - the mean age of death rose from 9 in the 1920s/30s, to 31 in the 60s, to 56 in 1993; and today, their average life expectancy is approximately 60 years with many living into their sixties and seventies
- The number of adults with I/DD aged 60+ in the U.S. is projected to nearly double to 1.2 million by 2030
- Signs of aging in population with I/DD may manifest earlier than in the general population, with age-related changes in their physical health, cognitive, and functional capacities that need to be considered and cared for
- Adults with Down Syndrome suffer from an increased prevalence of Alzheimer's Disease
- Almost 30% of parents/guardians of current clients want to see HH grow its services for the elderly, and other stakeholders suggested the same

- There is a significant need to bridge: services for people who are aging with services for people with I/DD
- Families of individuals with I/DD who are aging are also in dire need of additional support in the current setting or a CILA
- The implementation of the Aging program (across all adult programs) is a core competency of HH, receiving top ratings from stakeholders who responded to the impact survey

#### A Need for Board Development

- Staff and other stakeholders have received mixed messages from the Board and the HHF Board about the organization's mission and priorities in the last few years. Not all moving in the same direction
- Staff perceive that the Board has not been as engaged as it should be on key issues and appropriate placement of its leadership
- There are inconsistent and conflicting views of the role of members of the Board and the HHF Board as it relates to fundraising for Helping Hand
- There is a need for Board governance documents/policies and officer succession planning

#### Implications for Helping Hand

- Illinois' ongoing fiscal crisis and underfunding of I/DD services will continue to constrain growth in programs and services if reliance on the state continues - Helping Hand should significantly diversify its revenue streams, in particular with increased private pay, ISBE funding, contributions, and other earned revenues
- Community integration will increase, and greater outcomes will be expected for clients and their families - Helping Hand should strengthen and promote the work it is doing in existing communities and explore how to expand in new communities
- The pressure for smaller, more customized residential options will require a greater range of models - Helping Hand will need to raise capital and pilot new residential options to grow and better serve its clients while maintaining its existing models, which, if financially sound, could be grown

- Employment First will keep job readiness and support for the I/DD community - Helping Hand should deepen and expand its relationships with employers to provide opportunities for people with disabilities at all skill levels
- Services for aging individuals with I/DD will become increasingly needed - Helping Hand could develop partnerships with elderly care facilities for a transition of certain cases that Helping Hand is not equipped to manage
- Collaborations/partnerships will be the primary opportunity for sustained growth for serving the complex needs of people with disabilities in a resource-constrained environment - Helping Hand should identify current and potential partnership opportunities that can deliver high impact outcomes for its clients
- Outreach and communications of a clear, unified mission to external stakeholders and potential clients will be key to spreading brand awareness of Helping Hand, thus increasing its reach and impact
- Increasing labor shortages for DSPs and special education professionals may negatively impact Helping Hand's quality and growth - Helping Hand must prioritize strengthening its employee recruiting, retention, and engagement practices to remain competitive and continue to offer high-quality services

## **5. Strategic Growth Areas for Helping Hand**

HH evaluated several scenarios against criteria that will drive the successful implementation and impact of the Strategic Protect and Growth Plan. The following criteria were used to help the organization focus on its priorities:

- Builds on Helping Hand's existing strengths
- Feasible for Helping Hand to scale program for maximum impact
- Feasible for Helping Hand to excel at in the next two fiscal years
- Has potential to be financially sustainable
- Has potential to build a differentiated brand around
- Complements other programs at Helping Hand - increasing their impact/success

As a result of this process, the Board and Leadership Team identified the following six areas for Helping Hand's next 3 years of growth:

- **Become the “Best Place to Work” in the I/DD service sector by leading with heart:**

To ensure that HH attracts and retains top talents to continue delivering high-quality services, it will: maintain Direct Service Professionals' (DSPs) wages at 125% of the median pay in the salary range; create a more robust and competitive compensation package; develop a funded program that rewards outstanding staff at least quarterly; create and implement a clear plan for career advancement at all staff levels; provide professional development opportunities for all exempt employees, and ensure and improve how “staff's voices are heard” (grievances, ideas, “town halls”). In addition, HH will work to reduce the impact to clients and families of transitions from staff turnover. It will also create innovative health & wellness programs for employees that demonstrate that a health-focused environment results in improved health outcomes and lower costs. As a representation of the impact of these improvements and changes, HH intends to win or be the runner-up for a major award from a credible agency as the Best Place to Work within the next two fiscal years.

- **Build financial/operational strength to attain growth in a fiscally sound manner while continuing to fund/expand current services:**

HH will achieve a 1% positive net income margin on the Center's budget during Fiscal Year 2019 and 1.5% in the Fiscal Year 2020 and 2021. It will increase its “cash on hand” from one payroll to 3 months of expenses. It will explore acquisitions and mergers to drive its impact, growth, and efficiency as well as joint ventures with other agencies to create a service plan for needed services. The Helping Hand and the Foundation will double fundraising- to at least \$1.0 million to support HH's growth and fiscal stability in Fiscal Year 2019, and to \$1.5 million in the Fiscal Year 2020. HHF has also set a goal to increase HH's endowment to \$2.5 million. A key part in strengthening HH's and HHF's fundraising efforts is to increase the Boards'

annual give/get to \$2,500 per person for Fiscal Year 2020 with 100% participation. In addition, HH will document expectations and develop a strategy for family participation in fundraising, by notifying new and existing clients of the gap in funding for the services that they receive. Finally, HH will ensure it is positioned for Managed Care Funding.

- **Strengthen brand recognition and communications:**

HH will be rated as having a “very good reputation” by 80% or more of prospective clients in the region. It will achieve level gold or better from “GuideStar”. It will position then expand Helping Hand’s Brand to align with its vision and direction. It aims to be recognized as a preferred source of talent by local employers willing to hire people with disabilities. And HH recognizes the need to improve its education and communications to family members and the local community. It will also define and clearly articulate the roles and responsibilities of the Board and the HHF Board. Additionally, HH will continue to gather feedback from various important stakeholders (families, sponsors, community) consistently and regularly to advise staff and Board on the implementation of these growth areas.

- **Strengthen and develop the Board and the Foundation Board:**

The Board and the Foundation Board will have a unified vision and complementary missions. HH will have an engaged Board by setting standards and expectations of attendance at Board and Agency functions. In its recruiting, HH will strive to build a more diverse Board as demonstrated by the ratio of individuals of different genders, races, ethnicities, and professional backgrounds, to better match with the HH client demographics and fill knowledge and skill gaps on the Board. It will determine the best Board structure(s) and incorporate best practices in the Boards’ governance. HH will strive to communicate/educate and have the HHF Board match the advancements in strengthening/enhancing its membership similar to the HH Board as mentioned above.

- **Become a leader in innovative programming that incorporates technology:**

HH will research and assess new ways to use technology in all programs that will

help with outreach, level of independence, and improve staffing concerns. It will complete the feasibility study and budget for at least one social enterprise business venture for its clients, grossing 1% of the agency's revenue by the enterprise's third year of operation. Further, HH will determine the feasibility of operating smaller, community-integrated adult day programs as well as remote employment and virtual sites based upon the data highlights from this project's Environmental Scan.

- **Expand needed programs and services**

HH will double the number of transition students from High Schools (from 5 to 15) and double the amount of successful placement through the Department of Rehabilitation Services (from 19 to 38), compared with FY2017. HH will double the number of clients it serves through the aging program compared with FY2017 (increasing from 13 to 39). This may include expanding the agency's program rooms. This may include joint ventures with other agencies similar to HH which would allow HH to ensure proper care for its clients. HH acknowledges that the family and siblings of elderly clients need more structured support and/or therapy, which it will develop and facilitate. Finally, HH will determine the feasibility of: (i) increasing the number of residential homes keeping in mind that the clients are aging, and (ii) operating "technology" homes to help adults use fewer human supports.

## **6. Future Years' Actions Toward Achieving Strategic Growth**

Become the "Best Place to Work" in the I/DD service sector by leading with the heart

Starting in the Fiscal Year 2022 (or sooner if resources can be secured earlier), added pay, benefits, and other incentives to staff will be implemented. Continue with the professional development plan and the health & wellness plan in Fiscal Year 2020. Also, continue to make adjustments to improve the career advancement path adopted in the Fiscal Year 2020 including reimbursement for continued education. Effectively enforce and improve

the system whereby staff's voices are heard by management. Monitor the results from the metrics developed in Fiscal Year 2021 and measure them to account for health & wellness improvements for the staff, as well as the corresponding cost savings. Will have applied at the start of the Fiscal Year 2020 for the Best Place to Work award that is chosen – then, starting in the Fiscal Year 2021 will win or be runner-up for the award.

Build financial/operational strength to attain growth in a fiscally sound manner while continuing to fund/expand current services

During Fiscal Year 2019, the activities were designed to lay the foundation for strengthening the relationships, programs, and infrastructure to ramp up fundraising and a culture of philanthropy at all levels, including assessing a need for an endowment campaign by the end of the Fiscal Year 2020. Increased fundraising will be needed to expand the innovative and quality programs, launch a social enterprise, and strengthen the workplace culture and benefits. Also, funds will be needed to fill the gap from expected reductions in government funding for all programs and services in each successive Fiscal Year. Growth in Helping Hand's programs will require capital investment for facilities, furniture, and equipment and thus a need for a major capital campaign. The campaign will be the anchor for growing the endowment to meet the \$2.5M goal, and for ensuring Helping Hand's long-term financial sustainability. In addition, a feasibility study on establishing a Family Fundraising Committee will be conducted during Fiscal Year 2020, where clients' families would play a big part in helping HH reach its's fundraising projections; if deemed feasible, this initiative will be implemented. Implementation of any margin-improving program restructuring recommendations not beginning in Fiscal Year 2020 will begin and continue. HH will implement the Boards' new give/get policy beginning in Fiscal Year 2020. Along the way, the agency will continually evaluate any potential merger/acquisition opportunities as well that will expand the services without jeopardizing its current quality.

Strengthen brand recognition and communications

The fiscal year 2020 will be focused on executing the brand, marketing, and communications planning done in the Fiscal Year 2019, building Helping Hand's visibility and reputation across all programs and services not just in the local community. Much of the work in future years will be targeted to enhancing the relationship, messaging, and commitment with key stakeholders such as clients, employers, and funders, and executing the core growth areas such as independence, school, therapy, and a social enterprise. Also, more will be done to convey stories about client successes and the organization's innovation to a much broader audience, to help position Helping Hand as a thought leader and expert in the developmental disability community. The refreshed brand and marketing strategy will facilitate progress with a capital campaign but also catalyze attracting new leaders to the Board and Staff.

#### Strengthen and develop the Board and the Foundation Board

After clarifying the vision, governance structure and processes, and board members' roles and responsibilities in the Fiscal Year 2019, the Board and the Foundation Board can focus on elevating their work, executing their board action plans, and supporting the Strategic Protect and Growth Plan in Fiscal Year 2020 and the subsequent years. Each Board member will create an individual action plan that supports the strategic growth areas and allows them to share their talents. 100% participation by both Boards in fundraising, making connections, and recruiting more diverse and philanthropic board members will be the top priorities in advance of a capital campaign. Board members will be better equipped with the skills and talking points to discuss estate planning with major donors by the Fiscal Year 2020. Board leaders will emerge and be ready for major fundraising and a possible capital campaign as the Boards are strengthened and aligned with the strategic protect and growth priorities.

## **7. Conclusions**

Helping Hand is at an important juncture in its organizational growth. Stakeholders recognize its work as important in helping people with disabilities and their families pursue their highest potential. The Agency will build on its well-recognized programs and services

as it continues to evolve to meet the needs of a shifting demographic and changing market and funding realities. It must strengthen its operational and financial sustainability and its governance to not only survive but thrive. HH's current and future clients' quality of life depends on it achieving such transformation. With the clarity and focus developed through this Strategic Protect and Growth Plan, Helping Hand is now ready and committed to tackling its next phase of growth with confidence, as guided by the strategic growth areas outlined in this plan.

## 8. Strategic Planning Process Contributors

Helping Hand thanks the many active participants in the strategic growth planning meetings, including all the members of the Steering Committee, the Board of Directors, HHF Board members, and Helping Hand's staff, as shown below. HH is also incredibly grateful to the many external stakeholders (funders, partners, clients, sector experts, parents), too numerous to name here, who provided invaluable inputs through interviews, focus groups, and/or surveys conducted during this process.

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### STRATEGIC PLANNING STEERING COMMITTEE

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#### **From the Helping Hand Board:**

- Robert Ackermann (*President*)
- Mary Ann Cusick (*Strategic Planning Chair*)
- William Weigel

#### **From the Helping Hand Foundation Board:**

- Noreen Costelloe
- Frank Pigatto

#### **From the Helping Hand's Leadership Team:**

- Bill Dwyer (*Chief Executive Officer*)
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- Ken Gaul (*Chief Financial Officer*)
  - Jaclyn Jackson (*Senior Director, Human Resources*)
  - Melissa MacKay (*Senior Director, Adult Programming & Clinical Services*)
  - Mary Ann Madej (*Director, Finance*)
  - Sally Wilson-Gamble (*Senior Director, School for Children with Autism*)

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## OTHER BOARD MEMBERS

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### **From the Helping Hand Board:**

- Peter Daniels
- Steven Deinzer
- Michael Ettleson
- Wilson Francis (*term ended December 2017*)
- Donald Fries (*term ended December 2017*)
- Christopher Kurimay
- Daniel Linklater (*term ended December 2017, Ex-President*)
- Carol McGury (*Secretary*)
- John Neiweem
- Marc O'Brien (*term ended December 2017*)
- Thomas Rubey (*Treasurer*)
- Jason Shirk (*Vice President*)
- John Stibich
- Bridget Voigt (*term ended December 2017*)

### **From the Helping Hand Foundation Board:**

- Michael Cusick
- Howard Habenicht (*Treasurer*)
- Bill Howe
- Jeanne Reilly (*Secretary*)
- Michael Slinkman
- Herb Smyers (*President*)
- Mort Westman

## **9. APPENDIX**

### **Appendix I – Planning Sessions’ Pre-Read Slides (Research Insights)**

See separate PDF file.