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Executive Summary

Building on over 60 years of commitment in providing quality services to persons with disabilities to help them achieve their highest level of independence, Helping Hand Center (“HHC”) presents this Strategic Growth Plan that it believes will elevate the organization’s leadership position and significantly increase its impact in this sector.

HHC 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 2020. The Helping Hand Center Board (“Board”) and the HHC Leadership Team, along with the Helping Hand Foundation (“HHF”) Board and its Leadership Team, 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 HHC Leadership Team decided to continue with HHC’s current mission statement, fully embrace a set of updated shared values, as well as identified six key strategic growth areas on which Helping Hand Center will focus in the next two years.

HHC’s Mission:

“The mission of Helping Hand Center is to assist persons with disabilities to achieve their highest level of independence through quality programs and services.”

HHC’s Shared Values:

- **Empowered**: Drive ownership of and confidence in each person’s contribution - no matter what role or tenure.
- **Progressive**: Create and inspire amazing things that happen every day by being ahead of the curve without being out of reach.
- **Connected**: Providing opportunities for everyone to belong to a group or purpose of their choice.

HHC’s Strategic Growth Areas for Fiscal Years 2019-2020:
Helping Hand Center’s strategies were prioritized to build on its strength, maximize its impact in a relatively short period of time, become financially sustainable, enhance and differentiate its brand, and complement its other programs and services.

Its strategy focuses in on employment because there is nothing like work, whether paid or volunteer, to help people with disabilities find their greatest potential and become integrated into their community, thereby expanding the possibilities and impact for those with disabilities. HHC plans to deepen its connection and support of its staff because they are at the “heart” of what Helping Hand Center does to change lives daily. And finally, HHC will dedicate more resources to help its clients age with dignity and elevate the experience of those aging with disabilities.

- **Become a leader in empowering individuals with I/DD to achieve their individualized employment / education goals no matter the level of the individual:**
  - triple the number of transition students
  - complete feasibility study/budget for at least one social enterprise business venture for its clients
  - engage 10 new corporate employment partners
  - implement volunteer program teaching Empower clients in job-readiness skills
  - complete feasibility study/budget for remote day program/employment sites

- **Become known as a premium provider in serving the I/DD population that is aging:**
  - triple Grace Program size
  - develop strong partnerships with 2 elderly care facilities
  - develop program to maintain/audit services for clients moving to elderly care facilities
  - develop a health & wellness plan for all clients
  - complete study of operating residential homes for our aging population

- **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 impact on clients/families during staff turnover
  - maintain DSPs wages at 125% of the median pay
  - create a more robust and competitive compensation package
  - create and implement a clear plan for career advancement at all staff levels
  - ensure and improve how “staff’s voices are heard”
  - create innovative health & wellness programs for employees
- win/be runner-up for 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 2 fiscal years
  - double operational fundraising
  - increase endowment to $2.5 million
  - require board member 100% participation in yearly donations
  - design a program to make clients aware of the funding gaps

- **Strengthen brand recognition and communications:**
  - expand and align Brand with agency visions
  - educate and communicate with client families
  - clearly define board member roles and obligations
  - on an ongoing basis continue to gather stakeholder feedback

- **Strengthen and develop the Board and the Foundation Board:**
  - create unified vision and complementary missions
  - build a more diverse Board
  - strive for best practices in governance

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

For more than 60 years, Helping Hand Center (“HHC”) has committed to providing quality services to persons with disabilities to help them achieve their highest level of independence. Today, HHC provides services to all ages of individuals - from the very youngest in its Children’s Outpatient Clinic to school-age students in its School for Children with Autism and High School transition students, and to adults and elderly in its day programs, employment services and residential programs.

As the demographic as well as client needs have shifted, coupled with changes in funding and organizational leadership, HHC 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 two years. These insights brought greater clarity on what makes Helping Hand Center a special place and focused the Board and staff on what matters most in the future. With this understanding, HHC developed clear growth areas for Fiscal Years 2019 and 2020 with accompanying action plans that are aligned with the current mission, vision and values.

2. **Overview of Strategic Planning Process**

HHC 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 6 internal and 10 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 Board and Leadership planning sessions / 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 9 internal staff members.

The internal interviews included the President of the Board, the Chairman 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, in order to encourage individuals to provide honest feedback.

The Bold Agenda team presented the research data and insights to the HHC Board and Leadership Team, and to the HHF Board and its Leadership Team, to guide discussions during
the two joint retreats. The first retreat focused on the discussion of Helping Hand Center’s core values, vision and mission, while the second retreat dived into Helping Hand Center’s strategic growth areas and 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 outcome from additional small group conversations that took place after these meetings.

3. Mission and Values

Discussions from the first retreat reaffirmed Helping Hand Center’s core values and mission.

HHC decided that, for now, its mission statement will remain unchanged as follows:

“The mission of Helping Hand Center is to assist persons with disabilities to achieve their highest level of independence through quality programs and services.”

And it developed a more succinct set of three core values for Helping Hand Center to be used as a guide for employees, board members, programing, and clients, as follows:

- **Empowered**: Drive ownership of and confidence in each person’s contribution - no matter what role or tenure.
- **Progressive**: Create and inspire amazing things that happen every day by being ahead of the curve without being out of reach.
- **Connected**: Providing opportunities for everyone to belong to a group or purpose of their choice.
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 special education enrollment was declining from 2004 until 2011; however, increasing number of students with autism 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 as opposed to those with other types of developmental disabilities (the latter has actually decreased in number in recent years)

- 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

- Demand is not always able to be filled for many key I/DD programs and services due to funding and 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

- Many organizations are transforming their adult day programs from 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.
• 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 Center 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 in the most recent fiscal year while four experienced a loss, but only one peer agency experienced a deficit two years in a row like Helping Hand Center did
• Note that HHC’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 HHC’s budget
• Like Helping Hand Center, majority of peer agencies rely predominantly on program service fees (including government grants); however, for Misericordia and Aspire, a significant portion of their income was contributions – indicating opportunity for Helping Hand Center to increase its revenues from fundraising as well
• Six of them have social enterprise businesses - an opportunity for Helping Hand Center 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 Center

Reputation, Satisfaction and Brand Awareness of HHC
• Parents of current clients are fairly satisfied with Helping Hand Center’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 Center’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 HHC and declining quality of services due to staff discontinuity
● Parents voiced their desire to be more engaged, including even taking on leadership roles, in fundraising for Helping Hand Center and/or the Foundation
● Helping Hand Center 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 Center to rate its reputation (although 27% did say they are considering HHC for post-High-School services)

Matrix Map’s Insights
● All ten of HHC’s programs received high average impact scores (3+ out of a 4-point scale), with two programs (Pediatric Clinic and GRACE) receiving 3.5+
● Of the three impact criteria that were scored, for every single HHC 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
● Majority of HHC’s programs are losing money on their own and would require fundraising to subsidize financially
● Helping Hand Center’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, HHC 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 or at all
- Parents recognize the impact of high quality, well trained staff on their loved ones’ health, employment and educational progress
- At the core of everything that parents and their children value at Helping Hand Center is great staff - they want them to be well trained, have a “heart”, and understand the needs of those whom they serve

**Employment / Education of 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 Center start a social enterprise business
- Parents in the focus group were also highly supportive of the idea of a Helping Hand Center social enterprise
- Increasing vocational / 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 the strengthening of 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 that is affiliated with the Ray Graham Association
Aging with I/DD

- People with developmental disabilities are living longer - mean age of death rose from 33 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
- Similarly for people with Down Syndrome - 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 taken into account 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 HHC 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 and services for people with I/DD
- Families of individuals with I/DD who are aging are also in dire need of additional support
- The implementation of the GRACE program is a core competency of HHC, receiving top ratings by stakeholders who responded to the impact survey
- Coordination of Care will be needed to address the different service demand, such as partnering with elderly care facilities for patient transferal when Helping Hand Center is no longer equipped to care for them

A Need for Board Development

- Staff and other stakeholders have received mixed messaging from the Board and the HHF Board about the organization’s mission and priorities
- Staff perceive that the Board has not been as engaged as it should be on key issues
- There are inconsistent and conflicting views of the role of members of the Board and of the HHF Board as it relates to fundraising for Helping Hand Center
Implications for Helping Hand Center

- Illinois’ ongoing financial crisis and underfunding of I/DD services will continue to constrain growth in programs and services if reliance on the state continues - Helping Hand Center should significantly diversify its revenue streams, in particular with increased contributions and earned revenues
- Community integration will increase and greater outcomes will be expected for clients and their families - Helping Hand Center 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 Center 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 as priority services for the I/DD community - Helping Hand Center 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 Center should develop partnerships with elderly care facilities for transition of certain cases that Helping Hand Center 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 Center 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 Center, thus increasing its reach and impact
- Increasing labor shortages for DSPs and special education professionals may negatively impact Helping Hand Center’s quality and growth - Helping Hand Center must prioritize strengthening its employee recruiting, retention and engagement practices to remain competitive and continue to offer high quality services

For more detailed insights and findings from the comprehensive environmental scans, please refer to the separately attached PDF file as referenced in Appendix I.
5. **Strategic Growth Areas for Helping Hand Center**

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

- Builds on Helping Hand Center’s existing strength
- Feasible for Helping Hand Center to scale program for maximum impact
- Feasible for Helping Hand Center 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 Center - increasing their impact/success

As a result of this process, the Board and Leadership Team identified the following 6 areas for Helping Hand Center’s next 2 years of growth:

- **Become a leader in empowering individuals with I/DD to achieve their individualized employment / education goals no matter the level of the individual:**

  HHC will triple the number of transition students from High Schools (from 5 to 15), and double the amount of successful placement through Department of Rehabilitation Services (from 19 to 38), compared with FY2017. 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, HHC will engage with at least 10 more strong corporate partners (doubling from today’s 10 partners to 20) to provide meaningful employment opportunities to its clients and have at least 70% of its employed clients staying in their jobs for 6 months or more. Through the creation of a volunteer program, community members will regularly volunteer their time and talent to help 90% of HHC’s Empower clients develop job-search and job-readiness skills. Finally, HHC will determine the feasibility of operating smaller, community-integrated adult day programs as well as remote employment sites based upon the data highlights from this project’s Environmental Scan.
• **Become known as a premium provider in serving the I/DD population that is aging:**

HHC will rebrand its “aging” program using the “Grace” curriculum, and triple the number of clients it serves through that program compared with FY2017 (increasing from 13 to 39). This may include expanding the agency’s program rooms. HHC will develop strong partnerships with at least 2 elderly care facilities such that there is an option, if necessary, to transition select elderly clients there. This may include joint ventures with other agencies similar to HHC which would allow HHC to ensure proper care for its clients. HHC will develop a program to ensure that it will still offer managed care to each client moved to another facility, that includes advocacy initiatives for the client, as warranted. By developing a health & wellness plan for clients who are elderly or aging, and using that for younger aged clients, the agency will demonstrate that a health-focused environment results in improved measurable health outcomes. HHC acknowledges that family and siblings of elderly clients need more structured support, which it will develop and facilitate. Finally, HHC will determine the feasibility of: (i) increasing the number of residential homes that are specifically designed for clients who are elderly or aging, and (ii) operating select respite services for families with elderly relatives with I/DD.

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

To ensure that HHC attracts and retains top talents in order 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, HHC 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,
HHC 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 2 fiscal years.

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

  HHC will achieve 1% positive net income margin on the Center’s budget during Fiscal Year 2019 and 1.5% in Fiscal Year 2020. 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 the aging. The Center and the Foundation will double fundraising- to at least $1.0 million to support HHC’s growth and fiscal stability in Fiscal Year 2019, and to $1.5 million in Fiscal Year 2020. HHF has also set a goal to increase HHC’s endowment to $2.5 million. A key part in strengthening HHC’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, HHC 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, HHC will ensure it is positioned for Managed Care Funding.

- **Strengthen brand recognition and communications:**

  HHC will be rated as having a “very good reputation” by 80% or more of prospective clients in the region. It will position then expand Helping Hand Center’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 HHC 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, HHC will continue to gather feedback from various important stakeholders (families, sponsors, community) in a consistent and regular way 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. HHC will have an engaged Board by setting standards and expectations of attendance at Board and Agency functions. In its recruiting, HHC 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 HHC 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. HHC will strive to communicate/educate and have the HHF Board match the advancements in strengthening/enhancing its membership similar to the HHC Board as mentioned above.
6. Future Years’ Actions Toward Achieving Strategic Growth

Become a leader in empowering individuals with I/DD to achieve their individualized employment / education goals no matter the level of the individual

The work completed during Fiscal Years 2019 and 2020 will provide the basis to move forward with deciding on which social enterprise idea is feasible and begin implementing that idea, with a goal of piloting a social enterprise within Fiscal Year 2021. Agreements with an expanded set of employers will have been completed and decisions will have been made as to which industries to focus on for employment. The volunteer plan, High School marketing plan and vocational expansion plan will also be implemented in Fiscal Year 2021. In addition, the completed feasibility study of operating smaller, community-integrated adult programs (including employment) will have been completed, and if proven to be desirable, HHC will begin piloting them in Fiscal Year 2021.

Become known as a premium provider in serving the I/DD population that is aging

Based on the strategy and business plan developed in Fiscal Year 2020, which would include CILA expansion feasibility analysis, day and residential facility and program expansion will begin for the “Aging” program if it has not already. In addition, metrics developed in Fiscal Year 2019 will be measured to account for health & wellness improvements for the elderly clients. The plan and criteria on client transition (if needed) into elderly care facilities developed in Fiscal Year 2020 will be implemented. Expanded support programs for clients’ families will begin to be implemented, if not already, based on the plan developed.

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

Starting in Fiscal Year 2021 (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 Fiscal Year 2020. Effectively enforce and improve the system whereby staff’s voices are clearly heard. Monitor the results from the
metrics developed in Fiscal Year 2020 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 Fiscal Year 2020 for Best Place to Work award that is chosen – then, starting in 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 preparing for the launch of an endowment campaign by the end of Fiscal Year 2020. Increased fundraising will be needed to expand the employment and aging 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 Center’s programs will require capital investment for facilities, furniture, and possibly 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 Center’s long-term financial sustainability. In addition, a feasibility study on establishing a Family Fundraising Committee will be conducted during Fiscal Year 2019, where clients’ families would play a big part in helping HHC reach its’s fundraising projections; if deemed feasible, this initiative will be implemented. Implementation of any margin-improving program restructuring recommendations not begun in Fiscal Year 2020 will begin and continue. HHC 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.

Strengthen brand recognition and communications

Fiscal Year 2020 will be focused on executing the brand, marketing and communications planning done in Fiscal Year 2019, building Helping Hand Center’s visibility and reputation across all programs and services. 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 employment, aging 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 Center as a thought leader in the developmental disability community. The refreshed brand and marketing strategy will facilitate progress with a capital campaign but also serve as a catalyst in 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 Fiscal Year 2019, the Board and the Foundation Board can focus on elevating their work, executing their board action plans and supporting the Strategic 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 Fiscal Year 2020. Board leaders will emerge and be ready for the capital campaign as the Boards are strengthened and aligned with the strategic growth priorities.
7. Conclusions

Helping Hand Center 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 in order 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 in order to not only survive but thrive. HHC’s current and future clients’ quality of life depends on it achieving such transformation. With the clarity and focus developed through this Strategic Growth Plan, Helping Hand Center is now ready and committed to tackle 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 Center thanks the many active participants in the strategic growth planning meetings, including all the members of: the Steering Committee, the Center's Board of Directors, HHF Board of Directors, and Helping Hand Center's staff, as shown below. HHC is also very 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.

STRATEGIC PLANNING STEERING COMMITTEE

From the Helping Hand Center 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 Center's Leadership Team:
● Bill Dwyer (Chief Executive Officer)
● 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)

From the Helping Hand Foundation's Leadership Team:
● Jennifer Wojcikowski (Chief Philanthropy Officer)
OTHER BOARD MEMBERS

From the Helping Hand Center 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.