



*Empowering adults with  
disabilities since 1975*

**2022-2025 LADD Strategic Plan**

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## LADD Plan 2025 Vision, Goals and Objectives

**LADD leads the transformation of disability housing and services across the nation—furthering independence and creating sustainable and meaningful service models for adults with developmental disabilities. LADD is a recognized and respected voice for community inclusion and innovation in our field.**

### Objective 1

*Meet our strategic growth goals while remaining committed to excellence in service and sustainability of our internal operations.*

#### **I. Scale Smart Living Supports – promote and grow to become LADD’s biggest program (Brian)**

- A. Create a Business Plan to scale Smart Living Supports, assess the possibility of additional revenue streams in the plan including data analytics, training and licensing or revenue sharing agreements (Brian)

2022: Begin to scale tech-enabled supports

2023: Business Plan execute/goals achieved

2024: Business Plan execute/goals achieved

- B. Complete the pilot with Xavier University, assess the data and determine next steps

2022: Receive second year data from Xavier University

2023: Receive final data and publish data

2024: n/a

- C. 300 people moved to remote support programs over three years in our region

2022: 100 (cumulative)

2023: 200 (cumulative)

2024: 300 (cumulative)

#### **II. Create a highly regarded intake process and parent community for all LADD programs (Carolyn)**

- A. Hire an intake coordinator and family liaison

2022: Evaluate and assess this position relative LADD’s current communications and volunteer coordination, develop job expectations and benchmarks and hire coordinator

2023: Measure against benchmarks developed

2024: Measure against benchmarks developed

- B. Establish clear parameters and expectations for family engagement and communication

- 2022: Complete
- 2023 and 2024: Train staff
- C. .Build a meaningful community among parents and HLADD contractors including social gatherings, updates and events
- 2022: Planning
- 2023: Quarterly trainings and social gatherings (attended by at least 25 individual family members and contractors)
- 2024: Monthly newsletter and quarterly trainings (attended by at least 45 individual family members or contractors)
- D. Become an ongoing resource for parents
- 2022: Do parent interviews and assess and plan 2023 and 2024 goals; coordinate with the Center of Community Inclusion to find alignment
- 2023: Deliver on goals
- 2024: Deliver on goals
- III. Create senior living (55+) designed to provide specialized supports for people to age in dignity (Brian)**
- 2022: 1) Establish clear written guidance and standards for our Aging Programs—including a means to maintain the minimum age of entry to 55+ in perpetuity, to prevent this site from returning to its current status as a group home and to ensure that this development reflects what is happening in broader community in aging
- 2) Raise at least 50% of amount needed prior to breaking ground (Molly)
- 3) Break ground
- 2024: Complete construction
- IV. Build an inclusive, dynamic and efficient workplace culture where employees thrive and deliver consistent supports that meet LADD’s standard of excellence. (Paul)**
- A. The LADD Way rollout is complete:
- 2022: Assess and continue the current LADD Way rollout. Assess and finalize a customer service standard/model. Assess and finalize what excellence for the people we serve is based upon existing research and data. Review and create parameters for compliance and identify what the differences are between compliance and excellence in service. Ensure both are realized in day-to-day operations, including in ISP preparation. Develop training–outcome benchmarks
- 2023: Execute on training plan and evaluate
- 2024: Execute on training and look at benchmarks to assess progress
- B. Staff turnover remains at around 25% or 1/2 to 1/3 of the state and national averages

- C. LADD employees at every level and the LADD Board of Directors better reflect the Hamilton County census, with a primary focus on race (Susan)
- 2022: Continue with the LADD Nominating Committee goals and plan. Continue showing progress on the LADD E&I Benchmarks
- 2023: Complete, continued progress
- 2024: Maintain
- D. The LADD Board of Directors increases its accommodations/engagement for and with people with intellectual disabilities and includes additional people with disabilities
- 2024: Complete
- E. Create a board level group of people we support that has specific charges and goals and support from staff—ensuring that those we support have a voice on issues they care about
- 2024: Complete
- F. Create a 360-feedback loop for front-line employees:
- 2022: Assess and create a communication protocol for front-line employees to express how changes are impacting service delivery
- Create pulse surveys
- 2023: Consistently utilize and measure pulse survey data—report to E&I Committee
- G. Become an outcomes-based organization, ensuring accurate and easy reporting of data that informs whether or not we are doing an exceptional job and realizing the excellence we have defined for ourselves
- 2022: See Objective 1/Goal IV/A; continue to conduct data-based stress tests

## V. Excellence in financial stewardship (David) and fundraising (Molly)

### A. Meet annual fundraising goals—establish goals for the Mark and Mom Fund for staff bonuses (Molly)

	2020	2021 Budget	2022	2023	2024
<b>Mark and Mom Fund (cumulative)</b>			<b>\$ 150,000</b>	<b>\$ 175,000</b>	<b>\$ 200,000</b>
<b>Phase III</b>		<b>\$ 500,000</b>	<b>\$1,500,000</b>	<b>1,000,000</b>	<b>\$ 500,000</b>
<b>Annual Giving</b>	<b>\$ 795,164</b>	<b>\$ 664,600</b>	<b>\$ 681,000</b>	<b>\$ 685,000</b>	<b>\$ 720,000</b>
Annual Campaign	\$ 266,540	\$ 250,373	\$ 255,000	\$ 260,000	\$ 270,000
Sponsorships & Events	\$ 17,774	\$ 33,000	\$ 33,000	\$ 35,000	\$ 40,000
Car Raffle	\$ 255,100	\$ 233,600	\$ 233,600	\$ 235,000	\$ 240,000
LADD Grants	\$ 255,750	\$ 148,000	\$ 160,000	\$155,000	\$ 170,000
<b>OTR Film Festival</b>	<b>\$ 236,129</b>	<b>\$ 206,000</b>	<b>\$370,000</b>	<b>\$ 455,000</b>	<b>\$ 505,000</b>
Film Festival Sponsorships/ Grants (cash)	\$ 235,166	\$ 190,000	\$ 325,000	\$ 400,000	\$450,000
Ticket Sales	\$ 963	\$ 16,000	\$ 20,000	\$ 20,000	\$ 20,000
Year-Round Sponsorships/ Grants			\$ 25,000	\$ 35,000	\$35,000
<b>Total:</b>	<b>\$1,031,293</b>	<b>\$1,370,600</b>	<b>\$2,701,000</b>	<b>\$2,315,000</b>	<b>\$1,925,000</b>

### B. Continue to further fiscal stewardship at LADD (David)

1. Reduce reliance on the investment draws to cover direct support program costs and move towards long-term goal of endowment draws going toward future endeavors and repair and replace needs

2022: See pro forma budget at end of this Plan

2023: See pro forma budget at end of this Plan

2024: See pro forma budget at end of this Plan

### C. Establish a 10-year capital maintenance repair plan (to include technology) approved by the Finance Committee (David)

2022: Coordinate with COO to assess current technology assessment/hardware replacement completed/assessment plan and timeline plan developed. Assess agency fleet and develop a replacement plan. Assess current level of funding in the R&R Fund (Paul)

2023: Complete a comprehensive assessment of all the agency facilities, furniture fixtures and equipment; develop a draft 10-year Capital R&R Plan

2024: Complete and approved

- D. Maximize revenue from billing (measurements include unbillable trends) and billing errors (David)
- 2022: Establish benchmark measurements: unbillables, billing errors, timing and uncollectables
  - 2023: Meet benchmarks
  - 2024: Meet benchmarks
- E. Assess and determine whether or not LADD can use debt to fund capital priorities (David)
- 2022: Establish our debt tolerance (ceiling)
  - 2023: Align our debt tolerance with our capital needs
  - 2024: Project out potential projects in need of financing and align with the 10-year R&R Plan and our long-term fundraising goals
- F. 3603 Developers: position ourselves to add and maintain more Forever, Homes (Brian)
1. Complete the current Forever, Home campaign and add Forever, Homes only if capital is provided (we will not launch another campaign)
    - 2022: Add final 2-3 homes
    - 2023: Add 3 homes (pending funding)
    - 2024: Add 3 homes (pending funding)
  2. We establish a funding structure with approval from the Finance Committee
    - 2022: Create a business model and long-term vision
  3. Develop a maintenance plan and budget for Forever, Homes as part of LADD's Repair & Replace budget
    - 2024: Complete
- G. Achieve program growth goals by 2024 (Carolyn)
1. HLADD growth (shared living): 72% growth over three years (approximately 50 people)
  2. Community Supported Living (CSL) Program growth: Add 16 people through Forever, Home and all future growth is driven by staffing capacity and geography
  3. License growth: Acquire a minimum of 8 more licenses
  4. Community Connections Program (CCP) growth (day programs): 133% growth over three years (approximately 100 people)
  5. Health and Wellness growth: By 2024, all staff receive H&W training and H&W ISP outcomes training
  6. SOAR Growth: Diversify funding for this program
  7. Supported Employment Growth: Goal is to achieve 51% participation for all housing programs, other than our voucher program (SOAR)

8. FAW & Geier Apartments: Repair and replace of apartments remains on pace (Paul) (annual)
  9. Future Growth: Assess future growth opportunities and present to strategic planning committee (2024)
- H. Stay focused on current goals (Susan)
1. We will not expand into mental health services in the next three years
  2. We will not create a non-medical transportation service. However, we will utilize geographic efficiencies as well as our vehicles fleet to see if we can expand transportation options. We will also seek to participate in partnerships and/or explore innovative transportation solutions
  3. We will not seek to expand out-of-state services other than Smart Living Supports

## **Objective 2**

*Develop and test geographic efficiencies in coordination with tech-enabled supports/Smart Living (Self-Directed Teams) (Brian)*

- I. Define parameters for what constitutes a geographic cluster, jurisdiction or district**  
2022: Complete
- II. Create a staffing model that could work and involve shared staff and services—pilot in the clusters or areas of natural concentrations**  
2023: Complete/Anderson cluster
- III. Develop a means for assessing the financial efficiencies of creating a geographic based service model (David)**  
2022: Collect data  
2023: Complete assessment
- IV. Identify ways to expand transportation with geographic based service model**  
2023: Assess if we can utilize CCP vans for non-day program needs; look at other means of transportation as well
- V. Train all staff in the pilot to deliver day programs, employment and Health & Wellness**  
2023: Complete
- VI. Ensure all programs are collaborating in every cluster/jurisdiction**  
2024: Complete



### Objective 3

*LADD becomes a recognized voice for community inclusion and innovation for and with people with developmental disabilities in our community and among national funders. (Molly)*

**I. Founding the LADD Center for Community Inclusion (LADD CCI— this is a placeholder name) whose mission is to further community inclusion for and with people with disabilities through Storytelling, Training, Education and Research**

A. Establish a board level advisory committee for LADD CCI to include Honorary Members

2022: Complete

B. Create and execute a plan to bring LADD’s cultural and educational programming: the OTR International Film Festival and research collaborations under LADD CCI

2022: Complete

C. Identify key partners to co-host/organize year-round programming such as: The Urban League, UCCEDD/LEND, Cincinnati Bar Association, Down Syndrome Association of Greater Cincinnati, Center for Dignity in Healthcare for People with Disabilities and The Children’s Home

2022: Ongoing

2023: Ongoing

2024: Ongoing

**II. Continue to ensure that the OTR International Film Festival is a highly successful and profitable event (measurements needed)**

A. Identify films and programming and events that appeal to our priority constituencies: LADD families and contractors, adults with developmental disabilities, families of children with disabilities, decisionmakers, corporate leaders

2022: Complete

2022: Succession plan for OTR International Film Festival leadership—including how to transition out of development

B. Build a membership program

2022: Create a plan and pricing structure and launch during the film festival

2023: 150 members

2024: 250 members

**III. Develop and potentially expand existing research relationships and further academic partnerships by 2024 (Jason)**

- A. Miami University (Health & Wellness)
- B. Explore a partnership with Miami University’s Scripps Gerontology Center for the VP Campus Programming
- C. Xavier University (Smart Living)
- D. University of Cincinnati Film Studies Program (Film Festival)
- E. University of Cincinnati DAAP (Architecture & Design School) (Universal Design and technology)
- F. Howard University (how technology impacts diabetes)
- G. Explore CCHMC potential partnerships
  - 1. UC LEND (Leadership Education in Neurodevelopmental and related disabilities) Training Program and UCCEDD (potential Smart Technology partnership)
  - 2. Developmental Disability and Behavioral Pediatrics (DDBP)
  - 3. SOAR Program (CVG partnership—kids learn how to fly). This program has expanded to sensory friendly activities consulting (Jen Smith). Currently, they are sharing best practices for sensory friendly experiences (Ballet, Reds, Zoo and Children’s Theater, Art Museum are some of their clients)

**IV. LADD is recognized for excellence in service, community inclusion and innovation among decisionmakers in Ohio, national funders, leaders in our field and local families who have a loved one(s) with developmental disabilities (Molly)**

- A. Identify key marketing partner/talent to increase brand identity among our target groups
  - 2023: Secure funds for national PR support and planning and hire consultant
  - 2024: Execute on plan
- B. Secure earned media stories throughout the year
  - 2022: Meet with ALL local news outlets—build relationships
  - 2023: Become a local expert on IDD
  - 2024: Secure national earned meeting with the help of a contractor
- C. Determine best framework to connect with and engage national high profile influencers and experts.
  - 2022: Create and identify members (5 minimum)
  - 2023: Announce membership
- D. Present at and/or sponsor local disability conferences and events

- 2022: UC/UCEDD Transition Fair sponsorship and speaking, identify sponsorship priorities
  - 2023: Continue sponsorship plan
  - 2024: Continue sponsorship plan
- E. Identify opportunities to present at national disability and technology conferences and events where national funders will be present
- Ongoing: Present at the Stanford Social Innovation Conference, present at Disability:IN Conference, Ruderman Inclusion Summit, All and Everything International Humanities Conference
- F. Partner with social media platforms that further disability rights and inclusion to host a podcast celebrating the families and the people we support, artists from the film festival, our partners in training and research and other decisionmakers furthering disability rights and full community inclusion
- 2022: Create a podcast plan and possible fundraising; launch TikTok page
  - 2023: Launch podcast/promote through Jason's Connection/engage visitors from the film festival and from the honorary board/identify issues to explore
  - 2024: Secure 250 followers for our podcast
- G. Engage LADD Families as active volunteers
- 2022: Create a family communication and volunteer plan and execute

## Proforma Budget

LADD, Inc  
 FY 2022 - 2024 Operational Strategic Plan Proforma Budget  
 with Comparative Data for FY 2019 -2021

	FY 2019 Actual	FY 2020 Actual	FY 2021 Estimated	FY 2022 Estimated	FY 2023 Estimated	FY 2024 Estimated
<b>Revenue</b>						
<b>Programs</b>						
Total Community Supportive Living Services	3,748,976	5,009,897	4,538,268	5,808,221	6,889,301	8,622,619
Shared Living (HLADD)	2,602,416	2,839,313	2,923,044	3,166,224	3,583,331	4,114,195
Community Connections	383,209	356,782	416,796	463,263	649,132	835,000
Room and Board	534,787	605,241	581,148	677,058	731,789	945,971
Heidt House Construction Project	226,326	215,081	-	-	-	-
Supportive Employment	115,930	97,814	81,012	83,037	85,113	87,241
SOAR	165,674	209,908	186,564	191,228	196,009	200,909
Film Festival	757,210	156,973	458,163	370,000	455,000	505,000
Academy	147,391	275,201	330,134	-	-	-
Other	23,598	207,595	70,164	70,983	72,758	74,577
<b>Total Program Revenue</b>	<b>8,705,517</b>	<b>9,973,805</b>	<b>9,585,293</b>	<b>10,830,014</b>	<b>12,662,432</b>	<b>15,385,512</b>
<b>Development</b>						
Grants and Contributions	448,079	556,573	698,318	415,000	415,000	440,000
Special Events	188,369	255,300	233,600	266,600	270,000	280,000
<b>Total Development</b>	<b>636,448</b>	<b>811,873</b>	<b>931,918</b>	<b>681,600</b>	<b>685,000</b>	<b>720,000</b>
<b>Other</b>	<b>110,022</b>	<b>433,193</b>	<b>10,608</b>	<b>10,553</b>	<b>10,817</b>	<b>11,088</b>
<b>Total Revenue</b>	<b>9,451,987</b>	<b>11,218,870</b>	<b>10,527,819</b>	<b>11,522,168</b>	<b>13,358,250</b>	<b>16,116,599</b>
<b>Expenses</b>						
Programs	8,589,438	9,021,542	8,861,491	9,533,215	11,153,349	13,397,376
Management & General	755,915	996,619	1,217,595	1,371,505	1,526,226	1,673,324
Development	454,931	332,317	304,768	386,478	421,614	445,466
<b>Total Expenses</b>	<b>9,800,284</b>	<b>10,350,478</b>	<b>10,383,854</b>	<b>11,291,199</b>	<b>13,101,189</b>	<b>15,516,165</b>
<b>Program Operating Income/(Loss)</b>	<b>\$ (348,297)</b>	<b>\$ 868,392</b>	<b>\$ 143,975</b>	<b>\$ 230,969</b>	<b>\$ 257,060</b>	<b>\$ 600,434</b>
<b>Strategic Operations</b>			<b>353,328</b>	<b>512,161</b>	<b>524,965</b>	<b>538,089</b>

\* Operating Income/(Loss) Before Endowment Draws

Updated 9/13/2021