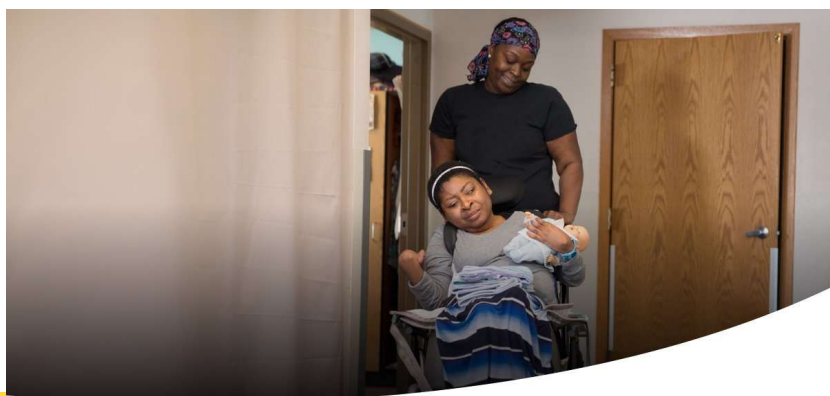


Strategic Plan 2025



March 28th, 2025

**Homeward
Bound**
Innovative & Life-enriching



About Homeward Bound, Inc.

Homeward Bound, Inc. (HBI) is a 52-year-old nonprofit 501(c)(3) organization serving individuals with a variety of abilities in 22 residential neighborhood settings across 10 diverse urban and rural metropolitan area communities. Our journey began in 1973 when parents and members of the community joined together to create individualized housing options. These homes were designed for children of all ethnic, racial, and religious backgrounds with a variety of physical and mental challenges. We have grown to become a regional leader in providing 24-hour specialized care, including nursing services, for individuals of all ages with disabilities in our ever-expanding traditional waiver homes, mid-medical homes, and high-medical home settings.

Homeward Bound follows a person-centered, active support approach to ensure that the individuals with disabilities we serve have a hand in directing their services and a voice concerning their future. We place no limits on what a person is capable of accomplishing. Every day, we work to empower those we serve and their families with resources to make informed decisions and control their own destinies.

We work to assist people to physically navigate and ensure accessibility so they can move about and be part of their community as a productive citizen. Everyone receiving services from Homeward Bound should be growing and developing their skills, making choices, and becoming interconnected within the community.

We believe that community interaction is central to a person's life. We are proud to be a part of the Twin Cities metropolitan community.

Our Mission

Homeward Bound provides innovative and life-enriching services for individuals with a variety of abilities.

Our Vision

Our vision is to ensure individuals with a variety of abilities enjoy full and dignified lives.

Our Values

Choice – Individuals with a variety of abilities must be free to make choices and to maximize their authority over their own lives.

Community – Individuals with a variety of abilities must participate and partner with a variety of resources and support systems to promote individual enrichment.

Inclusion – Individuals with a variety of abilities must be included as part of their community to the same extent as individuals without disabilities.

Integrity – Individuals with a variety of abilities must be served by service providers who are lawful, ethical, safe, and have quality business practices and service environments.

Our Guiding Principles

Teamwork – Services will be developed and overseen by a collaborative team of individuals, staff, families, and outside agencies.

Outcomes – Services will be implemented and measured according to a results-oriented approach to quality service and care, individual satisfaction, employee engagement, and business success.

About the Strategic Planning Process

Homeward Bound began a strategic planning process following the resolution of the unprecedented COVID-19 pandemic, the celebration of five decades of history serving the community, and a change in executive leadership.

Our process unfolded over a 10-month period, beginning in August 2024 with a corporate staff retreat and Board Executive Committee Planning Session. With the approval of an agreed-upon planning process by the Board of Directors in September 2024, the President and Chief Executive Officer (CEO) was directed to form a steering committee of key staff leaders and board members.

The steering committee hosted an extended session with the Board of Directors, where senior leaders updated board members on departmental initiatives, including current objectives, in order to gain important perspective on current operational targets.

Next, the steering committee determined the need to identify an external facilitator to assist in a future planning retreat. The CEO was directed to identify and interview potential candidates. Following the identification of a facilitator, the Executive Committee was introduced, and the CEO hosted an extended meeting with senior leaders to acclimate the facilitator to the organization.

The contracted facilitator and CEO met to plan details of a Strategic Planning Retreat, which the steering committee established would occur on February 21st, 2025.

A Strategic Plan document was drafted and shared with the full Board of Directors for feedback at their bimonthly meeting on March 27th, 2025. Following final edits, the 2025 Strategic Plan was formally approved by vote at the Board of Directors meeting on March 27th, 2025. The 2025 Strategic Plan will serve the organization as a strategic guide for innovation and excellence during the next three to five years.

Strategic Planning Timeline

Group	2024					2025					Notes
	August	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	
Corporate Team	Corporate Staff Retreat										Validation of vision, history, needs of org
Executive Committee of the Board	Executive Committee Planning Session										Process, format, skills, facilitator use
Full Board of Directors		Board Meeting									Approval of strategic plan, 2025
Senior Leaders w/CEO			Senior Leaders Meeting								Acclimate facilitator
Strat. Plan Committee				Strat. Plan Committee Meeting							Review the facilitator
CEO/Senior Leaders				CEO/Senior Leaders Meeting							Strat. Plan
Strategic Planning Retreat						Strategic Planning Retreat					Strat. Plan
Facilitator/CEO							Facilitator/CEO Meeting				Review the process
Executive Committee of the Board								Executive Committee Meeting			Approval of strategic plan
Full Board of Directors									Full Board Meeting		Review the process

Group	2024	2025	Notes
Corporate Team			Review the process
Executive Committee of the Board			Review the process
Full Board of Directors			Review the process
Senior Leaders w/CEO			Review the process
Strat. Plan Committee			Review the process
CEO/Senior Leaders			Review the process
Strategic Planning Retreat			Review the process
Facilitator/CEO			Review the process
Executive Committee of the Board			Review the process
Full Board of Directors			Review the process

HBI Strategic Priorities (2025)

HBI will be a regional leader in quality care excellence, response to community needs, and high fidelity to documentation standards.

- a. Our residents are happy, healthy, integrated, and actively supported in their community, as measured by stakeholder satisfaction surveys and HBI Quality Care Indicators
- b. We use data to meet growing community needs by developing and advancing our model of care
- c. All staff demonstrate a commitment to and mastery of documentation practices
 - Optimize functionality, workflows, and reporting within the medical record
 - Ensure documentation plays its role in mitigating risk
 - Ensure accountability to active support and service plan goals

HBI will share its mission-driven excellence through enhanced marketing and social media efforts focused on welcoming new residents, service customers, attracting and retaining top employees, donors, and committed volunteers.

- a. Make HBI a known brand regionally through external and internal marketing strategies
- b. Increase use of multimedia, social media engagement, lectures, trainings, speaker bureaus, podcasts, etc., to advance brand and mission
- c. Prove excellence of service through data-driven storytelling to both internal and external constituencies

HBI will pursue a prudent financial strategy to create budgetary margins, grow and leverage assets, and manage debt burden to ensure long-term stability for the organization.

- a. Direct any margins or surpluses back to innovation, growth, infrastructure development, and long-term savings
- b. Manage capital expenditures effectively
 - Conclude with fulfillment of loan payments on 14 homes in 2029
 - Leverage own assets to support growth where possible
 - Examine return on investment and cost models for growth that include both retrofit of existing homes vs. new builds
- c. Lobby government officials on funding and policy decisions that impact people with disabilities

HBI will explore pilot programs and new service lines that increase revenue streams, improve offerings to residents, and attract new customers.

- a. Examine viability and/or pilot training offerings to similarly situated organizations or individuals in some format
 - Add revenue streams where opportunities arise to do so
- b. Examine viability and/or pilot respite, camp, or travel service lines
 - New lines cannot be a loss leader
- c. Examine the viability of acquisition opportunities that arise, considering potential for increased impact

HBI will increase the quantity and quality of staff, balancing market demands, fiscal resources, and workforce availability.

- a. An emphasis on training and service excellence
- b. A focus on staff development, preparation for promotion, and retention tactics
- c. A commitment to staff recognition and competitive wages

HBI will pursue fundraising targets, expand supporters and donors, and increase philanthropic revenue for Homeward Bound, Inc. and Homeward Bound Foundation.

- a. Hire a dedicated development officer committed to the fundamentals of fundraising
- b. Pursue foundation support, donor advised funds, major gifts, planned giving, and estate giving
- c. Develop any needed capital campaign strategies and administer them

HBI will closely monitor its growing needs for program space, including facilities that support the current programming model of care, future growth opportunities, new service lines, partnerships, and corporate facilities.

- a. Group home needs
- b. Pilot programs and strategic partnerships
- c. Recreation and adaptive equipment

Thank You to Our Strategic Planning Team

Corporate and Foundation Board Members

*Kevin Rymanowski | Pat Hurley | Paul Chermak
Terry Severns-Williams | Ryan Sherwood | Wolfgang Greiner
Jan Moser | Jim Schaefer | Jack McClure
Talia Pletcher | Dave Mathias | Andrea Nelson
Dick Morris | Peggy Neale | Ross Brink | Dan Etzel*

Staff

*Rob Edwards | Theresa Bluhm | Lisa Fredericksen
Kristi Nordland | Kristine Morin | Serena Emerfoll | Grant Haley*

*Thank you to our external facilitator
Jon Ruzek*