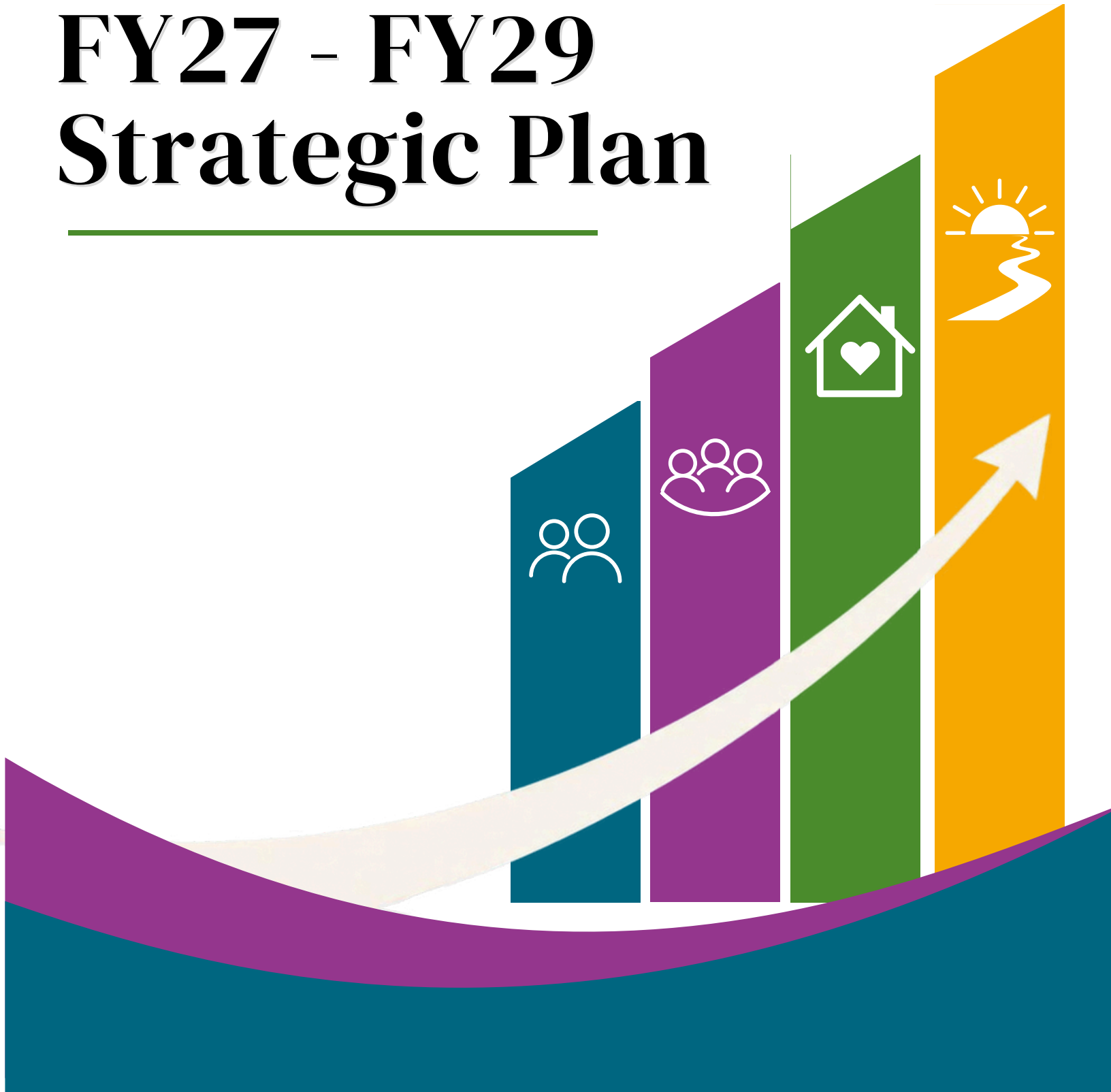
UCP seguin of Greater Chicago

Life without limits for people with disabilities™

FY27 - FY29 Strategic Plan



UCP seguin of Greater Chicago
Life without limits for people with disabilities™

The Plan At A Glance

This strategic plan translates UCP Seguin's Four Pillars of Excellence into 9 measurable goals and 25 strategic initiatives across 6 focus areas. The plan includes three-year 2026–2029 timelines and RACI assignments.

6	9	25
Focus Areas	Goals	Strategic Initiatives

OUR SIX FOCUS AREAS



Program Services

Deliver high-quality, person-centered services that advance choice, inclusion, and impact.

Goal 1



Organizational Development

Strengthen our people, culture, and systems to drive effectiveness and sustainability.

Goals 2–3



Finance & Funding

Ensure financial health through disciplined management and diversified, sustainable funding.

Goals 4–6



Advocacy and Marketing

Amplify our voice, build awareness, and engage partners to advance our mission.

Goal 7



Technology and Data Management

Technology and data will function as integrated systems across the organization, improving efficiency, information flow, and decision-making

Goal 8



Board

Strengthen board leadership, governance, and stewardship.

Goal 9

Our Commitment To People & Culture

Four Pillars of Excellence



Prioritize The People We Serve

Embrace Innovation & Unconventional Ideas

Foster Culture of Empowerment & Engagement

Invest In The Employee Experience

> I Want This To Be Everyone's Plan
>
> Joseph Mengoni,
> President/CEO

The Strategic Framework

Our plan is organized into three connected layers that bring clarity, accountability, and action to our mission.



North Star —

The guiding statement that describes success for each focus area by 2029.



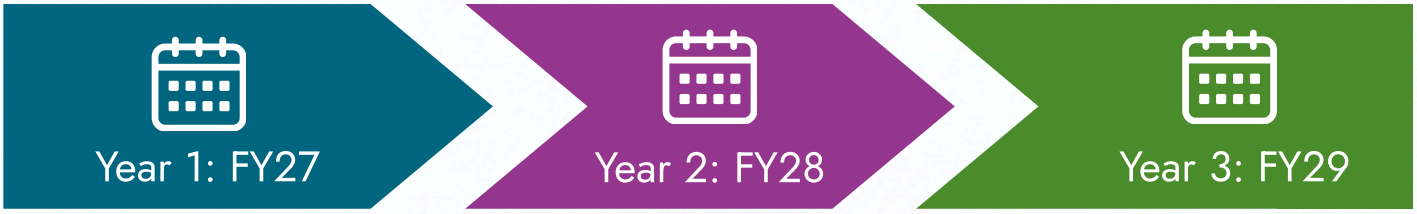
Goals —

The specific organizational outcomes we will achieve, with named executive owners.



Strategic Initiatives —

The concrete steps we will take, including timelines and RACI assignments. Initiatives may distinguish Current Needs from Future Needs.



This three-year horizon keeps our focus clear, our priorities aligned, and our progress measurable.

Goals & Ownership

Nine goals to advance our mission and strengthen impact for people with disabilities.

GOAL	GOAL STATEMENT	OWNER
1	Adopt a portfolio management approach to support resource allocation for current programs and strategic growth	Chief Program Officer — Adults
2	Implement a unified, coordinated training & development program	Chief Human Resources Officer
3	Ensure appropriate staffing to meet current and future needs	Chief Human Resources Officer
4	Develop and implement a structured approach to determining funding needs and allocation	Chief Financial & Operations Officer
5	Create a short- and long-term strategy to grow development funds in accordance with needs	Chief Advancement Officer
6	Improve clarity and accessibility of financial information for ease of use	Chief Financial & Operations Officer
7	Significantly increase external visibility and interest in the organization	Chief Policy, Research & Advocacy Officer
8	Improve use of technology to increase organizational efficiency and effectiveness	Chief Financial & Operations Officer
9	Increase Board engagement and effectiveness	Chairman of the Board of Directors

Program Services

Four Pillars Connection: Pillar 1 (Prioritize People Served) + Pillar 2 (Embrace Innovation)

NORTH STAR

Program services will be managed as a cohesive portfolio, enabling informed decision-making, efficient resource allocation, and intentional growth aligned to the organization's mission and impact — with data-driven services that are scalable, sustainable, and recognized as the industry standard.

GOAL 1

Adopt a portfolio management approach to support resource allocation for current programs and strategic growth.

STRATEGIC INITIATIVES

1. Develop a structured portfolio management model (mission alignment, financial margin, regulatory compliance, resource needs, magnitude of impact).

   TIMELINE: YEAR 1

2. Systematically incorporate the model into business processes to guide overall decisions and plans for growth.

   TIMELINE: YEAR 2

3. Leverage the portfolio management model to identify growth opportunities that best serve the mission.

   TIMELINE: YEAR 3

Organizational Development

Four Pillars Connection: Pillar 3 (Culture of Empowerment) + Pillar 4 (Invest in Employees)

NORTH STAR

The organization will be staffed, developed, and connected through coordinated systems that build talent, strengthen retention, and improve alignment across teams to support current and future needs — driving sustainable growth and setting the industry standard for human services for IDD individuals.

GOAL 2

Implement a unified, coordinated training & development program.

STRATEGIC INITIATIVES

1. Inventory current training needs, resources, and initiatives (onboarding, cross-functional, technology, professional development, SOPs).

   TIMELINE: YEAR 1

2. Develop, coordinate, and implementtraining programs.

   TIMELINE: YEAR 1 (CURRENT NEEDS) → YEAR 2 (FUTURE NEEDS)

3. Implement a centralized, org-wide Learning Management System tracking mandatory certifications and role-specific training.

   TIMELINE: YEAR 3

GOAL 3

Ensure appropriate staffing to meet current and future needs.

STRATEGIC INITIATIVES

1. Assess both corporate and participant staffing levels in view of current and future needs.

   TIMELINE: YEAR 1 (CURRENT NEEDS) → YEAR 2 (FUTURE NEEDS)

2. Identify opportunities to strengthen the organization through skill assessment and reassignments.

   TIMELINE: YEAR 1 (CURRENT NEEDS) → YEAR 2 (FUTURE NEEDS)

3. Develop a comprehensive succession plan.

   TIMELINE: YEAR 1 (CURRENT NEEDS) → YEAR 2 (FUTURE NEEDS)

Finance & Funding

Four Pillars Connection: Pillar 3 (Transparency Empowers Decisions) + Pillar 2 (Predictive Financial Management)

NORTH STAR

Financial management will ensure long-term mission sustainability, predictive forecasting, and the disciplined allocation of capital toward high-impact growth.

GOAL 4

Develop and implement a structured approach for determining funding needs and allocation.

STRATEGIC INITIATIVES

1. Create a process to identify and prioritize funding needs in accordance with predetermined criteria set by management and approved by the Board.

   TIMELINE: YEAR 1

2. Develop a process that updates regularly (monthly/quarterly) to predict funding shortfalls based on spend and reimbursement lag.

   TIMELINE: YEARS 1 - 2

GOAL 5

Create a short and long-term strategy to grow development funds in accordance with needs.

STRATEGIC INITIATIVES

1. Explore and identify alternative revenue sources.

   TIMELINE: YEAR 1

2. Develop a multi-year Capital Campaign tied to specific areas (technology, facilities, etc).

   TIMELINE: YEAR 1

3. Develop relationship-based fundraising programs focused on high-net-worth individuals and private foundations.

   TIMELINE: YEAR 1

GOAL 6

Improve clarity and accessibility of financial information for ease of use.

STRATEGIC INITIATIVE

1. Assess financial-information needs for stakeholders and each program, and develop reports and resources to meet those needs.

   TIMELINE: YEAR 1 (CURRENT NEEDS) → YEAR 2 (FUTURE NEEDS)

Advocacy & Marketing

Four Pillars Connection: Pillar 1 (Mission Sustainability) + Pillar 2 (Bold, Evidence-Based Advocacy)

NORTH STAR

Becomes the industry standard for the IDD community, everaging evidence-based advocacy and strategic philanthropy to secure the capital required to pioneer innovative care and achieve long-term financial independence.

GOAL 7

Significantly increase external visibility and interest in the organization.

STRATEGIC INITIATIVES

1. Develop marketing goals aligned to development and growth targets (awareness, impressions, followers, solicitation responses).

   TIMELINE: YEAR 1

2. Assess current capability and build capacity to execute marketing goals.

   TIMELINE: YEAR 1 (CURRENT NEEDS) → YEAR 2 (FUTURE NEEDS)

3. Establish the organization as a thought leader and regional authority in IDD services.

   TIMELINE: YEARS 1 - 3

4. Develop a plan for increased and enhanced advocacy efforts.

   TIMELINE: YEAR 1

5. Move toward evidence-nased advocacy - prove cost savings to the State through continued investment.

   TIMELINE: YEAR 2

Technology & Data Management

Four Pillars Connection: Pillar 2 (Technology as Innovation Backbone) + Pillar 1 (Empowering Staff to Serve People Better)

NORTH STAR

Technology and data will function as integrated systems across the organization, improving efficiency, information flow, and decision-making.

GOAL 8

Improve use of technology to increase organizational efficiency and effectiveness.

STRATEGIC INITIATIVES

1. Develop a comprehensive IT and data management strategy (needs assessment, information flow audit).

   TIMELINE: YEAR 1

2. Establish an agency-wide Unified Data Warehouse connecting Finance, HR, and Program Services.

   TIMELINE: YEAR 2

3. Conduct an assessment of participant and staff technology needs, and develop an implementation plan.

   TIMELINE: YEAR 2

Board

Four Pillars Connection: Pillar 3 (Cultural Stewardship at the Governance Level) + Pillar 1 (Accountability to People Served)

NORTH STAR

The Board's role will evolve to emphasize stronger engagement, clear accountability, and effective performance in governance, fundraising, and organizational oversight.

GOAL 9

Increase Board engagement and effectiviness.

STRATEGIC INITIATIVES

1. Clarify roles, expectations, and fundraising responsibilities for all Board members.

   TIMELINE: YEAR 1

2. Develop a plan for Board composition, recruitment, and engagement.

   TIMELINE: YEAR 1

"Growth that does not create a better experience for the people we serve is not the right growth."

- Joseph Mengoni
President/CEO