



OUR FUTURE.
OUR STORY.
OUR PRACTICE.



2026-2029 Strategic Plan



Introduction

The Association House Strategic Plan (2026–2029) weaves input from people from across the organization. This included leaders, staff, board members, community members, clients, donors, and outside partners. A special planning group led the work and made sure that many voices were heard and that participants remained centered.

Mission

Association House's mission is to advance each person's full participation in the life of their family, community, and society.

Values

The House is a vibrant, inclusive home for people on a journey to live their fullest life. Our core values stand as a firm foundation for our work.

- **Integrity:** being ethical and demonstrating commitment to mission, values and philosophy.
- **Excellence:** using skills and abilities to consistently increase effectiveness.
- **Respect:** recognizing and affirming the unique value of each individual, group, and culture.
- **Leadership:** taking every opportunity to develop one's capacity for decision-making, individual initiative, and quality of life choices.
- **Education:** enhancing the potential of individuals and communities.

Vision

Association House envisions a more inclusive society: one where each person is fully participating – economically, civically, socially and culturally – in the life of their family, community and society.

Diversity, Equity, & Inclusion

Association House has long been dedicated to diversity, equity, and inclusion. We openly and proudly support BIPOC, LGBTQ+, and other marginalized individuals and communities — both in the areas we serve and beyond. We recognize that nonprofit and social service organizations are not protected from deep-rooted systems of oppression, racism, anti-Blackness, ableism, xenophobia, and homophobia that show up in all parts of daily life.

To stop reinforcing harmful stereotypes against marginalized people and communities, we must regularly examine ourselves and our practices, and work to address our own hidden biases. To do this, we work within our organization to provide anti-bias training at every level of Association House. We make consistent efforts to hire and keep a diverse group of employees and participants. We support The House Committee — a group of staff members focused on building cultural awareness, strengthening inclusion within our organization, and growing social awareness. And most importantly, we are committed to changing our culture for the better. These are commitments we stand behind today, tomorrow, and always.



Our Strategic Plan Pillars

Together, these three pillars provide a roadmap for strengthening our organization and deepening the care we provide to the community. Each pillar reflects our commitment to making thoughtful decisions, using data to drive meaningful change, and ensuring every participant can access the support they need. While each pillar has a distinct focus, they work together to create a stronger, more sustainable Association House.



**Our Future:
Grow Smart,
Stay Strong**



**Our Story &
Our Data:
Measuring and
Sharing Results**



**Our Practice:
A Hub for
Community
and Care**

Continued Guiding Principle: Focus on Participants & Community



Guided by our commitment to putting participants and community first, these priorities focus on strengthening the systems that make our mission possible. By investing in organizational sustainability, measuring our impact, and deepening connections to care, we can better meet today's needs while building a stronger future for those we serve.



Our Future

A clear plan for making decisions will ensure that the voices of the people we serve always matter. It will help our organization run more smoothly. And, it will ensure our programs continue to reflect current community needs. Having steady funding and backup plans will make sure that the services people count on move forward. When our systems work well, everything runs more smoothly. Our staff can focus on what matters most: delivering services that are high quality, fast, and dependable.

Our Story

Better and more reliable data is key to understanding the effectiveness of Association House programs. By tracking people's progress over time, we can see what is working, find gaps in our services, and make changes when needs shift. The more people know about Association House, the easier it will be for those who need help to find us. And when we can showcase the difference we are making across many programs at once, it sends a powerful message to funders and the people we serve. That message? Association House will meet you where you are and support you every step of the way.



Our Practice

People's needs do not always fit into only one box. Needs like housing, health, employment, and education are often connected to each other. The Connected Care model is built with that in mind. With a clearer system for connecting people to different services, anyone who walks through Association House's doors will be able to get all the help they need in one place. Our spaces are designed to be safe and welcoming, and we regularly check to make sure they feel that way. This helps people feel comfortable and ready to take full advantage of what Association House offers. When our partnerships with other organizations are working well, the people we serve benefit too. They get access to more resources, and the whole community receives stronger support.



Our Future: Grow Smart, Stay Strong

Association House has been here for more than 125 years, and we plan to keep growing stronger. Funding is changing, the needs of our community are shifting, and our staff and resources are being stretched. To meet these challenges, Association House will put together a **clear plan to help our leaders make smart decisions** about our programs. Decisions like when to grow, when to slow down, and when to try something new. This plan will also connect to a fiscal strategy that ensures we are not relying too heavily on any one source of funding. Instead, we will spread our funding across different sources with backup plans ready, just in case.

We will also keep **improving the tools and support** that help our staff do their best work. This includes technology, facilities/space, and opportunities to learn and grow on the job. All of these steps work together to help Association House stay healthy and strong for many years to come.





Our Future: Grow Smart, Stay Strong

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| Goal 1: | By early 2027, Association House will create a clear guide for programmatic decision making. |
| Goal 2: | By 2028, Association House will ensure its funding plan matches its broader organizational goals. |
| Goal 3: | By 2027, Association House will have backup programmatic and fiscal plans in place and ready to address potential funding changes. |
| Goal 4: | Over the next three years, Association House will improve its internal systems to better support our mission. |
| Goal 5: | By 2028, Association House will actively support its staff and communicate intentionally about its commitment to retaining great people for the long term. |

Goal 1: By early 2027, Association House will create a clear guide for programmatic decision making.

Strategies and Tactics

1. Look at the guidelines currently used to make decisions and review the data we already have.
2. Determine what new information or guidelines might be needed for the decision-making guide.
3. Decide where and when the decision-making guide will be used.
4. Decide who will oversee building the decision-making guide.
5. Plan for sharing the decision-making guide with staff and putting it into action.
6. Connect better data collection from Priority Two into the decision-making guide, so it can help us make smarter choices over time.

Goal 2: By 2028, Association House will ensure its funding plan matches its broader organizational goals.

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Strategies and Tactics

1. Continue working to fundraise from various places. Not just by identifying new types of funding, but also by growing each type and relying less on any one single source.
 - a. Cultivate more donations from individual donors.
 - b. Go after larger foundation grants.
 - c. Increase Association House planned gifts.
 - d. Increase Board member involvement in fundraising, including outreach within their networks, with clear expectations and accountability.
 - e. Build a stronger plan for improving support from businesses and corporations.
2. Continue investing in the tools, staff, and systems that help us raise money and grow our fundraising efforts.

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Strategies and Tactics

1. By the end of 2026, Association House will create backup plan scenarios for all programs. This will help us stay prepared and ready to adjust if there are changes.
 - a. Include these backup plans in the Program Decision Guide and annual budget and financial documents. This will help to make smart proactive and intentional decisions before problems arise.
2. By 2027, Association House will have backup funding plans in place for all programs, with special adjustments made for programs that need them.
 - a. Evaluate the risk of each program's funding situation— and develop a plan B and C.
 - b. Ensure Association House is in a strong position to access new funding quickly when it becomes available.
 - c. Find programs where losing funding could cause larger problems in other areas like staffing and determine what steps could be taken to reduce that impact.
3. Association House will build and strengthen partnerships in alignment with backup plans. This connects to the work on Partnerships in Priority 3.

Goal 4: Over the next three years, Association House will improve its internal systems to better support our mission.

Goal 5: By 2028, Association House will actively support its staff and communicate intentionally about its commitment to retaining great people for the long term.

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Goal 4: Over the next three years, Association House will improve its internal systems to better support our mission.

Strategies and Tactics

1. Create a plan for making the best use of Association House's buildings and spaces.
2. Use technology to help staff work more efficiently and reduce costs.
 - a. Keep our systems safe from cybersecurity threats.
 - b. Improve the approach to track and manage client cases.
 - c. Explore opportunities to use artificial intelligence (AI) to help us work smarter.
 - d. Upgrade our client management software to improve operations across all programs and departments.
3. Create clear and consistent day-to-day processes, and improve our HR systems.
4. Grow the accounting team as our programs grow, to ensure capacity for vouchering and payments.
5. Identify ways to reduce costs and improve how to attract and retain great staff.

Goal 5: By 2028, Association House will actively support its staff and communicate intentionally about its commitment to retaining great people for the long term.

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Goal 3: By 2027, Association House will have backup programmatic and fiscal plans in place and ready to address potential funding changes.

Goal 4: Over the next three years, Association House will improve its internal systems to better support our mission.

Goal 5: By 2028, Association House will actively support its staff and communicate intentionally about its commitment to retaining great people for the long term.

Strategies and Tactics

1. Continue to ensure that staff skills, growth opportunities, and hiring are aligned to our larger goals and priorities. Intentionally focus on newer staff who have been with us for two years or less.
2. Build a plan for retaining great staff that includes mentoring, training goals, learning from other teams, and opportunities to attend outside events and training.
 - a. Make "mission moments" a regular part of staff meetings, and a specific time to celebrate real examples of the difference staff are making.
 - b. Start a mentoring program where experienced staff guide newer staff who show strong potential.
 - c. Create a "buddy" system that pairs new hires with long-term staff, so new employees have someone to ask questions to and learn from about the organization's history and culture.
 - d. Set fair and realistic workload expectations and actively work to prevent staff burnout.
 - e. Train managers and hold them accountable for creating spaces where staff feel safe speaking up about concerns.
3. Determine what capabilities are needed for key roles and determine whether the current staff possess them.
 - a. Create growth plans to fill any skills and capability gaps, and determine if any roles need new or different skills or new staff.
4. Use the yearly staff survey to hear directly from employees about their experience and what would help them stay with Association House.
 - a. Each year, create a simple action plan with two to three clear steps based on the feedback received.
5. Build a plan for recognizing and rewarding staff based on how long they have been with Association House.



Our Story & Our Data: Measuring and Sharing Results

For Association House to keep growing and accessing the funding it needs, we have to be able to clearly explain what we do, and show proof that it works. The goal is to have one clear message: **using facts and data to show the real difference** we make in people's lives across all programs. When we turn data into real stories and meaning, it helps people understand how our work connects to bigger changes in society. And, it shows funders, partners, and the community why our work matters.

To do this, we need better tools for collecting and tracking information. We need **real-time data, long-term tracking, and ways to measure results** across all programs. We also need to build a stronger brand and a clear and consistent way of presenting who we are, along with a media plan and a louder public voice. This will help more people understand who Association House is and the impact we are making. Working with researchers and partnering with other organizations can help us reach even more people. And together, we can push for changes in laws and policies that help the communities we serve.





Our Story & Our Data: Measuring and Sharing Results

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| Goal 1: | By 2028, Association House will use real stories of participant's changed lives to attract funding and new participants. |
| Goal 2: | By 2028, Association House staff will have access to current and long-term data on clients, programs, and results to help facilitate decision making and better tell our story. |
| Goal 3: | By 2028, Association House staff will feel confident representing the entire organization, not just their own program or department. |

Goal 1: By 2028, Association House will use real stories of how participant's lives have changed to attract funding and new participants.

Strategies and Tactics

1. Expand our storytelling beyond individual stories to show the bigger picture of what Association House does and why. Include Association House's economic impact on our neighborhood, county, state, and beyond.
 - a. Build the tools and systems needed to stay in touch with and track clients over time, and set clear goals to measure our progress.
 - b. Make collecting success stories a regular habit across all teams and departments.
2. Bring staff from different teams together to map the full journey a person takes through Association House. Use that map to help shape and tell our overall story of impact.

Goal 2: By 2028, Association House staff will have access to current and long-term data on clients, programs, and results to help facilitate decision making and better tell our story.

Goal 3: By 2028, Association House staff will feel confident representing the entire organization, not just their own program or department.

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Goal 2: By 2028, Association House staff will have access to current and long-term data on clients, programs, and results to help facilitate decision making and better tell our story.

Strategies and Tactics

1. Create a plan to make our data stronger and more reliable, both for staff inside the organization and for outside audiences like funders and partners.
 - a. Evaluate the technology already in use, like Salesforce and electronic health record systems, and determine what new technology is needed to carry out the plan.
 - b. Use a step-by-step approach to guide future decisions about technology and operational systems.
 - c. By 2027, identify the key data to track across all of our programs, and connect them to bigger changes happening in society.
2. Figure out how to use data, measurements, and results to help build and support our long-term impact story.
 - a. Create a plan for collecting long-term data to understand the lasting difference our programs make. Create touchpoints after one, three, five, and 10 years, for example.

Goal 3: By 2028, Association House staff will feel confident representing the entire organization, not just their own program or department.

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Strategies and Tactics

1. Partner with at least one new research organization to grow Association House's reputation, while also working toward important policy goals.
 - a. Work together to publish research and findings.
 - b. Share data and resources with research partners.
2. Participate in more local events with staff and participants wearing Association House branded clothing to help more people recognize and know us.
3. By early 2028, Association House will re-launch a brand toolkit and a set of clear guidelines for how Association House presents itself to the public.
 - a. Set clear goals to measure our visibility. Examples may include how often Association House is mentioned in the media, how many speaking invitations received, and the level of engagement on social media.
 - b. Use the brand toolkit to guide signature events, partnerships, and coalitions, and to help our executive leaders become more visible and well-known in the community.



Our Practice: A Hub for Community and Care

Association House has always been more than just a place that offers programs; it is an important part of the community. We will keep **facilitating strong teamwork** inside our organization and **strong relationships** outside of it. Through a new effort called **Connected Care**, our different departments will work more closely together. This means that the skills, services, and connections we have will be linked, so people who need more than one type of support can access those services more easily.

We will improve the way we share information and refer people from one part of Association House to another. We'll learn from what is working across our different departments. **Keeping people safe** is a big priority. This means making sure our spaces feel safe in every way: physically, emotionally, and digitally for both the people we serve and our staff.

We will identify strategic partnerships with other organizations. We'll use clear guidelines to make sure each partnership fills a tangible gap. This will help us reach more people without spreading ourselves too thin. We'll avoid duplicative efforts and build lasting strength over time.





Our Practice: A Hub for Community and Care

Goal 1: By 2028, Association House will have launched a new Connected Care initiative.

Goal 2: By 2028, Association House will create a new Safety First framework enabling improved participant and staff experience.

Goal 3: By the end of 2028, Association House will carefully review, prioritize, and grow its partnerships where needed.

Goal 1: By 2028, Association House will have launched a new Connected Care initiative.

Connected Care is a new idea that creates a path toward better integration across departments resulting in a more complete experience for the people Association House serves.

Strategies and Tactics

1. Create regular educational opportunities across the organization so that staff can learn about each program and department, helping build knowledge and stronger connections between teams.
 - a. Include this learning in new staff orientation.
 - b. Keep this learning going on an ongoing basis.
2. Define what success looks like for Connected Care, including clear goals and the outcomes it will achieve.
3. Identify the challenges that need to be solved, such as technology or funding issues, before fully building the Connected Care model.
4. Build a step-by-step plan for launching the initiative.
 - a. Decide who will lead Connected Care and where it will be managed within the organization.
 - b. Look at teamwork models that already exist at Association House and think about how to apply them more broadly across the whole organization.
 - c. Create a central intake process or an updated internal referral system to make sure people are connected to all the services inside Association House that could help them.
 - d. Develop a clear communication plan for introducing Connected Care to staff.
5. Use new investments in technology and staffing to improve how to manage and report data, and better connect our client management systems across programs and departments.
6. Look for opportunities to increase referrals and teamwork between departments, reducing the need to spend money outside the organization and building stronger financial sustainability through internal partnerships.

Goal 2: By 2028, Association House will create a new Safety First framework enabling improved participant and staff experience.

Goal 3: By the end of 2028, Association House will carefully review, prioritize, and grow its partnerships where needed.

Goal 1: By 2028, Association House will have launched a new Connected Care initiative.

Goal 2: By 2028, Association House will create a new Safety First framework enabling improved participant and staff experience.

Strategies and Tactics

1. Create a system for regularly checking for and evaluating risks, including physical safety, the environment, emotional wellbeing, and online safety.
 - a. Build on the safety practices Association House already has in place, like those used by HR.
 - b. Reflect Association House's values around safety and security.
 - c. Apply to both the administrative side and the program side of the organization.
 - d. Connect with trauma-informed approaches already used in HR, such as corrective actions, exit surveys, and fair processes.
2. Create a standard tool that can be used to assess risk across the organization.
3. Set up clear and easy-to-follow safety rules for our physical spaces and environment.
4. Create a safety oversight group made up of staff from different departments to work together on risk and safety issues.
5. Regularly check in with staff and participants to see how safe and secure they feel at Association House.
 - a. Establish a starting point to measure how safe people feel before the new framework launches.
 - b. Continue to measure and check in on safety after the Safety First framework is up and running.
 - c. Create a dedicated safety survey that is separate from the regular staff survey. The survey will use clear language, including asking people what safety means to them personally.
 - d. Create a communication plan to share the results of the safety survey with staff and participants, and explain how any concerns will be addressed.

Goal 3: By the end of 2028, Association House will carefully review, prioritize, and grow its partnerships where needed.

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Goal 3: By the end of 2028, Association House will carefully review, prioritize, and grow its partnerships where needed.

Strategies and Tactics

1. Create a full list of all current partnerships, organized by department, facilitating easier use of partnership resources and avoiding work duplication.
2. Review current partnerships.
 - a. Evaluate how well each partnership is working, how well Association House communicates with each partner, and the strength of each partner relationship.
 - b. Identify gaps in services that the community needs but that Association House or its partners are not currently providing.
3. Partner with other organizations to share locations and create "one-stop-shop" services, where people can access multiple types of help in one place. These partnerships should improve the quality and range of services, be culturally responsive, fill gaps in services, and help Association House reach more people.
4. Plan at least two events each year that are co-hosted with other nonprofit partners, either local, regional, or national. These events will address important community needs, raise awareness of Association House, and advocate for the people Association House serves.

Thank You

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