



Strategic Plan

2025 2026 2027

Updated Jan. 2025

WHO WE ARE &  
WHERE WE ARE

# MISSION & VISION

## Mission

To support people with disabilities as they experience life with unlimited possibilities.

## Vision

We are the premier provider of supports and services for people with disabilities, signifying quality, innovation, and person-centered principles.

# KEY PROGRAMS & SERVICES

- Community Living
- Community Support Options
- Employment Services
- “My Day” Day Habilitation
- Recreation & Sports
- Nursing & Health Services
- Applied Behavior Analysis
- CDS & In-Home (Added w/ NWMO)

# GROWTH DURING THE PAST DECADE

<b>LIFE UNLIMITED GROWTH SUMMARY - REPORTED BY 990s</b>												
IM / LU	\$ 2,012.00	\$ 2,013.00	\$ 2,014.00	\$ 2,015.00	\$ 2,016.00	\$ 2,017.00	\$ 2,018.00	\$ 2,019.00	\$ 2,020.00	\$ 2,021.00	\$ 2,022.00	\$ 2,023.00
DMH Rate Changes	\$ 0.02	\$ -	\$ 0.03	\$ -	\$ 0.03	2% or .46 per/hr	\$ (0.03)					Estimated from Financials
Starting DSP Wage	Unknown	Unknown	\$ 9.20	\$ 9.50	\$ 10.00	\$ 11.00	\$ 11.00	\$ 12.00	\$ 12.00	\$14.00-\$15.00	\$16.00-\$17.00	
Employees		\$ 117.00	\$ 131.00	\$ 172.00	\$ 216.00	\$ 617.00	\$ 458.00	\$ 586.00	\$ 551.00	\$ 479.00		
Contributions & Grants	\$ 299,169.00	\$ 294,645.00	\$ 261,752.00	\$ 252,689.00	\$ 2,097,013.00	\$ 322,968.00	\$ 923,787.00	\$ 442,706.00	\$ 3,585,445.00	\$ 950,839.00	\$ 680,723.95	
Program Service Revenue	\$ 3,163,329.00	\$ 3,837,307.00	\$ 4,070,204.00	\$ 4,765,906.00	\$ 6,445,269.00	\$ 12,646,958.00	\$ 15,361,847.00	\$ 18,188,189.00	\$ 16,814,925.00	\$ 19,488,885.00	\$ 25,334,309.55	
Total Revenue	\$ 3,482,175.00	\$ 4,157,454.00	\$ 4,351,507.00	\$ 5,036,822.00	\$ 8,760,201.00	\$ 13,189,441.00	\$ 16,492,470.00	\$ 18,820,473.00	\$ 21,009,281.00	\$ 20,875,349.00	\$ 26,552,797.50	
Revenue Less Expenses	\$ 28,250.00	\$ 64,285.00	\$ 194,745.00	\$ 433,036.00	\$ 3,045,687.00	\$ 254,689.00	\$ 945,242.00	\$ 1,124,064.00	\$ 2,182,973.00	\$ 1,153,215.00	\$ 3,725,494.22	
Net Assests	\$ 1,872,288.00	\$ 1,943,699.00	\$ 2,139,164.00	\$ 2,572,200.00	\$ 7,107,365.00	\$ 7,363,609.00	\$ 8,745,447.00	\$ 9,876,938.00	\$ 12,125,969.00	\$ 13,158,170.00	\$ 16,883,664.22	
					MERGING...							
CCI	\$ 2,012.00	\$ 2,013.00	\$ 2,014.00	\$ 2,015.00	\$ 2,016.00	\$ 2,017.00	\$ 2,018.00	\$ 2,019.00	\$ 2,020.00	\$ 2,021.00	\$ 2,022.00	\$ 2,023.00
Starting DSP Wage			\$ 7.65	\$ 7.65	\$ 10.00							
Employees			\$ 199.00	\$ 176.00	\$ 175.00	MERGED						
Contributions & Grants		\$ 1,070,362.00	\$ 1,065,197.00	\$ 1,204,414.00	\$ 133,482.00							
Program Service Revenue		\$ 5,056,108.00	\$ 4,784,006.00	\$ 4,489,616.00	\$ 5,936,385.00							
Total Revenue		\$ 6,156,575.00	\$ 5,905,368.00	\$ 5,835,826.00	\$ 6,105,963.00							
Revenue Less Expenses		\$ 92,271.00	\$ (78,556.00)	\$ 103,102.00	\$ 124,314.00							
Net Assests		\$ 1,327,703.00	\$ 1,249,147.00	\$ 1,352,622.00	\$ -							
OOI	\$ 2,012.00	\$ 2,013.00	\$ 2,014.00	\$ 2,015.00	\$ 2,016.00	\$ 2,017.00	\$ 2,018.00	\$ 2,019.00	\$ 2,020.00	\$ 2,021.00	\$ 2,022.00	\$ 2,023.00
Starting DSP Wage						\$ 11.00	MERGING...	MERGED				
Employees				\$ 169.00	\$ 143.00	\$ 137.00	\$ 130.00					
Contributions & Grants			\$ 271,062.00	\$ 246,642.00	\$ 238,285.00	\$ 338,150.00	\$ 110,503.00					
Program Service Revenue			\$ 4,727,455.00	\$ 4,477,040.00	\$ 4,650,683.00	\$ 4,151,664.00	\$ 2,000,282.00					
Total Revenue			\$ 5,032,646.00	\$ 4,707,159.00	\$ 4,886,647.00	\$ 4,472,454.00	\$ 2,096,055.00					
Revenue Less Expenses			\$ (153,529.00)	\$ (218,722.00)	\$ (125,312.00)	\$ (110,245.00)	\$ (275,787.00)					
Net Assests			\$ 975,888.00	\$ 757,166.00	\$ 631,854.00	\$ 521,609.00	\$ -					
<b>Total Net Assets</b>	<b>\$ 1,872,288.00</b>	<b>\$ 3,271,402.00</b>	<b>\$ 4,364,199.00</b>	<b>\$ 4,681,988.00</b>	<b>\$ 7,739,219.00</b>	<b>\$ 7,885,218.00</b>	<b>\$ 8,745,447.00</b>	<b>\$ 9,876,938.00</b>	<b>\$ 12,125,969.00</b>		<b>\$ 16,883,664.22</b>	



# SWOT ANALYSIS

# STRENGTHS

- Life Unlimited received received NO recommendations on our last CARF survey. CARF Survey can be found on the Board Portal
  - This is accomplishment achieved by only 3% of CARF surveys. (CARF Survey pg. 10).
  - CARF surveys over 9,000 providers with over 30,000 locations and over 65,000 programs and services. (We received 29 detailed areas of strength on our last CARF survey)
- We are a Provider of Choice
- We are an Employer of Choice
- Exceptional Programs & Services
- Strong Financial Position that has been developed over the last 10 Years
- Exceptional Innovative Leadership throughout the Organization
- Strategic Planning Process that Involves all Programs/Services and Resource Departments
- Significant Strategic Growth over the last 10 Years that has positions LU to be a Leaders in Missouri
- Leadership over the last 10 years in the State Association (Starling)
- Ability to Raise Funds and a Strong Network of Donors
- Beautiful Homes that are Accessible
- A Large fleet of Vehicles (88)
- Low Openings Strong Resource Departments
  - (Property Management, External Relations, Human Resources, Finance, IT, Training, Recruiting, Business Analytics, Quality Assurance, Maintenance)
- Large Enough to Benefit from Economies of Scale
- Low Turnover Compared to Competitors

# WEAKNESSES

- With 72+ locations good communication is a challenge
- Our pay-rates are lower than ideal because they are dependent on rates that are decided annually by the state legislators. Therefore; there is a high turnover rate in our industry
- Life Unlimited does not have strong brand recognition throughout Kansas City
- Housing Costs have stagnated growth for our Community Living services
- Quality Assurance Program is in process, not completed

# OPPORTUNITIES

- Growth in all program areas is needed and we have the infrastructure throughout our leadership and resource departments to support continued growth
- Growth of My Day is our largest opportunity to grow needed programs that provide a high financial rate of return and are a resource for other services
- Business Analytics Maturity
- Innovation with Microsoft technology and remote supports
- Development of alternate funding streams and fundraising
- As a leader in the state of Missouri we have the opportunity for continued mergers and acquisitions
- With the addition of NWMO we now provide support to people with disabilities other than IDD
- Our “Trails Neighborhood” will be an model for future exceptional affordable housing projects

# THREATS

- Higher rates are positive, but also increase competitors to Missouri IDD services
- Possible Future DDRB Funding Decrease
- Possible Future State Budget Decrease
- Employee Shortage
- Pandemic or Other Unforeseen Emergency
- Adverse Investigation Findings
- Managed Care Implementation
- Waivers on Hold
- Constant Legislative Turnover with unpredictable Support

# TARGET AUDIANCE

- Individuals who can benefit from our services
- People who make Recommendations for Services (Families and Friends, Guardian, Public Administrators, Service Coordinators)
- The broader community who could partner with us as donors, volunteers and disability advocates

# STRATEGIC OUTCOMES

Our STRATEGIC OUTCOMES are our indicators that we are moving towards our vision and accomplishing our mission.

# STRATEGIC OBJECTIVES

## **I. We are a Provider of Choice**

We provide the highest quality services and programs to support individuals with disabilities.

## **II. We are an Employer of Choice**

We have the highest quality team members and leadership that can meet the changing needs of our dynamic organization.

## **III. Our Board of Directors is a High-Performing Board**

**Our Board Members are engaged with the organization and our mission**

## **IV. We are Financially Strong**

We have long-term sustainability and the financial ability to handle unforeseen needs and opportunities.

## **V. We are a Growing, Dynamic and Innovative Organization**

We are always seeking opportunities for improvement, growth and ways to increase our advocacy for individuals with disabilities and their families.

# MEASUREMENTS

## EXTERNAL MEASUREMENTS

- CARF Accreditation
- Annual Stakeholder Survey
- Annual Employee Engagement Survey
- Annual Audits
- Value Based Payment Goals Attained
- Various DMH Program & HUD Audits

## INTERNAL MEASUREMENTS

- Social Determinants of Health Metrics
- Quality Performance Report (QPR)
- Monthly Financials

# WE ARE A PROVIDER OF CHOICE

We provide the highest quality services and programs to support individuals with disabilities

- Beyond Feedback Annual Stakeholder Surveys
  - At Least 5% Higher than Benchmarks
- Continual Referrals
  - We receive a minimum average of 5 referrals per month for new services
- Growing Programs
  - Each program hits it's specific growth goals for the year
- Successful CARF Surveys
- Exceptional Brand Recognition
  - The KC Community Recognizes the Life Unlimited Name as a provider of Disability Services
- Our QA Program is data driven and gives timely feedback to ensure we are continually improving and providing the best evolving care possible. Our QA program is based on national benchmarks of the Social Determinants of Health

# WE ARE AN EMPLOYER OF CHOICE

We have the highest quality team members and leadership that can meet the changing needs of our dynamic organization

- Beyond Feedback Annual Employee Engagement Survey
  - At Least 5% Higher than Benchmarks
- Lower Turnover Rate than Competitors
  - At Least 5% Lower than Benchmarks
- Engaged Team Members Who Produce Quality Programs
  - Annual Program Goals are Accomplished
- Ability to Recruit Team Members who are Leaders in their Areas of Expertise
  - Continue to Hire Exceptional Leaders who are Experts in their field
- Our pay/benefits for our team members are better than our competitors
  - We pay market rates for all positions and have exceptional benefits that show we value our team members and their lives

# RESOURCE TEAMS - CAPACITY BUILDING FOCUS 2024 & 2025

- External Relations (Fund Development, Legislative Advocacy & Marketing/PR)
- Employee Engagement (Human Resources, Recruiting & Training)
- Finance & Financial Analytics
- Internal Systems (Information Technology, Quality Assurance & Business Analytics)
- Unlimited Properties (Housing, Property Management & Transportation)

# OUR BOARD OF DIRECTORS IS A HIGH-PERFORMING BOARD

- The Board of Directors sets annual goals for the board and conducts annual board performance evaluations
- The Board of Directors assess the needs of the board annually and recruits board members accordingly
- Board Members are active on a committee
- Board Members are LU donors and help make community connections
- Board Members participate in annual in strategic planning
- Board Members attend LU events

# WE ARE FINANCIALLY STRONG

We have long-term sustainability and the financial ability to handle unforeseen needs and take advantage of opportunities

- We have annual audit with no significant findings
- Our have complete revenue management systems that ensure we are billing and receiving all eligible funding
- We have timely and accurate monthly financials
- We have a strong reserve averaging at least 90 days
- We have a good debt policy that allows us to take advantage of opportunities to help us meet our mission
- We have a strong investment policy
- Financial Analytics drive decision making and are intertwined into our Quality Assurance metrics for all programs, departments and LU overall
- We minimize financial risk with our overall structure

# WE ARE A GROWING, DYNAMIC AND INNOVATIVE ORGANIZATION

We are always seeking opportunities for improvement, growth and ways to increase our advocacy for individuals with disabilities and their families

- Position Life Unlimited to have the strongest internal capacity (Resource Departments) to support its staff and organization
- Seize opportunities to grow through new placements, mergers and new program development in a way that increases advocacy, adds efficiencies and helps us reach our mission and strategic objectives (*waivers on hold*)
- Continue to be leaders with our State Association ensuring we have a voice at the state level to advocate for people living with a disability in Missouri

The image features a green top section with a diagonal line pattern, separated from a black bottom section by a jagged horizontal line. The text is centered in the black section.

# GROWTH & INNOVATION INITIATIVES

# TYPES OF GROWTH

- OPERATIONAL GROWTH - DEPTH
- ORGANIC GROWTH
- MERGERS & ACQUISITIONS
- NEW PROGRAM DEVELOPMENT
- PROGRAM REPLICATION

# OPERATIONAL GROWTH - DEPTH

RESOURCE DEPARTMENTS – We are continually evaluating and strengthening our resource departments as needed to support our growing and developing organization. It is the strength of our resource departments that give us the agility to provide exceptional programs, improve merged organizations, exceed our goals and continually improve.

Human Resources: Training, Recruiting, Employee Engagement, Employee Benefits, Wellness

Finance: Accounting, Billing & Revenue Management, Benefits Planning, Representative Payee Services

Information Technology: Technology Systems, Business Analytics

Quality Assurance (with BA Partnership)

Property Management: Housing, Transportation, Maintenance of Properties & Vehicles

Service Navigation: Intake, Transition Services from Youth to Adult, Service Changes

External Relations: Fundraising, Legislative Advocacy, Marketing, Public Relations

# ORGANIC GROWTH

*PRESENT SERVICES.* Team members are hired to meet service demands as caseloads are filled. Growing these services does not require large up-front capital. The only initial expense is for new salaries until caseloads are filled. These initial salary amounts fit within our annual budgeted salaries.

*ADJACENT SERVICES.* New adjacent services are sometimes started with organic caseload growth when they fit within the present budget. Examples: Transitions Services that tie in with our Intake and Recreation Services, Community Networking Services that tie in with our Community Support Options program, Occupational Therapy that ties in with our Health Services and ABA Services, Nutrition Services that tie in with our Community Living, Recreation and Training programs/departments.

# MERGERS & ACQUISITIONS

- Immacolata Manor and Concerned Care merged in 2014 and changed their name to Life Unlimited.
- Open Options merged with Life Unlimited in 2016
- In 2021 we acquired a small provider with four homes-- A Touch of Love
- MERIL merged with Life Unlimited in 2024. MERIL provided services to people with all disabilities not only IDD.
- We continually search for and are open to mergers that will help us meet our mission

# NEW PROGRAM DEVELOPMENT

Life Unlimited considers developing new programs when a need has been found within the organization or within the disability community.

Examples:

- We created our Unlimited Properties Management Program after raising \$3Million dollars to meet our biggest need of accessible and affordable housing. We renovated and/or built 14 new homes in 2016.
- We created our Employment Program
- We created our Applied Behavior Analysis Program
- We created all of our Resource Departments in the last 6 years to support our various programs. Our finance team now runs our Rep, Payee and Benefits Specialists programs. Our training department supports all program areas to ensure we have the best trained team members in all areas.
- *New Programs that are out of our area of expertise would probably best to be started at a local level so that support and oversight is available in person.*

# PROGRAM REPLICATION

- Program Replication is expanding present programs that are an area of strength for your organization in other locations.
- Examples: My Day in Lee's Summit and Employment Services in St. Joe
- Life Unlimited's key program areas of expertise can be replicated in different geographic locations due to our successful experience with these programs.

# FUNDING GROWTH

- Organic Growth is funded through grants and present pay for service funding streams that are built into our annual budget
- Purchases of homes has been 100% funded through cash for the last 9 years. All homes of merged organizations have been paid off in full. We presently own 47 homes, rent 20 and 171 beds. During the next phase of home development we will purchase homes with a combination of cash and loans.
- My Day Buildings have been a combination of cash and loans. Presently we have 3 My Day programs. 1 building we own with no debt, 1 we rent and one we paid for with cash and loan.

# DEBT POLICY

# Notes Payable

## to Asset Ratio (NPAR)

Life Unlimited will not exceed a notes payable to asset ratio of 25%. Our Notes Payable to Asset Ratio (NPAR) consists of the total net assets plus accumulated depreciation on buildings and improvements.

Life Unlimited's present notes payable to asset ratio is 16%.

Country Club bank's recommendation is up to 30% of market value. Our policy is based on book value, which is considerably lower than market value and 5% less than the recommendation—therefore maintaining a very conservative policy.

# 2025, 2026 & 2027 PRIORITIES

## ○ BUILDING CAPACITY

- Build Depth in Departments
  - External Relations, Quality Assurance & Finance.
- Microsoft DCG - IT Assessment and Implementation Plan
- Program Playbooks
- A Meaningful Day QA Program w/ Financial Analytics

# 2025, 2026 & 2027 PRIORITIES

## ○ “THE TRAILS” NEIGHBORHOOD

### ○ Fundraising:

- 2024 - The first \$5M was raised
- 2025 - Fundraising goal is \$8M
- 2026 - Fundraising goal is 8M
- 2027 - Fundraising goal is \$9M

### ○ Building:

- 2025 - Phase 1 infrastructure will be built in the spring
- 2025 – The first 4 LU homes will be built, 1 community homes will be built
- 2026 – 10 LU homes will be built by LU, 2 community homes will be built
- 2027 – 10 LU homes will be built, 3 community homes will be built

## ○ COMMUNITY LIVING – JACKSON COUNTY HOUSING

- 2025 -- Purchase 2 homes
- 2026 -- Purchase 2 homes
- 2027 -- Purchase 2 homes

# 2025, 2026 & 2027 PRIORITIES

## ○ MY DAY EXPANSION

- Blue Springs will open in March 2025
- St. Joe will open in the fall of 2025
- Buildings will be explored for an additional Clay/Platte Location for 2026

## ○ NEW OFFICE SPACE

- Opening March 2025

## ○ COFFEE SHOP

- Opening Fall of 2025

## ○ MANOR THRIFT / ARC THRIFT

- Potential Mergers in 2025 & 2026

# PRIORITIES FOR 2025, 2026 & 2027

Opportunities Process –As New Significant Opportunities arise LU's CEO and Strategy Team will assess the opportunity. If they believe this opportunity could be a benefit to LU's mission and it is one that the organization could take on the CEO will submit a Business Plan to the Board's Executive Committee and ask for a meeting to start discussions.

# STRATEGY TEAM

# EXECUTIVE TEAM

- Julie Edlund  
Chief Executive Officer
- Mark Bertrand  
Chief Housing Officer
- Andrea Black  
Chief Program Officer
- Susie Schneider  
Chief Employee Engagement Officer
- Amy Taylor  
Chief Operating Officer
- Seth LaBean  
Chief Financial Officer
- Jen Beutel  
VP of Community Programs
- Vincent Bustamante  
VP of Training
- Mallorie Crane, RN  
VP of Health Services
- Mary Davis  
Sr. VP of Community Living
- Laura Hale  
VP of Quality Assurance & IT
- Christy McGuire  
Regional VP of NWMO Programs
- Emily Morgan  
VP of External Relations
- Bart Vickers  
VP of Marketing
- Brian Watson  
Chief Accounting Officer

# BOARD MEMBERS

○ Alisa Ford – Chair

Retired HR Executive

○ Matt Eckert – Vice Chair

Sr. VP– CBRE, Inc.

○ Luke Guettermann – Treasurer

VORVIS

○ Jack Fry – Secretary

Fry and Associates

○ Kayla Curiel

Director, Children's Mercy Hospital

○ Eric Johnson

Assistant Superintendent – North Kansas

City Schools

○ Kelly Narowski

Disability Rights Advocate & National  
Speaker

○ Andy Protzman

Protzman Law Firm