

FY 2026 – FY 2028 Strategic Plan



Community Residences, Inc. dba CRI
14160 Newbrook Drive, Chantilly VA 20151

Letter from the CEO

Fifty years ago, CRI was founded on a simple yet profound belief: individuals with developmental disabilities and serious mental illness deserve the opportunity to live and thrive in a community setting. Fifty years later this belief in community still functions as the core of our purpose and values.

As we celebrate this half-century of achievement, we also look ahead. The next fifty years will bring new challenges and opportunities, and this strategic plan serves as our roadmap for the future. It is designed to strengthen CRI—making us more resilient, more innovative, and more impactful—so that we can continue transforming lives for decades to come.

Our plan centers on five pillars: **Growth, Talent, Infrastructure, Relationships, and Fundraising**. Each pillar is equally important, anchored in measurable goals that will propel our mission forward and expand our reach.

We have embraced this process with transparency, and in that same spirit, we proudly share this plan as a guiding document for the entire CRI community. Over the next three years, this strategy will be translated into actionable one-year plans, which in turn will direct the operational efforts of every part of our organization. This alignment will enable us to grow as a team, deliver the highest quality care, amplify our impact in the communities we serve; and advocate with a clear, coherent, and unified voice.

CRI has already made a profound difference in thousands of lives. With this bold vision, we are prepared to expand our impact—supporting more individuals, strengthening more communities, and shaping a future where everyone has the opportunity to thrive.

We cannot get there alone and we would not have gotten this far without a great deal of support. We want to express our gratitude to all those whose efforts and insights helped bring this plan to life. A full list of acknowledgments can be found at the end of this document.

Thank you for being part of this journey. Together, we will continue building a more resilient CRI and a more inclusive and empowered future for everyone we serve.



Mission and Values

CRi is a community-based nonprofit organization dedicated to providing personalized resources to people with developmental disabilities and mental health needs. We believe in serving people within the communities in which they live. For nearly 50 years, we have focused on individualized and professional care, supporting the people who need us most.

This strategic plan seeks to move CRi into its next 50 years in a way that builds on our strengths and on our values, continuing to help people be the best versions of themselves, while serving the evolving needs of the future.

- **Our Mission:** CRi is dedicated to providing personalized resources to youth and adults with mental health needs and/or intellectual/developmental disabilities.
- **Our Vision:** CRi envisions a world where all people have choice, respect, and the resources needed to live a fulfilling life with dignity and purpose.
- **Our Values:**

<i>Community</i>	<i>Empowerment</i>	<i>Excellence</i>	<i>Integrity & Transparency</i>	<i>Innovation</i>	<i>Responsible Stewardship</i>
We believe in the power of belonging and strong, connected communities.	We equip people to pursue goals and make positive choices through whole-person support.	We deliver high-quality, person-centered services with clinical and professional excellence.	We lead with honesty, accountability, and authenticity in all we do.	We champion bold ideas, advocacy, and technology to improve lives.	We use resources ethically and efficiently to achieve meaningful impact.

Strategic Priorities

This plan is focused above all on building the resilience CRi will need to thrive and to improve lives for another 50 years. Over the next three years, CRi will embrace five strategic priorities of equal importance, all aimed at building this long-term resilience:

- **Growth**, prioritizing growth in our geographic footprint, growth in mental health services, growth that fills gaps in the continuum of care we offer, and growth that delivers positive margins.
- **Talent**, building the right structures to recruit and retain the right people as both employees and Board members.
- **Relationships**, widening and strengthening our network of allies, collaborators, and partners, while also increasing our visibility and our advocacy efforts.
- **Infrastructure**, elevating our technological capacity and efficiency.
- **Fundraising**, building the talent and systems required to significantly increase the size of our Foundation.



FY26-FY28 Strategic Plan

Five pillars of focus that are centered on creating and maintaining the
RESILIENCE
of the organization in alignment with our Mission, Vision, and Values



Strategic Priority: Growth

Growth is a central focus—expanding our geographic footprint, broadening our mental health services, filling critical gaps in the continuum of care, and pursuing growth that delivers positive margins. In all areas, growth may be through acquisitions as well as organic.

Growth in our geographic footprint. CRi's aspiration is to become a significantly larger regional player, with the long-term goal of doubling in size, reaching \$100 million in annual revenue. To move towards that goal, over the next three years CRi will:

- Pursue significant short-term growth in Virginia, developing plans and pursuing opportunities that (1) create multiple CRi hubs across the Commonwealth and (2) establish smaller programs between the hubs.
- Grow incrementally in Maryland, primarily by building on current programs and developing new community programs, in order to set the stage for larger-scale growth in five to ten years.

Growth in mental health services. There is an acute need for additional mental health services, there is the potential for greater funding, and many of our existing residents and community program participants also have mental health challenges. CRi has a strong foundation in mental health services, including both residential and community programs. At the same time, expanding further into mental health requires new kinds of talent, processes, and infrastructure. With that in mind, over the next three years, CRi will:

- Identify and pursue funded opportunities to expand further into mental health residential programs.
- Add optional mental health services for our existing clients, with the goal of building a base of programs that can ultimately be offered to the community more broadly, when and if such opportunities emerge.
- On a parallel track, conduct a market and needs assessment of mental health services to equip CRi to more proactively identify and meet community needs. Among other things, this would include examining the feasibility of outpatient community-based programs, how and whether substance abuse programs could be integrated, and the economics of different kinds of services in mental health.

Growth that fills gaps in the continuum of care we offer. Our vision inspires us: We want all those we serve to have choice, respect, and the resources needed to live a fulfilling life with dignity and purpose. While CRi cannot be all things to all people, we can and do provide care and support that meets diverse needs, and our goal in the next three years is to make that continuum of care even more robust. Achieving the goals described above will by definition

Growth

- Larger geographic footprint
- Growth in mental health services
 - Filling gaps in continuum of care
- Positive margins

enhance our continuum of care, both in what we offer and where we offer it, and to push ourselves to fill even more gaps, in the next three years CRi will also:

- Develop a working definition of what a full continuum of CRi-provided care could look like, including clarity on what should be excluded from CRi's scope, followed by a business development plan aimed specifically at filling gaps.

Growth that delivers positive margins. Across all its programs, CRi will pursue greater financial resiliency and sustainability by pursuing bottom-line as well as top-line growth. This is critical to our ability to invest in our people and in our infrastructure. To that end, over the next three years, CRi will:

- Evaluate every program addition and expansion in terms of its likely impact on overall margins, looking for a zero- to positive-margin business plan for every program. This evaluation does not substitute for also evaluating how important each program is to our residents and program participants, and how well it serves other strategic goals. The intent is not to ensure that every program and service deliver equivalent bottom-line returns, but rather to help CRi ensure a mix that simultaneously supports our mission while ensuring our sustainability for many years to come.

Evaluating Success

Over the next three years, we will measure and monitor our progress in achieving this plan's goals through a mix of quantitative and qualitative indicators.

Programs and Services

- Virginia: A residential presence in at least one additional hub and programs in at least two new Virginia locations between hubs.
- Maryland: Year-over-year revenue growth and at least one new community program in Maryland.
- Mental health: At least one additional residential program in mental health and at least two additional services related to mental health made available to our existing clients.

Foundations for Future Growth

- Presentation of a mental health market assessment to the Board of Directors, accompanied by preliminary recommendations.
- A Board-endorsed continuum-of-care model appropriate for CRi, accompanied by a business development plan directly informed by that model.

Margin

- Improvement in margins as a percent of revenue.

Strategic Priority: Talent

Talent is key to our future—building the right structures to recruit and retain exceptional people, both as employees and Board members. CRi can only achieve its mission and deliver the highest quality care if we have outstanding people, from our caregivers to our managers to our leaders, who are organized in a way that maximizes their effectiveness. To that end, in the next three years, CRi will:

- Cultivate a culture that reinforces our values, rewards effective collaboration and problem-solving, and provides opportunities for professional development, which is essential for delivering quality care and services.
- Develop an operating model that can support geographic growth. This means ensuring that all programs, regardless of location, have reasonable proximity to the expertise and operational leadership needed for both quality and efficiency.
- Expand and modify our governance structure in order to engage more community thought-leaders, build a wider and stronger Board pipeline, and evolve the Board's skillsets and networks in ways that support our growth strategies.



Evaluating Success

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Employee Experience

- Year-over-year improvements in statistics on retention, training participation and compliance, and promotions.
- High levels of employee participation in annual climate surveys, with high reported levels of job satisfaction, commitment, and perceptions that CRi lives its values.
- Consistent employee satisfaction ratings in all hubs and programs, regardless of distance from headquarters.

Board Pipeline

- Year-over-year growth in the size of the Board pipeline (e.g., the number of non-Board members serving on Committees, a growing list of candidates for Board membership and for membership on affiliate Boards).
- An annually refreshed Board matrix that tracks current and desired Board composition.

Strategic Priority: Relationships

Relationships remain foundational—widening and strengthening our network of allies, collaborators, and partners, while also increasing visibility and advocacy efforts. While we are proud of the strong working relationships we have with local governments, state governments, advocacy organizations, and partners, CRI will seek to enhance these further over the next three years. To that end, CRI will:

Relationships

- Referrals generation
- Communication with state and local officials
- Board-led advocacy

- Continue pro-active communication with case managers to generate referrals, and expand these communications to a wider range of potential referral sources.
- Increase CRI's visibility with state and local government officials in order to build awareness and increase interest in CRI's point-of-view and expertise.
- Cultivate, equip, deploy, and coordinate more advocates and ambassadors. This may include expanding and strengthening our Board-led advocacy committee, equipping it with clear and consistent messages, delivered at an increasing number of touchpoints, including provider organizations.

Evaluating Success

Over the next three years, we will measure and monitor our progress in achieving this plan's goals through a mix of quantitative and qualitative indicators.

Infrastructure and Resources

- A workable method for maintaining and tracking interactions with key leaders.
- A regularly refreshed message manual.
- An advocacy committee with at least six active members.

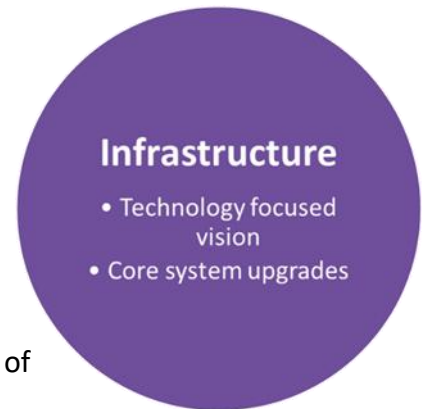
Relationship Tracking

- Year-over-year growth in the number of referrals.
- Year-over-year growth in the number of meetings, repeat meetings, and invitations from elected officials, professional associations, and advocacy organizations.

Strategic Priority: Infrastructure

Technology Infrastructure is critical—elevating our technological capacity and efficiency to better support our work. To achieve this, in the next three years, CRi will:

- Develop a clear and forward-looking technology vision to ensure CRi is appropriately equipped to support its mission, collaborating with the clinical team to identify cost-effective solutions for collecting and analyzing data that enhance quality of care.
- Contingent on budget capacity, upgrade three core systems: our electronic health records (EHR) system, our customer relationship management (CRM) system, and our website. We want our EHR system to have better interoperability, the capacity to manage both our intellectual disability and mental health programs, and improved capabilities around quality measurement and tracking. We want our CRM system to be useable and well-used across CRi, whether managing donor relationships, partnerships, or advocacy relationships. We want our website to have greater functionality and an improved user experience.



Evaluating Success

Over the next three years, we will measure and monitor our progress in achieving this plan's goals through a mix of quantitative and qualitative indicators

Infrastructure and Resources

- A workable method for maintaining and tracking interactions with key leaders.
- A regularly refreshed message manual.
- An advocacy committee with at least six active members.

Improvements

- An EHR system with expanded capabilities.
- A CRM system that can be utilized for stakeholder relationship management by multiple departments.
- A more easily navigated website with greater functionality.

Strategic Priority: Fundraising

Fundraising is a vital enabler—investing in the talent and systems required to significantly increase the size and impact of the Foundation. The reality is that CRI's programs and services are enormously expensive to provide at the level of quality we expect. Our Foundation therefore plays a critical role, as it allows us to invest in our people, in our infrastructure, and in innovation. To grow at the scale we would like, our Foundation must keep pace. To that end, over the next three years, CRI will:

Fundraising

- Professional fundraising team
- Impact Assessment

- Build a fundraising department led by an experienced Fundraising Manager, supported by a dedicated team and deliberate strategy.
- Assess whether staffing the Foundation in this way can meaningfully increase its size.

Evaluating Success

Over the next three years, we will measure and monitor our progress in achieving this plan's goals through a mix of quantitative and qualitative indicators

Infrastructure and Resources

- A dedicated fundraising team in place with a Board-approved fundraising strategy.

Funds Raised

- Annual fundraising revenue that matches or exceeds the development team's entire annual budget, including every member of that team (fundraising, business development, and communications), and including the team's salaries and all related costs of pursuing grants and contracts.

Acknowledgements

Many people contributed to the development of our strategic plan, offering their time, their expertise, and their wise counsel. CRI's Strategic Planning Task Force conducted dozens of interviews with individuals inside and outside our organization, including public officials, colleagues at partner agencies and other provider organizations, and current and former CRI staff and Board members. Over the course of six months, we met multiple times to discuss, debate, and formulate our plan.

We are grateful to everyone who participated, and we offer our deepest thanks to **Jennifer Sosin**, who so generously donated her time and extraordinary talent to guide us through the planning process and helped us develop this strategic plan—her insight, dedication, and care were invaluable, and we are profoundly grateful for her partnership.

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