



SUMMERHOUSE HOUSTON

FY27 – 29

STRATEGIC PLAN

where lives blossom

What we protect. What we build next.

WHY THIS PLAN, NOW

Fifteen years in, and still looking ahead.

As Summerhouse Houston celebrates its fifteenth anniversary, our Board and Leadership Team are looking ahead. This past year brought a new CEO. Demand is up, new opportunities keep presenting themselves, and some of the systems built for a smaller organization are starting to strain.

These are signs of a maturing organization, one that needs to take a hard look at its own infrastructure and how it makes decisions, so we can protect the quality of our programming while finding new ways to support more members and families.

We didn't take this on alone. Members, families (current, former, and prospective), staff, funders, and our Board all weighed in, and on July 25, 2026, the Board and Leadership Team spent the day together grappling with the hard questions around what to protect and what to grow. This plan is what came out of that work.



15

**YEARS SERVING GREATER
HOUSTON'S IDD COMMUNITY**

We're proud of where Summerhouse is today and excited about where we're going next. Our Board and Leadership Team are committed to growing thoughtfully, staying true to who we are, and creating more opportunities for the people we serve. We're grateful to everyone who helped us get here, and most of all, grateful to be building what comes next together.

Linda Bates

Chief Executive Officer

Connor Wiginton

Board Chair

OUR FOUNDATION

Mission, Vision & Values

OUR PURPOSE

Summerhouse Houston exists so that our members are known as individuals and truly belong in and contribute to their community on their own terms. We provide person-centered, community-based social and employment pathways for adults with intellectual and developmental disabilities, grounded in dignity, choice, respect, and real independence.

OUR VISION FOR 2029

By the end of 2029, we envision an organization where every member has a clear pathway to a meaningful life of their choosing, and the families who trust us still recognize the Summerhouse they chose. We envision Summerhouse as a standard-bearer for person-centered, member-driven services for adults with IDD. Our core values will not change.

OUR VALUES

TRUST

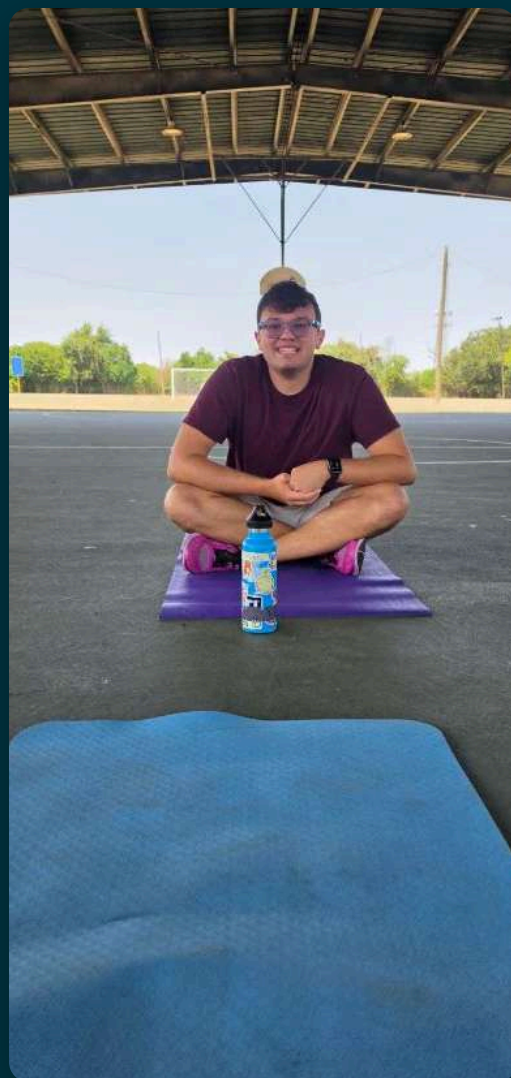
DIGNITY

CHOICE

RESPECT

INDEPENDENCE

OPPORTUNITY



HOW THIS PLAN WAS BUILT

Built with our community, not for it.

01 **Listening**

Surveys gathered input across members, families (current, former, and prospective), staff, funders, and the Board.

02 **Looking Inward**

The Board completed a governance self-assessment; program leaders began a phased review of the current program design.

03 **Working It Through**

On July 25, 2026, the Board and Leadership Team spent the day together grappling with the hard questions around what to protect and what to grow.

04 **Setting Direction**

Six framing questions carried the day, from what's most urgent to what Summerhouse should be known for by 2029.



Five Strategic Pillars

Every stakeholder group named the employment pathway as its top priority: staff, Board, current families, and the families we haven't been able to serve yet. Systems & Infrastructure drew more votes than any other pillar for building, not protecting. The plan below carries that direction forward.

Systems & Infrastructure

BUILD

By 2029, Summerhouse can add a partner site or a service line while maintaining the quality families expect, supported by a program CRM and shared standards that replace processes that have historically depended on individual knowledge.

Revenue Resilience & Advancement

BUILD

By 2029, Summerhouse has a more diverse and sustainable revenue model, with earned revenue built into the community and employment pathway.

Programmatic Quality

BUILD + PROTECT

The 1:4 ratio and person-centered model stay the standard, while employment pathways, our top shared priority, become one of the strongest ways Summerhouse can expand opportunity and serve more people.

People & Culture

PROTECT

We will grow responsibly, ensuring staffing and resources are in place before enrollment expands, with retention tracked alongside program numbers.

Board Capacity & Growth

PROTECT

Our Board will continue to strengthen its leadership, knowledge, and capacity alongside the organization.

Year One focus: Systems & Infrastructure, Revenue Resilience & Advancement, and Employment Pathways carry the majority of 2027 investment and Board attention. People & Culture and Board Capacity & Growth stay funded and active, protecting the foundation while the other three build.

Building the Foundation

PILLAR • BUILD

Systems & Infrastructure

This pillar drew more votes than any other. Staff were specific about what's missing: no program CRM, standards applied differently across teams, and Community and Employment Programs running like two separate organizations. The Board decided to build the operating backbone first.

BY 2029

- Summerhouse can add a partner site or a service line while maintaining the quality families expect from Summerhouse.
- A program CRM, transition standards, and a defined admissions process bring shared systems and clear standards that replace processes that have historically depended on individual knowledge.
- IT infrastructure is modernized, with a thoughtful approach to how we use emerging tools like AI.

PILLAR • BUILD

Revenue Resilience & Advancement

Tuition carries most of our Community Program today. As the funding environment continues to change, we are building other dependable sources of revenue before we need them.

BY 2029

- At least one new earned-revenue line beyond tuition and contracts has been developed, with a path toward covering its own costs.
- Our scholarship program is redesigned for long-term sustainability.
- Financial systems and reporting are upgraded to match the complexity of a more diverse funding model.



Programmatic Quality

The 1:4 ratio, person-centered planning, and real belonging are what our community protects hardest. Employment came back as the top shared priority for everyone who weighed in.

PROTECT

Community & Belonging

The 1:4 ratio, PATH planning, and our person-centered model were what our community was most protective of: 28 of 29 mentions in the protect exercise, and the highest-rated part of the family survey. The Board decided these are standards, not aspirations: written down and held constant through growth. We also agreed on what we won't do: no residential programming, and no partnership that puts Summerhouse in competition for its own funding.



BUILD • TOP PRIORITY

Employment Pathways

Employment was the top shared priority across every group that weighed in. Over the next three years, we will build clearer pathways from skill-building and volunteering to job exploration and paid work, while continuing to strengthen our dedicated Employment Program. By 2029, Summerhouse aims to be a trusted employment connector in Greater Houston, supported by a strong network of employers who know our members and our model.



The People Who Carry It

PILLAR • PROTECT

People & Culture

Staffing capacity limits both programs: the Community Program by the 1:4 ratio we've agreed to protect, and the Employment Program by its 1:1 model and the qualifications specialists need to provide that support. The culture itself is a strength: staff describe real relationships and mission-driven colleagues, and Summerhouse keeps people after paying for their certification.

BY 2029

- We will grow responsibly, ensuring staffing and resources are in place before enrollment expands.
- The Board tracks retention alongside program numbers.
- Role clarity, performance systems, and career pathways help every employee grow with Summerhouse.



PILLAR • PROTECT

Board Capacity & Growth

Strong governance is essential to responsible growth. As Summerhouse evolves, our Board will deepen its understanding of our programs, strengthen leadership succession and committee development, and create more opportunities for strategic discussion and connection with our members.

BY 2029

- Board and committee succession plans support continuity and strong leadership.
- Ongoing learning keeps Board members connected to our programs, funding, and community.
- Every Board member can confidently tell the Summerhouse story and speak to what our organization needs to thrive.

Three Years, One Direction

Selected priorities from our annual implementation roadmap

The full roadmap runs deeper than what's shown here. Each pillar's annual objectives translate into quarter-by-quarter initiatives owned by the CEO and Leadership Team, with the Board reviewing progress at every regular meeting.

2027

- Evaluate and select CRM and communication solutions
- Run financial model that estimates tuition at a rate that covers the full cost of the programs
- Design Summerhouse's employment pathway: skill-building, volunteering, job exploration, and paid work
- Plan and fund staffing ahead of enrollment, at roughly one staff member for every four new members
- Build a written succession plan for Board leadership and committee chairs

2028

- Fully implement the CRM and communication systems across programs
- Choose one earned-revenue idea to test, and report all-in cost and resources to run it
- Share the employment pathway with families in plain language, and build a named employer base
- Report retention to the Board alongside program numbers
- Deepen committee bench strength, with the Development Committee named specifically

2029

- Add a partner site or a service line and see whether quality holds without extra scaffolding
- At least one earned-revenue line beyond tuition and contracts is running, with a path to covering its own cost
- Build a standing network of employers who know, trust, and seek out the Summerhouse employment model
- Every Board member can describe the program, its funding, and the current ask the same way

Three-year outcome: Summerhouse can add a partner site or service line while maintaining the quality families expect.

OUR COMMUNITY

Our Community in Action

Known as individuals, belonging on their own terms: this is who the plan is for.





JOIN US

What comes next belongs to all of us.

Whether you're a family member, funder, employer, volunteer, or neighbor, there's a place for you in Summerhouse's next chapter.

GIVE

Help fund the systems, staffing, and pathways this plan calls for.

HIRE & PARTNER

Get to know our members and our model, and help build the employer base this plan depends on.

VOLUNTEER

Spend time alongside our members in the programs that anchor us.

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summerhousehouston.org