

Governmental Relations Strategy Plan



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Finalized: June 10, 2024

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Abstract

With organizational growth, governmental affairs work, enabling meaningful contributions to the public dialogue, becomes an essential organizational function to ensure the organization's interests are considered in key policy decisions. Broadly, the governmental affairs function of an organization aims to influence public policy, build and maintain strong relationships with legislators and other decision makers, and engage with stakeholders to promote achievement of Boundless' mission. This plan includes defining metrics of success of the organization's government relations work and descriptions of the activities to be engaged in.

The key components of the Government Relations Plan include:

- A defined Government Relations team
- A grassroots advocacy program, Boundless Advocates, comprised of individuals served, family members & guardians, staff, and community stakeholders
- Engagement and impact at the following levels:
 - Local (county, city)
 - State
 - Federal

Section I: Background and Overview

Section I, Part A: Executive Summary

The significant majority of Boundless' revenue comes from local, state, and federal funds. This means that publicly elected officials play a significant role in policy and decision making that impacts Boundless' financial stability and ability to accomplish the organization's mission. It is critical that Boundless develops and maintains strong relationships with these officials to educate and advocate for the needs of people and communities it serves.

As Boundless is now the largest provider of its type in the 7th largest state in the country, the organization has a responsibility to ensure the voices and issues important to the people served are heard. A key component of this work is engagement with stakeholders both internal and external in the health and human services sector. Through partnership and engagement, Boundless amplifies its voice and impact. This includes engagement with people at all levels of the policy making process, including state administration and department officials, local and state officials, publicly elected officials, and trade and advocacy organizations.

Historically, the Intellectual and Developmental Disability (IDD) sector has been under-represented in comparison to other healthcare and human services specialty areas. As services to people with IDD are a significant portion of the services Boundless provides, the organization has a unique opportunity to be a leader in governmental affairs and public policy impact, both within Ohio and nationally. A core component of leading this work includes continuous engagement versus issue-specific or time limited advocacy. Through continuous engagement with decision makers and elected officials, Boundless can develop strong relationships and ties that allow it to respond quickly and effectively when key or sensitive issues impacting this sector arise. Recognizing the fact that elected officials encounter representatives from a wide array of interest groups, it is important that Boundless present itself as a robust health and human services organization with a specialty focus on serving people with IDD, autism spectrum disorders, and other behavioral health needs in a memorable and meaningful way that results in Boundless being the leading organization that decision makers rely on for input, insight, and feedback when pertinent policy decision arise. This is key to avoiding being "behind the decision curve" (i.e., being reactive to policy decisions versus being proactive in shaping policy language and decisions).

Section I, Part B: Organizational Philosophy

Boundless at its core is a mission driven, service minded, nonprofit organization. While it is important for the organization to balance our nonprofit status with a sustainable business model, the individuals and the families Boundless serve have always remained the primary beneficiaries of our organizational resources. It is important that the organization keeps the "Why" for our engagement in governmental

affairs work at the forefront of these efforts. The foundation of our work is to engage with decision makers to ensure the long-term stability, effectiveness, quality, and sustainability of our organization and the industry as a whole. Boundless can only continue to provide quality services if it is confident that it has the financial resources and regulatory environment to support its current and future infrastructure. Our governmental affairs work is centered around ensuring the organization can continue to provide the vital services Boundless offers to individuals, families, and communities.

It is incumbent upon us to make the case to our elected leaders and other decision makers that investing in and supporting organizations like Boundless results in tangible economic and societal benefits. Our work strengthens communities; rural, suburban, and urban communities alike. Boundless must be prepared to demonstrate that the Boundless models of delivering care and services are efficient and effective and that with continued investment and support, Boundless is enabled to continue to innovate and lead the sector in ongoing improvements in quality, efficiency, and effectiveness. Our message to decision makers is that the people, families, and communities in need of these services deserve the best possible care and that through partnership, those decision makers and Boundless can ensure that such care is delivered, both today and into the future.

Section I, Part C: Defining the Team

The Governmental Affairs Team (GA team) will be the organization's main lobbying and advocacy representatives. Other key leadership members may also participate in these activities, as indicated. These may include executive team members, families and guardians, and other key organizational leaders.

Section I, Part D: Communications and Governmental Affairs Work

Collaboration with the internal Communications and Marketing department is crucial for the GA Team to ensure consistent messaging across channels, as well as to ensure relevant and timely materials are available for education and advocacy efforts of the GA team.

To accomplish this collaboration, the GA team will monitor the activities and calendars of the relevant legislative bodies and engage in frequent communication with the Communications and Marketing department, as needed. Most of this collaboration can and will be scheduled ahead of time based on regularly scheduled activities of the legislative bodies, for example budget cycles. Additionally, as time sensitive or especially critical pieces of legislation are under development or in the approval process, the GA team will have regularly scheduled meetings with the Communications and Marketing department to ensure timely and coordinated response and action.

Section I, Part E: Advocacy vs. Lobbying Activities Defined

Advocacy is defined as educating donors, stakeholders, legislators or others about the organization's mission, services, workforce, or population served.

Within the organization, the GA Team and other approved staff members or stakeholders are authorized to advocate on behalf of Boundless.

In Boundless' participation with consortiums, coalitions, professional organizations, and trade associations, Boundless staff may take part in the group's advocacy work if it is consistent with Boundless' mission and goals. If a staff member is uncertain whether the consortium, coalition, professional organization, or trade association's position on a particular issue is in alignment with Boundless' best interests or position on the issue, the staff member should consult with the GA Team prior to endorsing a position on behalf of Boundless or engaging in work supporting the position as part of their role with Boundless.

Staff members who engage in advocacy as a part of their participation in a consortium, coalition, professional organization, or trade association as part of their role with Boundless must notify the GA Team of their work and any positions endorsed. These efforts will be monitored and tracked by the GA Team.

Advocacy Efforts taken by staff members or other stakeholders in a personal capacity may be tracked by the GA Team, specifically when they are engaged in as a direct result of encouragement or invitation to do so by the GA Team as a component of the Boundless Advocates program (program defined below).

Lobbying is defined as "carrying on propaganda, or otherwise attempting, to influence legislation." Lobbying refers to actions that strive to influence lawmakers to pass or overturn laws that favor a certain cause.

As a 501c3 non-profit entity, Boundless' participation in lobbying is regulated by federal law and care must be taken to comply with all federal rules and regulations related to lobbying.

Lobbying falls into two distinct categories.

- Direct lobbying includes a representative(s) of a nonprofit organization directly contacting legislators, or their staff, to influence the legislator's votes on certain matters.
- Grassroots lobbying is an activity where one or more nonprofits band together to shape the general public's view on a law or bill and encourage the general public to contact legislators to influence their votes.

Prior to engaging in advocacy activities or lobbying on behalf of the organization, all staff or stakeholders must ensure that:

- The GA Team is aware of the intended activity.
- The position intended to be expressed aligns with the organization's official position.
- They understand the difference between advocacy and lobbying and the requirements related to tracking and reporting of lobbying.

The GA Team may invite or encourage other staff members and stakeholders in advocacy or lobbying activities on behalf of the organization. These individuals will be identified and documented by the GA Team and will be prepared to engage in any advocacy or lobbying efforts by the team prior to any engagement in advocacy or lobbying.

The GA Team and Boundless will work from time-to-time work through our contracted lobbying firm, Kallner & Associates. Boundless will use Kallner & Associates strategically throughout our advocacy and governmental affairs work. Kallner & Associates will help advise the GA Team on strategy and work to target key legislative members. Kallner & Associates will also directly lobby on behalf of Boundless specific priorities that may fall outside of the scope of advocacy efforts the full IDD community is engaged in.

Section II: Tenets of Successful Governmental Affairs and Advocacy Work at Current Scale

Section II, Part A: Overview of Past Work and Historical Successes

Through its active participation in advocacy, trade, and professional associations, as well as through engagement of professional lobbyists, Boundless has engaged in issue advocacy, education, and lobbying pertaining to specific pieces of legislation over the past several years. Also, Koinonia, which came together with Boundless in 2023, engaged in robust advocacy work related to passage of the FY24/25 State Operating Budget. This budget resulted in historic investment in health and human services, specifically for Intellectual and Developmental Disability services and Behavioral Health services. Strategies employed to achieve this significant positive outcome included:

- On-site visits and tours of facilities and sites where services are being delivered,
- Letters and outreach from staff members and family members of persons served to legislators,
- Repeated In person testimony provided to The House Committee on Health and Human Services, The Senate Medicaid Committee, and The Senate Finance Committee;
- Written testimony from staff members and family members of persons served to The

House Committee on Health and Human Services, The House Finance Committee, The Senate Medicaid Committee, and The Senate Finance Committee at each step in the budget process; and

- Targeted follow up including Thank You cards, emails, letters, and personal outreach to legislators and members of the administration following visits and opportunities to provide testimony.
- Additionally, to ensure sustained relationship building, Koinonia also sent scores of thank you and congratulatory cards and letters to legislators and other key decision makers. These efforts have all resulted in ongoing goodwill, additional site visits and interest in the services and programs provided.

Section II, Part B, Understanding the Political Arena

Organizational GA planning and strategy can often be difficult to formulate long term given the frequency in which political power can change hands at the local, state, and national levels. While Boundless is committed to nonpartisanship, and engaging with members of both parties, Boundless cannot ignore how partisan politics affect our policy objectives. Neither party approaches our issue area from the same perspective. In the modern political era, the Democratic Party has typically been more open to expanding funding for human services while advocating for policies that would modernize and strengthen the existing social safety net. The Republican Party has become increasingly skeptical of the size of the government's role in social spending. There is a widespread belief within the party that either large-scale cutbacks of social programs or larger-scale reform, such as privatization, is needed for long-term fiscal sustainability.

While IDD issues are generally not highly partisan issues, Boundless cannot ignore that our industry is surrounded by major policy discussions that have become extremely partisan (Medicaid, certain behavioral health issues, and the greater social safety net). Our policy goals, both at the state and national levels, are inherently tied to a political process. It is critical that the organization understands these dynamics and that the GA team monitors them to best tailor our strategy. This is often a moving target as this process is dynamic and ever changing, so understanding the basics is crucial. The long-term success of our legislative priorities is very much contingent on the policy priorities of whichever party holds power both at the state and federal level.

Local Level Dynamics Defined

Local elections are often the most difficult to track and assess, given all municipalities and counties operate on different election schedules. Often, local elections, city and county, take place in odd-numbered election years. These elections typically have lower turnout and are difficult to predict. Given the impracticality of tracking all local elections in all cities and counties Boundless operates within, our efforts will be focused on cities and counties of regional significance. These would be regions with either large population centers or a high concentration of services or staff. Mayoral,

and county commissioner or county executive seats are likely to impact Boundless the most significantly in these regions.

State Level Dynamics Defined

Throughout the United States, a state budget process requires a state's legislature and governor to work together. The governor of a state typically begins the budget process by presenting a "Governor's Budget" to the state legislature. This is a proposal of the Governor's budget priorities and is viewed as an opening bid to a state legislature. The official budget bill is typically introduced by the chair of the state house finance committee, where the budget process typically starts at the state level. How closely this budget bill mirrors the governor's budget is determined by several key factors:

- The political party of the governor
- The political party that controls the state house
- The political party that controls the state senate
- The size of the majority in the state house
- The size of the majority in the state senate
- The Governor's relationship with the legislature, specifically the legislative floor leaders

These are all items the GA team will assess and monitor before and during a state budget process. All these items will affect the strategy the organization chooses to implement.

Besides a state budget, Boundless may sometimes determine the need to engage with the state legislature regarding standalone bills that affect our organization. Individual members of the state legislature typically introduce stand-alone bills. All members are entitled to introduce bills but there are several factors that will determine if the stand-alone bill is to be successful:

- Is the primary sponsor a member of the majority or minority party in the legislature
- Does the primary sponsor occupy a leadership position (committee chair, floor leader etc.)
- Does the Governor support or oppose the stand-alone bill
- What is the sponsors relationship with their colleagues

The GA Team will assess and monitor all these items as they assess how the organization should engage in the legislative process regarding a stand-alone bill.

Outside of the legislative process, at the state level the organization must also be aware of administrative rulemaking conducted by the incumbent Governor's administration. All states go about this process slightly differently, but the fundamentals of engagement are similar. The GA Team will monitor applicable rules and determine how to best engage in the rulemaking process. Engagement

(providing feedback, public comment, or testimony) will only be needed if the organization strongly supports or opposes a certain rule.

Federal Level Dynamics Defined

At the federal level, legislation requires approval of both houses of the US Congress and then the signature of the incumbent President. There are several key factors that will determine the potential success of a piece of federal legislation Boundless is engaged in advocating for or against:

- The political party of the incumbent president
- The political party that controls the House of Representatives
- The political party that controls the US Senate
- Is the bill supported by the incumbent president
- Is the primary sponsor of the bill in a leadership role (floor leader, committee chairperson, etc.)
- Is the primary sponsor of the bill in the majority or minority party
- Does the bill have bipartisan support
- Is the bill being considered via regular order or via budget reconciliation

The GA team will consider these factors when developing a strategy for engaging in the federal legislative process. This will also help the GA determine how to best assist our federal level partners.

Outside of the legislative process, at the federal level the organization must also be aware of administrative rulemaking conducted by the incumbent President's administration. The GA Team will monitor applicable rules and determine how to best engage in the rulemaking process. Engagement (providing feedback, public comment, or testimony) will only be needed if the organization strongly supports or opposes a certain rule.

Section II, Part C: Local Level Engagement Strategy

While most of our funding stream originates from the federal level, and it is appropriated and distributed at the state level, there are still significant amounts of funding that are available at the county and city level. Boundless will prioritize building relationships with relevant municipal and county governments in geographic areas of high population density, or where the organization provides a large volume of services. Large municipalities and counties have vast resources at their disposal and local decision making does impact our operations. Boundless will strive to, whenever possible, to ensure the organization has good relationships with relevant local leaders and decision-making organs (county boards, county health departments, city halls, county commissioners, etc.). These relationships will promote Boundless' brand and create a local network of understanding. These relationships will also put Boundless in a better position to seek out funding opportunities from

local government entities, specifically for one-time projects. Local leaders are often future state and federal leaders. Building relationships early on with key local officials can provide future benefits should they advance in their political careers.

In addition to local governmental entities, Boundless will also seek out local community groups in regions of significance for the organization. These groups can include community trade organizations, chambers of commerce, think tanks, etc. These relationships will allow Boundless to build brand recognition and allow the organization to become ingrained in the fabric of the communities' Boundless serves.

Section II, Part D: State Level Engagement Strategy

Boundless' services are currently only available in Ohio; however, its Strategic Plan includes National Service Line Expansion. While each state operates uniquely, the fundamentals of engagement will remain similar. Relationships and sustained engagement with relevant state agencies and decision-making organs will be critical for successful outcomes to be achieved. Boundless will engage directly with state legislators, relevant state agency officials, and members of the executive office of the governor as applicable. The GA team will keep a detailed database of all elected officials the organization engages with at the state level in addition to a database of state legislative members who represent districts that Boundless provides services within.

State level GA work is where our attention will be primarily focused, as the state legislature is the key decision maker in most states related to funding allocation. It will be critical to conduct an in-depth review of the timeline and nuances of the funding process for the services Boundless provides in each state where Boundless is actively evaluating providing services through organic growth or mergers, acquisitions, and affiliations. A full review of the service array, benefits system, political dynamics, and funding environment will be included in the due diligence associated with expansion into additional state(s). When a decision has been made to expand into additional state(s), the state legislators and other key decision makers of that state will be added to Boundless GA databases and engagement activities for that state(s) will be incorporated into Boundless' ongoing GA work.

Boundless GA engagement with state legislators pertaining to operating budget legislation that will impact the organization's funding methods or rates is comprised of five stages.

- Stage One: Planning / Foundation Building: One Year to Six Months Prior to the Official Start of the Budget Process
 - Stage One will be our time to start laying the groundwork for our state level budget work. During this time, targeted recruitment efforts for the Boundless Advocates Program will be renewed. This will allow ample time to process that information before the budget process starts. In collaboration with the Kallner Group or other outside lobbying firm, Boundless will determine a list of 10-20

state legislators it should engage with prior to the official start of the budget process. All state legislators that have Boundless services in the district will receive a letter from the GA team before this stage begins. This will provide all members with initial communication from the organization. Before this stage starts, the GA Team and Communications will finalize new marketing materials for the upcoming budget process.

- Stage Two: Post Election Day Work Period- Post Election Day to the End of the Year
 - During this critical work period, Boundless will have a chance to assess the General Election results and determine how the outcomes affect our budget strategy. The balance of power after an election will alter our outlook significantly at the state level. The GA Team's Legislative Database should be updated during this time to reflect the election results and retiring, term limited or defeated members shall be archived. A key step to take during this stage will be to send out letters of congratulations to all members who have Boundless services in their district who won their election. In collaboration with Kallner or another outside group, Boundless will review our updated database and determine an additional list of 10-15 legislators to engage with.
- Stage Three: Pre-Testimony Events- First Quarter of the Official Budget Year
 - During Stage Three the GA expects the Governor's Budget to be officially released to the General Assembly. This will be our first look at what funding is being proposed for our service system. This funding amount should be assessed both internally, with the Kallner group, or other interested parties. Once Boundless determines what the best approach to the Governor's budget is, the GA Team will host several in person "Advocacy Letter Writing Sessions" at Boundless locations throughout relevant regions. These sessions will be open to all Boundless Advocates members employed in the state going through the budget process.
- Stage Four: Public Testimony Period- Second Quarter of the Official Budget Year
 - The GA Team will work to identify and vet quality candidates for in person testimony opportunities. In person testimonies can be given by staff members, family members, individuals served and other relevant stakeholders. The goal will be to prepare candidates for testimony that will have the best chance of making an impact with the committee the budget bill is being reviewed by. Written testimony opportunities will be open to all members of the Boundless Advocates group, and the GA Team will coordinate these efforts. As the budget bill moves through the committee process, the GA Team will also look for opportunities to strategically target members of relevant committees with members of the Boundless Advocates group who may reside in key districts. The GA Team will also continue to meet with state legislators at service settings in their districts during this time.
- Stage Five: Budget Conclusion Period- Quarter After Budget is Signed by the Governor
 - Once the budget is signed, it is important to determine how Boundless will follow up with state legislative members. If the outcome is favorable, the GA

Team will host several "Thank You Note" writing sessions. If the final budget result is less than optimal, the GA Team will determine what the best option for follow up with legislative members is. At this time, the GA Team will also send a formal follow up letter to the Governor, the Director of DODD, and all the legislative members Boundless met with throughout the budget process. Thank you, letters will be sent to all Boundless Advocates who engaged in the budget process by the GA Team. A report of Boundless' budget impact will be drafted during this time, complete with a summary of the work and proposed ideas for the next budget cycle.

In addition to state level budget work, the GA Team will also monitor relevant rules and regulations proposed by state agencies, and other pieces of legislation proposed at the state level that affect our organization and industry. While the budget work engagement will be the primary focus of our grassroots type of advocacy work, the GA Team may determine other times that grassroots advocacy may be helpful in pushing for a desired outcome for a piece of legislation or a proposed administrative rule/ regulation. The GA Team will coordinate this work with identified partners if opinions on a desired outcome are aligned.

Section II, Part E: Federal Level Engagement

At the present time, the organization is not at a size or scale in which Boundless is prepared to directly engage with federal stakeholders on a regular basis. Currently, the best course of action is to utilize our national trade association partners who have operations within the DC market to guide and impact federal policy. The GA team will keep a database of all relevant federal officials Boundless interacts with throughout our work. The GA team will also keep an updated database of all US Representatives and US Senators who represent districts/ states that Boundless provides services within. Should Boundless expand outside of Ohio, the GA team will conduct a full review of the territory to determine which US Representative and Senators will need to be added to our database. Given the complexities of the modern congress, our influence at the national level increases as Boundless expands operations to more states.

While it is presently best to collaborate with our national trade association partners on federal legislative priorities, Boundless still has opportunities to interact with our federal elected officials directly. The organization will invite federal officials to tour the services settings Boundless operate within their districts. These visits will be used to advance our federal priorities, forge relationships, and seek out local funding opportunities. All US Representative and Senators are allocated a dollar amount each federal budget cycle to award to local projects within their states and districts. Boundless will request these funds as needed, as they can be used on a variety of one-time projects. Additionally, as the organization grows and expands into other states, Boundless may solicit the services of a federal lobbying partner, to allow the organization more flexibility and independence to engage in the federal legislative and rule making process.

It is challenging to predict what the political climate will be like in the near future. Federal elections take place every two years in the United States. Midterm elections determine the control of congress and Presidential Elections determine both the presidency and control of the congress. The GA team will monitor how the results of these elections will affect our federal level priorities. While the composition of congress has a high effect on the legislative success of our policy priorities, the legislative and administrative priorities of the incumbent President have more direct influence over our service system, regardless of congressional control. Congress has limited impact on the federal rule making process, and if the administration does not support a piece of legislation that passes congress, it is very unlikely to become law. The GA team will complete a memorandum at least every four years, during presidential election years, outlining the potential outcomes of the election, and declaring how each potential outcome affects our federal legislative priorities.

Section II, Part F: Grassroots Advocacy- The Boundless Advocates Program

In 2024, Boundless is relaunching a grassroots advocacy program called the "Boundless Advocates". This group is made up of Boundless employees, family members or other stakeholders, and individuals served. A key goal of this program is to enlist passionate advocates outside the GA team in the organization's ongoing grassroots public advocacy work. Grassroots advocacy work is a key tool for our organization, given the amount of dollars Boundless receives from Medicaid and other governmental sources. Members of this group will be incorporated into advocacy and governmental affairs projects and will be provided opportunities to directly engage in these efforts.

The Boundless Advocates will be the primary "grassroots" arm of Boundless' GA work. There is strength in numbers, and the power of a group goes further when their message is well coordinated and consistent. Membership in this group is voluntary, and while this group's work may be organized by Boundless, members of this group will be partaking in this work as private individuals. All members of this group will have a relationship with Boundless, but the organization is not paying them or incentivizing them to advocate on behalf of the organization.

Boundless Advocates will be provided training and education on how to engage in grassroots advocacy, be provided with up-to-date information and communication about key policy decisions being considered or current proposed budget priorities, and be provided with information or guidance on how to directly engage with supporting or opposing a specific initiative. Opportunities for such engagement may include letter or email writing, phone calls, legislative visits, and providing written or in-person testimony to the legislature.

With the size of Boundless today, Boundless should strive for hundreds of communication touch points with lawmakers and key decision makers annually via

the GA team, hired lobbyists, professional trade group participation, and the Boundless Advocates. Boundless Advocates will expand as the organization grows. Grassroots advocacy through Boundless Advocates is a key component of the public policy process, and it is a strategy that will be employed throughout the Boundless network, both within Ohio and beyond.

Section II, Part G: Partnership and Relationship Building

While Boundless will implement its own GA strategy, it is important that Boundless both utilize existing partnerships and forge new ones to achieve our policy goals. While Boundless is a large organization, collective action, especially regarding the state biennium budget and relevant federal priorities, is needed to achieve the best possible outcome. Boundless will ensure all potential partnerships are evaluated to ensure there is significant priority alignment. As the organization grows, the need for partners in other states and regions of the country will become more necessary. Additionally, as the organization expands its service offerings (primary care, ageing services, etc.), it will be important to be connected with groups that specialize in those policy and advocacy areas.

It should be clearly noted that partnership is not equal to unanimous agreement. Boundless always retains the right to state its own position on key issues, especially if Boundless strongly disagrees with a key partner's view on a particular issue. To best ensure continued partnership, the GA Team will always notify partners in advance and seek to identify points of agreement or nuance prior to declaring an opposing view of an issue.

Some of Boundless' key partners include:

- OPRA (Ohio Provider Resource Association)
- ANCOR
- The National Council for Mental Wellbeing
- Franklin County Human Services Chamber
- Franklin County Board of Developmental Disabilities
- Cuyahoga County Board of Developmental Disabilities
- The Ohio Council of Behavioral Health & Family Services Providers
- Ohio Child Alliance

Section II, Part H: Metric Reporting and Monitoring

As the Boundless GA Team undertakes its work, several key metrics will be tracked:

- Priority Metrics
 - Number of members in the Boundless Advocates Program
 - Number of staff members enrolled
 - Number of family members enrolled
 - Number of individuals enrolled

- Number of board members enrolled
 - Number of community members/ other stakeholders enrolled
 - Number of Legislative Districts Boundless Operates Within
 - State House Districts
 - State Senate Districts
 - US Congressional Districts
 - US Senate Seats
 - Number of Communications touch points with Legislators/ Elected Leaders
- Supplemental Metrics
 - Number of Testimonies Given (Both in Person and Written)
 - Total Amount of Dollars Awarded tied to GA activities
 - Number of Partners
 - Total Number of Hours Spent Directly Advocating for our Services
 - Total Number of Advocacy Touchpoints by Elected Official (In Person Interactions, Targeted Letters Sent)
 - Total Number of Lobbying Hours Undertake by Boundless Staff Members
 - Issues and Legislation the Organization has Declared a Formal Public Position

These metrics will be reported to relevant stakeholders, including the Executive Team, The Board, internally to staff, and externally as needed for promotional purposes. All metrics shall be reported in a final report or annual report of Boundless' GA work.

Section III: Defining the Future and Prompting Organizational Success

Section III, Part A: Organizational Growth and Government Affairs Work

As Boundless continues to grow, there are multiple opportunities the organization can undertake to expand our GA work and scope. Below are several of these potential options.

- Advocacy for Ageing Services: This is an advocacy area in which Boundless can and should expand our advocacy footprint. The baby boomer generation is the largest group of retirees in the history of the United States. Ageing services are increasingly becoming harder to access for older Americans. The challenge is even more pronounced for older adults with IDD. As individuals with IDD age, they will need care and support for their IDD diagnosis and specialized elder care. Funds will be needed to provide these services, which can come from the state government. It is recommended that policy analysis and recommendations for supporting this population be drafted.
- A Regular Schedule of Events or Tours for Elected Officials/ Community Leaders: These are events that can be held while the legislature is in session in Columbus, or other locations with a large concentration of elected leaders. These types of events allow Boundless to increase brand and services awareness, while showing appreciation to elected leaders. Hosting events and tours allows Boundless to continue to foster relationships with key decision makers, while showing the

geographic reach of our organization. It is recommended that a calendar of hosted events and site tours be created and that funds for this be incorporated into the Boundless annual budget.

- Establishing a Boundless Political Action Committee (PAC): A PAC would allow us more flexibility when directly supporting candidates. Political contributions to campaigns must come from individuals directly or PACs (which are donated to by individuals directly). Boundless, as a non-profit organization, cannot endorse or contribute to any political campaign, regardless of how aligned the candidate's priorities are with the work Boundless does. Establishment of a PAC would create a bank of funds to use on supporting those candidates whose policies and priorities promote the work and mission of Boundless. Boundless could encourage PAC donations from staff, family members, donors, and other stakeholders, if they indicate they would like to receive this information. Establishment of a PAC could be an effective tool in growing the impact of Boundless' advocacy, especially outside the state of Ohio. It is recommended that Boundless explore the costs/ benefits of establishing a Political Action Committee.
- Civic Engagement Education and Training for Staff: Elected officials will often say that engagement from individuals impacted by a policy or funding decision directly is the most effective form of connection and advocacy. Personal stories and examples are the most powerful tool Boundless has to influence decision makers. Educating staff on the importance of advocacy and civic engagement can enhance our organization's impact and reach. The Boundless workforce (3,000+ individuals) makes up a large group of voters. Educating them on the importance of engaging in the political process and providing opportunities to do so can have a positive grassroots impact on advancing the priorities of the organization. These types of activities include civic education, voter registration, etc. It is recommended that the GA team collaborate with the People & Culture and Communications team to create civic engagement training and opportunities for staff.
- Creating a Statewide and National Model for HHS Legislative Advocacy: Throughout this process it is incumbent upon us to evolve the organization's GA model to ensure it is reflective of an organization of Boundless' size and reach. As a recognized leader in this space nationally, Boundless has an opportunity to inform how providers across the country engage in the policy process. The goal of Boundless' GA work should always be to be inside of the decision curve, informing policy decisions versus reacting to policy decisions. As Boundless continues to grow both in geographic and service range, it is critical that the organization continue to build an effective GA team and operation that can meet the demands of the modern political environment.

Section IV: Reports & Addendums

Section IV, Part 1: Current Analysis

This section will be updated semi-annually (July & January) with relevant information and analysis of potentially impactful elections, laws, and administrative rules.

Section IV, Part 2: Governmental Affairs Annual Report

This section will be updated annually (January, covering the prior year) with a report of the work and impact of Boundless' Government Affairs work, including a report on the key metrics defined in this plan.