

The IDD agency growth blueprint

Strategy. Systems. M&A.

Giv. x **ANCOR**



Introduction

Giv x CFHS

Throughout this guide, you'll find direct quotes and transcripts (edited for clarity) from our ANCOR 2025 breakout sessions—featuring insights from Stacy DiStefano and Judy London, two experts who've led organizations through rapid growth, strategic pivots, and system-wide transformation. Stacy is the founder and CEO of Consulting For Human Services (CFHS)—a national advisory firm known for its deep expertise in IDD, mental health, substance use disorder, and digital strategy. CFHS is widely recognized as a leader in nonprofit mergers and acquisitions, offering end-to-end support from strategic planning to post-close integration. Stacy brings over three decades of leadership in the field, including roles as COO of Open Minds and VP of Innovation at Resources for Human Development. Judy, formerly the Chief Strategy Officer at a large IDD provider, now serves as a principal consultant at CFHS, where she helps organizations scale through data-driven growth and operational excellence. Giv is a proud sponsor of CFHS in our shared mission: helping IDD agencies grow, adapt, and navigate an increasingly complex care environment.

Leaders of IDD agencies are facing a critical moment. Demand for community-based services is rising, driven by an aging caregiver population and ongoing deinstitutionalization efforts. At the same time, agencies are navigating severe staffing shortages, growing waitlists, and financial pressures—all while Medicaid remains the primary funder of long-term services and supports.

This eBook offers guidance to help IDD agency leaders grow with purpose. We'll explore proven strategies—like building scalable infrastructure, maximizing Medicaid revenue, and tracking measurable outcomes—while acknowledging that funding models, waiver rules, and compliance expectations vary by state.

Across the country, policymakers are increasingly tying funding to outcomes, not just services. States are testing value-based payment models, and more are integrating IDD services into managed care. Agencies that prepare now—by improving systems, empowering staff, and aligning services with individual goals—will be best positioned to thrive.

The following chapters offer a roadmap to help your agency grow stronger, smarter, and more sustainably—no matter what your starting point may be.

“Metrics-based management is where agencies need to be operating. I’ve been in this field for 30 years. We used to rely on folders, pens—black ones, not red, for compliance!”

- Stacy DiStefano Chief Executive Officer Consulting for Human Services

Chapter 1

Strategies to grow and scale IDD agencies

True growth in IDD services involves expanding support while maintaining sustainability and quality. Agencies that grow well tend to invest early in scalable systems, strong teams, data-driven planning, and community relationships. These foundations help ensure quality and person-centered care remain intact as operations expand.

Workforce capacity and retention

No growth strategy works without a stable team. High DSP turnover and workforce shortages are major barriers nationwide. Agencies should strengthen onboarding, offer career pathways, and provide ongoing training. Strong supervision, mentorship, and internal leadership development help staff stay engaged—and give your agency the talent it needs to scale.

Scalable systems and technology

Manual processes may work for small teams—but they rarely scale. Growth-oriented agencies replace paper and spreadsheets with centralized systems for documentation, scheduling, and billing. Real-time tools like EHRs and EVV systems help staff document as they work, reduce errors, and save time. While discussing the technology changes over time and the need to adapt Stacy mentioned: “Metrics-based management is where agencies need to be operating. I’ve been in this field for 30 years. We used to rely on folders, pens—black ones, not red, for compliance! We’ve evolved. Now it’s about having strong systems. No matter the size of your organization, sustainability requires a good tech stack. It should cover clinical operations, data, IT, revenue cycle, back office, compliance—everything. A good system is no longer a luxury; it’s table stakes.”

Leaders should regularly assess whether their technology is keeping up—and invest where needed to support long-term efficiency. The more integrated your systems, the more confidently you can grow.

Building partnerships and staying mission-focused

Growth doesn't happen alone. Collaborate with peer agencies, funders, community partners, and advocacy groups to expand services and share solutions. Even if you're not ready to act on an idea today, making space for those forward-looking conversations helps keep your agency adaptable and prepared.

As you grow, stay grounded in your mission. Make sure new services reflect the needs and choices of the individuals you serve. The strongest agencies scale with intention, growing not just in size, but in measurable impact.

Using data to guide growth

Data allows agencies to make smarter decisions and demonstrate their value. Tracking key metrics—like service utilization, incident trends, and goal progression—helps identify gaps, guide resource allocation, and prepare for outcome-based funding. When discussing data and how crucial it is for growth, Stacy Distefano shared: “Metric-based management is really the way folks should be operating at a high level right now.” The more integrated your data, the more confidently you can expand. When agencies use data not just for compliance, but for strategy, they're better equipped to scale with purpose and precision.

Interview with Stacy DiStefano

Session title: Designed for Expansion | Interviewed by: Danny Laneri VP of Business Development at Giv

Danny Laneri:

Let's pivot to data and systems. What tools or systems are having the biggest impact on agency growth?

Stacy DiStefano:

Metrics-based management is where agencies need to be operating. I've been in this field for 30 years. We used to rely on folders, pens—black ones, not red, for compliance!

We've evolved. Now it's about having strong systems. No matter the size of your organization, sustainability requires a good tech stack. It should cover clinical operations, data, IT, revenue cycle, back office, compliance—everything. A good system is no longer a luxury; it's table stakes.

Danny Laneri:

And for those who are expanding—whether through merger or organic growth—how can agencies prepare to integrate different operating systems?

Stacy DiStefano:

That's part of the upfront diligence. Even if you're growing organically, you need to assess your current capacity. If you were building an addition onto your house, you'd want to know the foundation is strong enough.

Chapter 2

Optimizing Medicaid reimbursement and reducing revenue leakage

For most IDD agencies, Medicaid is the primary source of funding—which makes it vital to capture every dollar you've earned. But many agencies lose revenue due to billing errors, incomplete documentation, or missed claims. Tightening your internal systems ensures funding keeps up with the care you deliver.

Avoid common pitfalls

Errors like missing time entries, incomplete notes, incorrect codes, or noncompliant EVV logs can lead to denials or recoupments. Claims that sit unsubmitted—or go to the wrong payer—may fall outside billing windows and become unrecoverable. Agencies should regularly audit documentation, catch small issues early, and train staff to avoid common mistakes.

Build stronger documentation habits

Good documentation starts with clear expectations. Staff should know what Medicaid requires for each service—and be trained to write notes in real time whenever possible. Standardized forms and prompts (within EHRs or mobile apps) can make a big difference, helping staff capture the right details to justify each claim. As Judi explained: “If your billing is not right, if you're missing codes and bills are going out, getting denials—that contributes to a bad financial situation.” Strong documentation habits protect both care quality and financial health. Agencies that invest in training and tools up front are better equipped to avoid denials, shorten reimbursement cycles, and stay audit-ready.

Leverage technology for accuracy and speed

Modern billing systems can flag missing information before a claim is submitted, track claims status in real time, and match services to the correct payer. Automation doesn't replace staff—it reduces repetitive tasks and catches errors before they become costly. Agencies that invest in tech often see faster payments and fewer denials.

Monitor and improve continuously

Reimbursement isn't set-and-forget. Agencies should regularly review denial rates, billing cycle times, and authorized vs. delivered hours to spot trends and plug leaks. Even a small bump in utilization or claim accuracy can add up to thousands of dollars annually. Tracking these metrics ensures financial health—and gives your agency room to grow.

State policies vary, so make sure your team stays up to date on local Medicaid rules, waiver programs, and EVV platforms. The goal is simple: get paid for the care you've delivered—and use those funds to reinvest in your growth.

Interview with Judy London

Session title: Unlock Your Next Stage | Interviewed by: Danny Laneri VP of Business Development at Giv

Danny Laneri:

You've talked about alignment and people. What about data—where does that fit in?

Judy London:

Data's huge. Everyone says they need data, but sometimes they don't even know what's missing.

Data allows you to understand what's happening inside your organization. You need to cross-reference data—compare departments, look for gaps, and ask, "How do we know if this is working?" But the real challenge is: can we trust the data? There's nothing worse than a report where someone says, "That number's wrong." It undermines everything.

You need:

- Solid data infrastructure
- Clear agreement on what data to collect
- Consistent processes
- Tools that reduce duplication and human error

And you need buy-in from the whole team.

Danny Laneri:

That's so true. And it starts with good capture—billing, documentation, transportation, payroll. It's a mixed bag across agencies. So what would you say are the four most important areas of data to assess?

Judy London:

Great question. Top four:

1. **Financial Data:** I mean, certainly, you have financial data which is critical. If your billing is not right, if you're missing codes and bills are going out, getting denials—that contributes to a bad financial situation.”
2. **Operational/HR Data:** Tracking your operations, and the people part. Who's coming to work? How many workers do we have? Are we recruiting enough people? Are we retaining enough people? How long are people staying? Are internal promotions important to us? And if so, we need to track that and talk about it.
3. **Quality Data:** Certainly, quality data is in there. Falls, treatment and medication, that was missed and what's all happening there? How have changes we've made changed the outcome, or changed the data that we're tracking?
4. **Marketing/Referral Data:** I'm a marketing person by trade, so for me, marketing is looking at our referrers. Who's sending us, not the most, the best referrals? Who's sending us the clients who we can say yes to the fastest, or the most appropriate for our services?

“But what got you here today is not what will get you there tomorrow. We’re in a very different environment—not just politically, but structurally. The nonprofit landscape is changing. There’s more private equity activity, and more mergers and acquisitions.”

- **Stacy DiStefano** Chief Executive Officer Consulting for Human Services

Chapter 3

Data-driven strategic planning and agency growth

To grow sustainably, IDD agencies need more than a vision and goals—they need a plan. Data-driven strategic planning helps agencies align growth with actual needs, performance gaps, and capacity. It turns aspirations into action by using real evidence to set priorities, track progress, and adapt.

Start with what you know. Before charting a path forward, agencies should examine their current state using internal data:

- What’s your service utilization rate?
- Where are you seeing staff shortages or high turnover?
- Which programs are consistently over or under capacity?
- Are certain teams or locations outperforming others?

These performance indicators provide a baseline. When paired with external datasets—such as regional waitlists, demographic shifts, or policy forecasts—they help agencies identify unmet needs, emerging risks, and growth opportunities.

Set goals you can measure

Data turns vague goals into clear targets, for example, “Expand day services by 12% by Q4 to meet regional demand,” which is backed by waitlist and referral data. Track progress through dashboards and regular reviews. Keep teams aligned by making data accessible and actionable.

Validate needs with both voices and evidence

Listening to individuals, families, and partners is essential—but pair it with data to guide decisions. If families request weekend respite, review usage data and staffing capacity before expanding.

Forecast capacity before you grow

Use data to model costs, staffing needs, and Medicaid reimbursement before scaling. Smart growth accounts for financial and operational realities.

Plan to adapt

The IDD landscape changes fast. To keep up, agencies need to build flexibility into their strategy—so they can pivot without losing momentum. Set quarterly data reviews to evaluate progress, spot trends, and adjust your plan as needed. As Stacy DiStefano noted: “What got you here today is not what's gonna get you there tomorrow.” Sustainable growth isn't about sticking to one plan—it's about staying responsive. The more you treat planning as a living process, the better equipped you'll be to navigate change and lead with confidence.

Interview with Stacy DiStefano

Session title: Designed for Expansion | Interviewed by: Danny Laneri VP of Business Development at Giv

Danny Laneri:

What are some of the most common pitfalls you see when agencies pursue expansion—and how can they avoid them?

Stacy DiStefano:

Great question. The most common pitfall? Not thinking about it at all. A lot of agencies have been around for decades, have strong community ties, donors, and followers. They think: “We're fine the way we are.” But what got you here today is not what will get you there tomorrow. We're in a very different environment—not just politically, but structurally. The nonprofit landscape is changing. There's more private equity activity, and more mergers and acquisitions.

Chapter 4

Data-driven strategic planning and agency growth

Scaling an IDD agency is exciting—but complex. As agencies grow, leadership, program offerings, and quality systems must grow with them. That kind of growth only works when everyone is aligned. Or, as Stacy DiStefano put it: “Everyone needs to be rowing in the same direction. If your board and leadership aren’t aligned, growth becomes chaos instead of progress.” Without that alignment, growth risks becoming unsustainable.

Leadership is where it starts. Agencies need a strong foundation—managers who can lead programs, supervise teams, and adapt through change. Succession planning, leadership development, and shared decision-making structures help spread responsibility and prepare the agency for expansion. From executive directors to frontline supervisors, leaders at all levels need support to stay focused on quality while juggling increased demands.

Diversifying services can strengthen your mission and stability. Agencies that offer complementary programs (e.g., combining residential with employment or in-home support) can better meet community needs and adapt to policy shifts. It also protects your organization financially: if one funding stream slows, others may carry the weight. But expansion should be intentional. Evaluate the demand, capacity, and quality standards before launching something new. Start small, measure results, and scale thoughtfully to avoid stretching staff or systems too thin.

Growth should never come at the cost of quality. As programs multiply and staff increases, agencies must invest in consistent training, strong supervision, and clear quality assurance systems. Outcome tracking, client satisfaction data, and internal reviews help keep services aligned with expectations. Quality isn’t just about avoiding mistakes—it’s about protecting your brand. A strong reputation for high-quality, person-centered care helps with referrals, funding, and community trust.

Operational systems matter too. If you're still relying on manual intake processes or outdated billing, inefficiencies will multiply with growth. Upgrading technology and streamlining workflows early can save time, reduce errors, and support better outcomes. Investing in scalable infrastructure now—like cloud-based documentation tools, data dashboards, or integrated billing systems—makes it easier to grow without chaos.

In the end, sustainable scaling is about staying grounded. The best agencies grow with purpose, building capacity and reach while staying centered on quality and mission. Sustainable growth has a ripple effect—improving not only your agency’s operations but also the quality of care for individuals and families.

Interview with Stacy DiStefano

Session title: Designed for Expansion | Interviewed by: Danny Laneri VP of Business Development at Giv

Danny Laneri:

Now shifting gears a little bit back toward leadership, how should an agency adjust or structure leadership to prepare for expansion or a merger and what qualities would you say are most important for them to have in that process?

Stacy DiStefano:

Yeah, that’s a tough one—because the team you have may not be the team you need for growth. Some individuals prefer stability, and that mindset won’t guide your next chapter. You need to assess your leadership: Are they growth-ready? Are they open to change? Have you helped them understand the why behind it all? It’s not growth for growth’s sake—it’s about mission, impact, and sustainability. Everyone needs to be rowing in the same direction. If your board and leadership aren’t aligned, growth becomes chaos instead of progress.

“Every team has its clever fixes—the spreadsheet, the sticky note, the one supervisor who remembers everything. But as your agency grows, those workarounds become liabilities.”

- Stacy DiStefano Chief Executive Officer Consulting for Human Services

Chapter 5

Operational efficiency as your growth engine

When agencies think about growth, they often focus on expansion—more programs, more locations, more individuals served. Growing your impact starts with improving how the work gets done.

Operational efficiency is the engine that drives lasting, scalable progress. When your systems work smoothly, your team has more time, less stress, and greater capacity to grow.

Streamlining workflows allows agencies to serve more individuals without increasing burnout or administrative overload. Inefficiencies in documentation, scheduling, or billing don't just waste time—they create bottlenecks that stall growth. By tightening these systems, agencies unlock resources they didn't realize they had.

Start with documentation. Real-time, digital note-taking tools save hours of paperwork each week. Instead of completing notes after a shift—or worse, days later—staff can log services on the go. That not only improves accuracy and compliance, but also frees up valuable time. Agencies that adopt mobile-friendly, intuitive documentation systems report higher staff satisfaction and lower error rates.

Next is scheduling. Many agencies still rely on spreadsheets or paper calendars to manage shifts. That approach doesn't scale. A visual, centralized scheduler helps supervisors assign staff more quickly, reduce overlaps or no-shows, and track availability in real time. Smarter scheduling leads to better coverage, less overtime, and fewer last-minute scrambles—creating a more stable environment for staff and individuals alike.

Then there's billing. Manual claims processes can drain hours from your admin team—and every mistake costs money. Automated billing tools that pull directly from service documentation reduce denials and ensure claims go out on time. But, as Stacy DiStefano warns: “Every team has its clever fixes—the spreadsheet, the sticky note, the one supervisor who remembers everything. But as you grow, those workarounds become liabilities.” Agencies that switch from manual to integrated billing workflows often recover thousands in missed reimbursements and significantly reduce their accounts receivable backlog. Scaling smart means leaving behind the patchwork—and building systems that grow with you.

Scaling without efficiency leads to burnout. If your systems don't evolve with your services, your team will feel it—through longer hours, higher stress, and increased turnover. Agencies that grow intentionally start by shoring up the foundation. They ask: Are our systems helping us scale—or holding us back?

Operational efficiency should never include cutting corners, it's about creating the conditions for your team to thrive. When your workflows are smooth, your capacity expands. That's how you grow—with clarity, control, and confidence.

Interview with Stacy DiStefano

Session title: Designed for Expansion | Interviewed by: Danny Laneri VP of Business Development at Giv

Danny Laneri:

Let's pivot to operations for a moment. We know that a lot of agencies have built workarounds over the years—things like paper processes or spreadsheets—but those don't always scale well. What's your take on how agencies should be thinking about operational systems as they grow?

Stacy DiStefano:

Every team has its clever fixes—the spreadsheet, the sticky note, the one supervisor who remembers everything. But as your agency grows, those workarounds become liabilities. Because the supervisor that knows everything goes on vacation. Or they retire. Or they burn out. And then you realize the system never really existed—it was just a person. That's why you have to formalize. That's what allows you to grow. If you don't, those clever fixes that once saved you time eventually start costing you.

Chapter 6

Building strong connections— funders, families, and your local ecosystem

Growth doesn't happen in a vacuum. The most successful IDD agencies grow by building strong, intentional relationships—with state and local partners, advocacy groups, families, and the wider community. These connections unlock resources, expand visibility, and create a network of trust that sustains growth over time.

Partnering with state agencies and county boards is foundational. These relationships influence funding, referrals, and policy engagement. Agencies that share outcomes, participate in advisory councils, and stay aligned with state priorities are more likely to earn support—and stay ahead of regulatory changes. It's also a chance to co-advocate for funding or policy updates that benefit everyone.

Just as critical are relationships with advocacy organizations. Groups like ANCOR, self-advocacy networks, and family coalitions can help amplify your agency's mission, offer valuable feedback, and strengthen your voice in the broader disability community. Showing up, staying engaged, and collaborating on initiatives helps build credibility and visibility with both families and funders.

Families and guardians are at the heart of everything. Their trust can make or break your reputation. When an audience member asked: "With such a large focus on balance sheets and profit and loss statements, what should we do to build a brand within the community?" Stacy responds: "When the people you serve and their families experience consistent support, they really don't care if your logo is a purple butterfly or a yellow star." Agencies that prioritize clear, respectful communication and regularly invite family input build loyalty that leads to word-of-mouth referrals. Small gestures—like proactive updates or involving families in care planning—can go a long way toward building lasting relationships.

Finally, don't underestimate the power of local partnerships. Schools, employers, healthcare providers, and civic groups all play a role in the community ecosystem. Partnering with these groups can create referral pipelines, new service opportunities, or shared training initiatives.

These connections also reinforce your agency's value within the broader community, making you not just a service provider, but a trusted community anchor.

In short, growth is collaborative. By building strong connections rooted in mutual goals, your agency can grow with support, resilience, and visibility.

“If you're gonna grow, you need to make sure the people around you see that destination and understand that their focus needs to be getting you there.”

- Judi London Chief Executive Officer Consulting for Human Services

Chapter 7

Training and retaining your team as you scale

Your team is your growth engine—and when staff are underprepared or burnt out, growth stalls fast. Agencies that scale successfully prioritize onboarding, development, and long-term retention just as much as external expansion. As Judi mentions: “In human services, the agencies that have the ‘people thing’ down are going to thrive. Growth without staff support isn’t growth—it’s burnout waiting to happen.” Sustainable growth means investing in your workforce at every stage. When staff feel supported, trained, and valued, they’re more equipped to deliver quality services—and more likely to stay for the long haul.

It starts with onboarding. A strong start reduces turnover and sets the tone for quality. Structured onboarding—with clear expectations, shadowing, and mentorship—helps new staff feel confident and connected to your mission from day one. As hiring ramps up, consistent systems ensure that every new DSP, no matter where they land, gets the same foundation.

Ongoing training keeps your team growing with your agency. Refreshers on documentation, behavior support, or person-centered planning sharpen skills and signal that you're investing in staff growth. Agencies that offer advancement opportunities—like career ladders or leadership development, retain more talent and build internal leaders ready to step into bigger roles.

Leadership development in all roles is essential—especially as agencies grow. Promoting intentionally (not reactively) helps build a stronger, more stable team. Look for staff who show initiative and equip them early with coaching, feedback, and leadership tools. That's why Judi puts it simply: "It's not just about leadership at the top—it's leadership at every level that keeps the mission moving forward." A prepared supervisor is more likely to lead effectively—and stay—than someone promoted without support. By investing in leadership at every layer, agencies create a culture of accountability, growth, and mission-driven service.

Retention isn't just about training, it also relies on having the right systems in place. Smart scheduling, streamlined tools, and a culture of appreciation all reduce burnout. Staff who feel valued and heard are more likely to stay, refer others, and grow with you. Something as simple as flexible shifts or public recognition can make a measurable difference.

Ultimately, people stay where they feel supported. By building a culture that values learning, growth, and employee well-being, you don't just retain a workforce—you build a team that fuels sustainable agency growth.

Interview with Judy London

Session title: Unlock Your Next Stage | Interviewed by: Danny Laneri VP of Business Development at Giv

Judy London:

A lot of agencies really struggle with growth, they will often say they have too many other things going on. You know, we're bringing in a new EHR. We're doing this, that, and the other thing, and we really can't think about it. So making sure we all know that this is a priority for our organization, and we're all getting ready to go in that direction.

Danny Laneri:

So once you've prioritized growth, you generally have your leadership team aligned—or not even generally, but you are aligned—where do you focus next?

Judy London:

Yeah, people. I mean, nobody does it alone. You know, you can be a great leader, but if people are not gonna follow you, you've got a problem. So, you know, people are—is really—the next step. And that really involves making sure you have, and this is—people talk about this all the time—the right people in the right seat at the right time. But it's so true. If you're gonna grow, you need to make sure the people around you see that destination and understand that their focus needs to be getting you there. And not just at the executive level—equally important throughout the organization.

Are we investing in our team? Are we recruiting well? Are we—and more importantly—what are we doing to retain our staff, to recognize their contribution? Do we have the “people thing” down? In this industry, in this business—right, in human services—people are what really makes the difference. And so, organizations that have the people thing tied up—the people thing down—are gonna thrive. And you have to put a little bit of work into that.

Chapter 8

Navigating mergers and acquisitions as a growth strategy

Growth doesn't always mean building from scratch. For many IDD agencies, mergers and acquisitions (M&A) have become a powerful tool to scale services, expand geographic reach, and strengthen long-term sustainability. But in the nonprofit world, M&A is often misunderstood—surrounded by stigma or seen as a last resort. The way Stacy sees it: “The majority of nonprofit mergers are strategic and happen from a position of strength.”

“What type of organization would add value? Would add strength? Would bring talent? Expand your geography? Broaden your service lines? Whatever you're trying to grow—stick to that. Don't get distracted by the shiny object. It's like going to open houses in a high-rise when what you really want is to live in the country.”

- Stacy DiStefano Chief Executive Officer Consulting for Human Services

Changing the narrative around M&A

On the for-profit side, mergers are celebrated as a sign of success. But for nonprofits, acquisitions can trigger fear—among staff, board members, or the community. Mergers, affiliations, and asset transfers can help agencies preserve mission, expand access, and build resilience in a rapidly changing care environment. Start by initiating open conversations before a crisis forces them. Talk with your board, leadership, and key partners about what a strategic partnership might look like—before you need one.

Clarity creates confidence

Before exploring any potential partnership, agencies need to get clear on what they're looking for. What would a strong partner bring to the table? What kind of culture, services, or footprint would complement your own? This is where discipline matters. “It's like buying a house,” Stacy says, “If you've decided you want a three-bedroom ranch in the country, don't waste time looking at high-rises in the city.” Whether you're expanding geographically, looking for leadership succession, or filling service gaps, the best outcomes happen when your agency defines success up front—and sticks to it. That's the foundation for a meaningful, not just functional, match.

Culture first, numbers second

Mission alignment is non-negotiable. While private sector deals may revolve around financials, nonprofit M&A lives or dies on cultural fit. Before you discuss structure, ensure both organizations are aligned on purpose, vision, and values. These changes towards growth can lead to some difficult decisions and changes, as Stacy advises: “The team you have may not be the team you need. Some folks just want stability and the status quo. That's not who will lead your next chapter.” To grow successfully through a merger, you need leaders—and staff at all levels—who are open to change and grounded in the mission.

That's why it's essential to bring people into the "why" early. When staff understand the purpose of the transition, and how it improves care and strengthens the mission, they're far more likely to become champions of the process, not critics.

Structuring the deal

Unlike in private equity deals, nonprofit M&A typically involves a change in board control, not a sale. That doesn't mean there aren't costs—legal, diligence, integration. Agencies should prepare for the time and effort involved and build those costs into their growth strategy. In some cases, asset transfers (such as programs or facilities) may be more appropriate than full mergers. These models allow agencies to integrate key services without overhauling governance structures.

Success in practice

CFHS-supported integrations show what's possible when agencies grow through alignment—not acquisition. In Ohio, the merger between I Am Boundless and Koinonia Homes created the largest IDD provider in the state. The match worked because of cultural fit: leadership transitions were handled with care, teams were mentored across organizations, and each agency brought complementary strengths to the table.

In Maine, three smaller providers—none larger than \$20M individually—are combining to form a \$35–38M agency. Their goal: streamline operations, expand geographic reach, and reduce duplicative overhead. By setting ego aside and focusing on what's best for the individuals they serve, these leaders are demonstrating what sustainable, values-driven growth can look like

Interview with Stacy DiStefano

Session title: The M&A Blueprint | Interviewed by: Danny Laneri VP of Business Development at Giv

Danny Laneri:

That's actually going to be a good segue into our next question. And that's essentially what are some of the key factors that agencies need to consider when considering a partner or a merger or acquisition, but specifically a partner there. What are some of the key factors?

Stacy DiStefano:

Yeah, absolutely. In some ways, it's kind of like buying a house, right? I've likened this to real estate many times when I've talked about M&A. If you sit down with your family and decide that a three-bedroom ranch on a cul-de-sac in the country is the right fit, then that's what your real estate agent shows you.

Stacy DiStefano:

That's what you start looking for. There's a decision-making process that helps you narrow it down and find the best match. You're not going to ask your realtor to take you to high-rises in the city when you've already decided on the country ranch.

It's the same with mergers and acquisitions. What we often find is that organizations need to define the persona of their ideal partner. You don't necessarily need a consultant to do this—though we're happy to help—if you have a focused and disciplined team. Ask yourselves: What kind of organization would add value? Would they add strength, talent, geography, or service lines? Be really clear about what you're looking for.

And once you've made that decision, stick to it. Don't get distracted by the shiny object—an opportunity that's exciting but doesn't align with your goals. Stay disciplined in your search and keep coming back to what matters most: what will truly strengthen your mission and help you grow with intention.

Chapter 9

A growth strategy you can actually act on

A growth plan is only useful if it turns into action. Many agencies write ambitious goals but struggle to follow through. What works better is a clear, flexible plan with prioritized steps, realistic pacing, and space to adapt as your agency—and the environment—changes.

Start by prioritizing your next moves—not everything needs to happen at once. Identify a few high-impact goals that match your agency's biggest opportunities or challenges, whether it's increasing capacity, launching a new service, or improving retention. As Stacy DiStefano shared: “Even if you don't execute on it right away—just knowing you have a plan puts you in a better position as an organization.” Narrowing your focus allows teams to concentrate resources and energy where it matters most. A thoughtful plan—even if it's not implemented immediately—builds momentum and clarity for the road ahead.

“Think of it like a house: if you want to build an addition—whether you’re building it yourself or hiring a contractor—you need to know whether the foundation can support that expansion. It’s the same with organizational growth. Does the infrastructure you have today give you room to scale?”

- Stacy DiStefano

Balance quick wins and long-term goals. Implementing something small but visible—like a staff recognition program or improving scheduling software—can build momentum. Meanwhile, longer-term initiatives like expanding to a new service line or redesigning your leadership structure may take a year or more. Planning for both gives your team early confidence while still working toward lasting improvements.

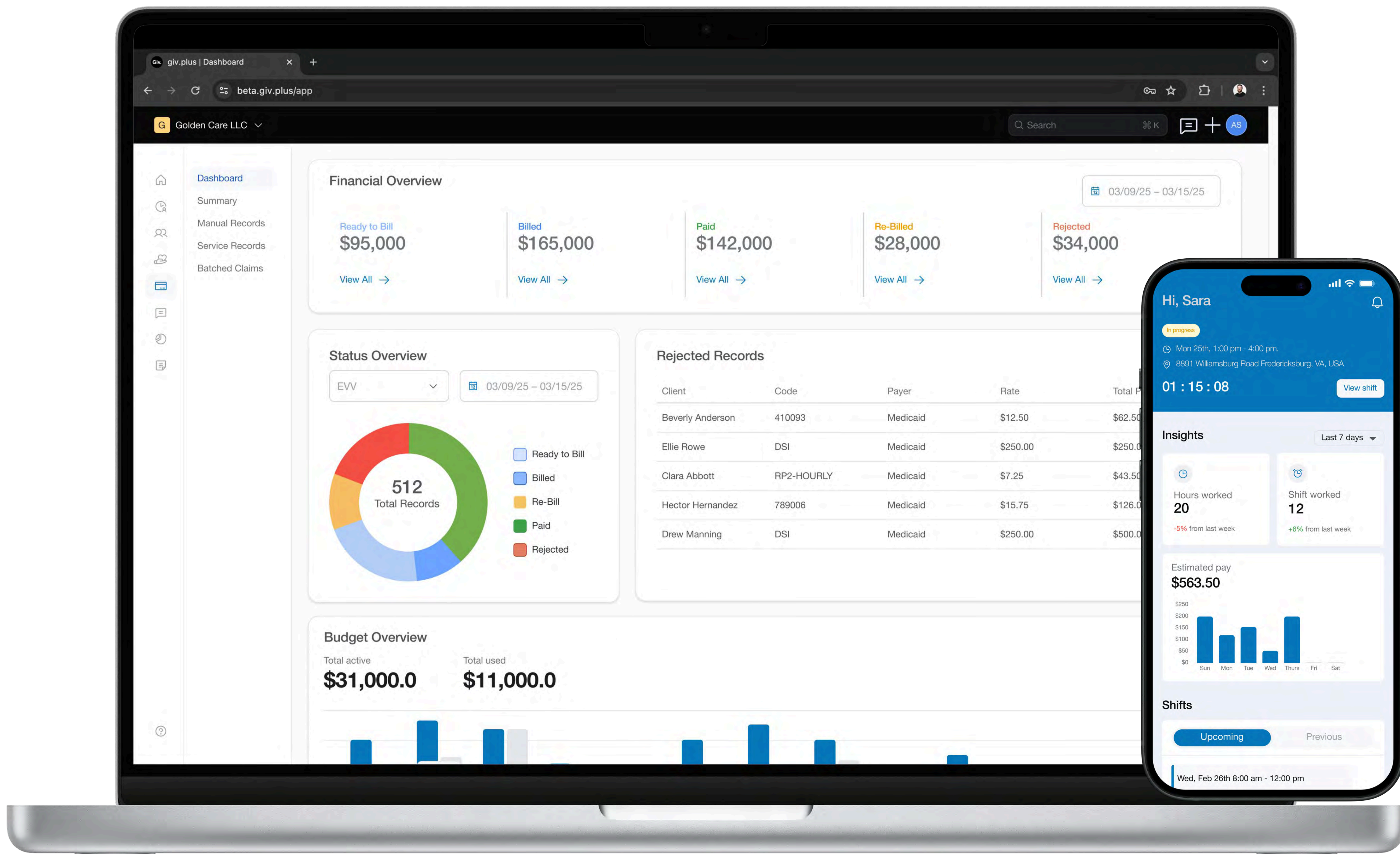
Build a roadmap you revisit. Whether you map out 12 or 36 months, include timelines, owners, and milestones. Most importantly, don’t treat the plan as fixed. Strategic planning should be ongoing. Set regular check-ins to assess what’s working, make adjustments, and track measurable progress.


And finally, don’t rush. In the IDD field, sustainable growth matters more than rapid growth. Expansion that outpaces your staffing, systems, or funding puts individuals at risk—and puts your agency under strain. Growth should enhance care, not stretch it thin. Take the time to build strong infrastructure, train your team, and bring people along.

With a clear focus, a flexible strategy, and a culture that values learning and purpose, your agency can grow in a way that’s both ambitious and sustainable. That’s what long-term impact looks like.

Giv | IDD Software

Every strategy in this guide—from growing your team to preparing for value-based care—depends on the right tools. That's where Giv comes in. Giv is an all-in-one platform built for IDD agencies, streamlining documentation, billing, and compliance so your team can focus on what matters most: the individuals you support.




 Timesheets
Clock In & Out

You have an upcoming shift with Beverly Anderson from 12:00pm - 2:00pm at 255 Summit Terrace.

12:00 1:00 2:00

Jordan Bowen
Beverly Anderson

 Create
Custom Forms
Mileage Report

Purpose built IDD software

Everything in one place.
Custom to your needs.

Giv helps IDD agencies grow by simplifying operations — combining your EHR, eMAR, scheduling, payroll, and billing into one platform so you can expand programs without losing focus on care.

Try out free sandbox features of Giv





A Elevated Consulting Experience

Collaboration. Integrity. Personalization.

Strategic growth takes more than ambition—it takes expert guidance. As the nation’s leading advisor for nonprofit M&A and organizational growth, Consulting For Human Services (CFHS) helps IDD agencies scale with clarity and purpose. With a team of over 60 subject matter experts, CFHS supports agencies through:

Growth Strategy & Planning

From organic expansion to mergers and acquisitions, CFHS helps agencies build tailored roadmaps aligned with mission and capacity.

Leadership & Board Alignment

Growth starts with shared vision. CFHS facilitates alignment across leadership teams and boards to ensure everyone is moving in the same direction.

Operational Readiness

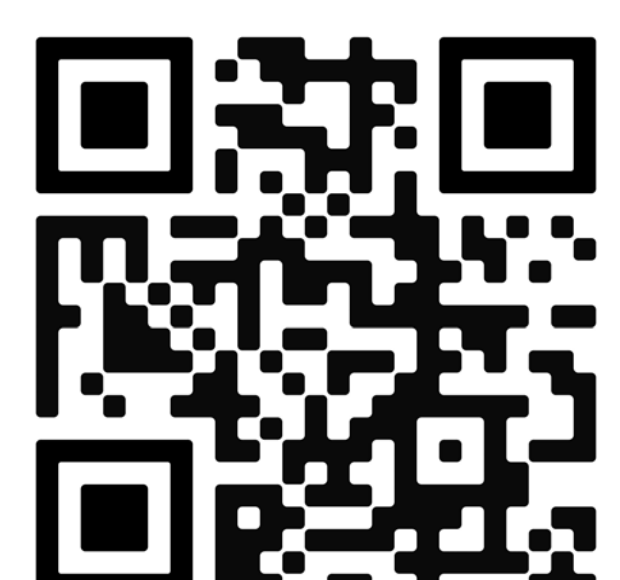
Before scaling, CFHS helps agencies assess and strengthen infrastructure—systems, staffing, compliance, and technology—so growth doesn’t strain your foundation.

Change Management & Integration

Whether expanding services or navigating a merger, CFHS supports smooth transitions with clear communication and a focus on culture.

CFHS doesn’t just offer advice—they walk alongside agencies as true partners in transformation. Learn more at consultingfhs.com

Learn more about CFHS





Learn more at Givhealthcare.com

How should leadership be structured for agency growth?

“You need to assess your leadership: Are they growth-ready? Are they open to change? Have you helped them understand the why behind it all? It’s not growth for growth’s sake—it’s about mission, impact, and sustainability. Everyone needs to be rowing in the same direction. If your board and leadership aren’t aligned, growth becomes chaos instead of progress.”

- **Stacy DiStefano** Chief Executive Officer Consulting for Human Services

