

## **Harmonia CEO and Service Report 10/16/24**

### **CEO Report**

*-submitted by Valerie Nowak, CEO*

Consulting/Vendor Update:

Magellan Group

- September report attached.

Incept

- Digital Recruitment Campaign
  - Considering adjustments to geofenced locations to attract new areas. Considering a new campaign to reach established professionals in private practice.
- Web re-design
  - Grant application submitted to Tower for fall cycle.

Jessica Russo

- Continued monthly posts as per contract.
- Supporting recruitment efforts where appropriate.

Bonadio

- Beverly continues to meet with Paul as needed and use as resource for compliance related direction and support.

Gross-Shuman

- CRS Companies
  - Contact with John "Skip" Cerio
    - No update
  - Emotional Support Animal Letter
    - Our letter (used internally by clinicians) is being reviewed to prevent any potential liability.

ESC

- Monthly meetings began in September. Two meetings held so far and have proved useful in review of current projects, any questions and future endeavors.

Upper Edge Consulting

- Grants report attached.
- Highlight: Awarded \$20,000 grant from OMH for Stigma Reduction project (awarded after monthly report was published).
- Diana Cihak, President of Upper Edge provided additional support at no additional charge regarding our recent lobbying efforts.

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- Annual Report nearly complete. Mike will be acquiring quotes for print/mail.

QI Folio

- Laura continues to explore the system and continues to spearhead. She introduced Leadership at last meeting and QI Folio provided initial training for potential users.

Foundation - Building:

- Derby roof replacement and building repairs – NYS DOH Facilities grant. Awaiting response.

- \$17,000 cost for pump and line work done. The contracted company needed to return to remediate an ongoing issue. Final payment of ~\$7,000 sent.
- Building:
  - Val met with West Seneca Chamber of Commerce on 9/30. Discussed Phase II and Phase III plans for growth and expansion and what type of space we may need.
  - Vision and Planning Committee continues to meet every other week. Focus at present is on tactical strategies to overcome current challenges and fiscal distress.

#### Other business:

- Fall update letter sent to over 100 foundations, local and town legislators, and other supporters.
- 10e11 contract: Greg, Michelle, Laura and Val met for final review and determine approach. Plan is to ask for a 1 year contract, with cost reduced by \$27,000 (set up fees and annual fees for modules purchased for last contract that do not work). Bob Kirbis from 10e11 will be on site 10/30 to discuss contract.
- Budget process: Michelle and Greg provided budget training to all Leaders on 10/1. Budget planning meetings with each leader begin w/o 10/14.
- Val has begun contact with local leaders and legislators to state Harmonia's case and request gap funding. Michelle and Greg worked hard to create a model to determine financial need. There are a number of assumptions made based on ability to hire and file clean claims. The model shows \$282k in working capital needed through next August. Given the model is aspirational and has a 38% confidence interval; the ask is \$750k to account.
  - 10/7 Assemblyman DiPietro, 10/11 Assemblyman Rivera, phone call with Commissioner O'Brien, meeting with staffer from Senator Gallivan's office on 10/15, contacted by Congressman Langworthy's office and provided information.

#### Mental Health:

*-submitted by Laura Spencer, Dir of MH Clinics*

#### Clinic Updates:

- We have had the good fortune to have hired a new MH Programs manager, Timothy Arent, who will start on Oct 21. Tim is a CASAC, a permitted MHC and a professor at D'Youville.
- Interviewing continues – we have hired an additional clinician for Hamburg but are still looking to expand both sites. We would like to have four more clinicians at Derby and six for Hamburg.
- 918 clients; 3 prescribers, 7 clinicians, 2 interns; 3 externs (practicum students); two clinicians are ready to start as soon as limited permits are activated.
- The Schools Programs manager has established an MOU with Silver Creek, we are waiting for the State to approve a satellite clinic at the high school there; we are also meeting with North Collins and East Aurora in the coming weeks.

#### Clinic Regulations and Compliance

- OMH completed their recertification audit on Sept 6; our follow up meeting with them on Sept 26 was very positive. We are still waiting for the full written report and will then develop the PIP
- Dawn Ferguson, consultant:
  - **Status:**
    - Chart Audits continue; Dawn will also be clinically supervising LMSWs and MSW intern.

#### Value Network:

- There is still a delay on most metrics; unclear when they will arrive.
- 2023 payment for Highmark contract for \$1,630. Far less than previous years. Metric achievement down across the network.

#### OMH QIC (Quality Improvement Collaborative)

- School Satellite Project selected
  - OMH is releasing a new Program which will enhance billing APG rates based on School Satellite Improvement metrics. More to come soon!

#### CCNY data/Dashboard Project:

- Review of dashboard data has led to reevaluation of how we view clinician metrics; Clinic Director has asked for clinician input and is using QI Folio to update process and reporting – we are waiting until the 1<sup>st</sup> of the year to fully implement this but will run this simultaneously with our current system in the 4<sup>th</sup> quarter for comparison

#### Growth Opportunities:

- In-School Counseling Program, “Turn-It-Around”:
  - On-site services are provided 2 days per week at Lake Shore High School by 1 clinician; one more day to be added this fall.
  - One Day to be added in Silver Creek (MOU signed)
- OMH grant was submitted to reduce stigma in rural population; plan is to do this through school – probably LSHS, possibly Silver Creek – no word on approval yet.
- In-School Counseling Program, “Turn-It-Around”:
  - On-site services are provided 2 days per week at Lake Shore High School by 1 clinician.
  - One Day to be added in Silver Creek (MOU signed)
  - Each new satellite clinic we open will grant us \$20K from NYS to help with start up costs.
- OMH grant was submitted to reduce stigma in rural population, \$20,000 was awarded by NYS; plan is to do this through school – probably LSHS, possibly Silver Creek

#### Health Homes:

*-submitted by Kristy Gasiewicz, HH Program Director*

#### Current Status:

- Referrals were down for September; Kristy has reached out to HHUNY for additional referrals.
- Health Home Plus charts were audited by HHUNY, Harmonia passed with 100% score.

#### Growth Opportunities:

- HH+ Grant-OMH:
  - “Pathways” developed with ROME and Friends of Nite People.
    - Friends of the Night PPL twice/month outreach. Many people stop at the table but don’t qualify for services. They are already linked to treatment with other health homes, they do not have a qualifying diagnosis, or they do not have active Medicaid.
    - Met with Recovery Options Made Easy (ROME) for outreach, ROME did not have any referrals for Health Home this month.

## Senior Services:

*-submitted by Jennifer Gunia, Senior Services Program Coordinator*

### Case Management General Updates

- Jen interviewed by AARP; discussed clients affected by lack of funding for EISEP (expanded in home services for elderly) funding stream
- Hamburg Adult Day slated to close 5/31/25, CM team will be providing ongoing support to town, TBD. Town will be increasing budget line for Harmonia in 2025 to assist.
- 2 Caregiver Assessments for caregivers completed by Case Manager. These assessments determine funding available for adult day care services; in turn this assists the caregivers by providing respite.

### CarePanion General Updates:

- Private pay model ending 10/31-Clients were given options to transition to County or referred out to external services.
- Recruitment continues, difficulty getting candidates. Lost one CarePanion due to another opportunity allowing her to strictly see a single client.
- PCA I Home Care Contract began 4/1. Determined an RN is not needed at this time. Current CMs will assist with twice-annual home visits for CarePanion clients under County contract. Jen will do others out of current case management service area.

### WNYICC:

- Current cases:
  - Community Health Coach: 6 Active
  - Caregiver Program: 1 Active
  - Healthy Ideas: 2 Active
  - Falls Prevention: 2 Active

### Growth Opportunities:

- Grants
  - Exhale (3 yr grant)
    - “Pathways” project meeting held 1-2x per month. 9/19 Session Held at Cradle Beach. Next Session 10/17.
  - Garmen Grant
    - Submitted on 9/3 to expand Caregiver support through campaign awareness, workshops and resources. Determination expected December. Grant will run for 6 months, requested \$25,000.
  - Health Foundation
    - Expand Caregiver support to reduce burnout. Grant will run for one year and the request will be \$40,000 – in process with Upper Edge – awaiting submission.
  - 1115 Waiver
    - Jennifer attended recent “lunch and learns” with WNYICC – reported out in Vision and Planning Committee. Waiting on fee schedule from state to being capacity assessments.

## Compliance/HR Report:

*-submitted by Beverly Eagan, HR and Compliance Specialist*

### Human Resources:

#### New Hires:

- Stephanie Delameter – Revenue Cycle Manager

#### Terminations:

- Oliva Jackson, CarePanion - voluntary
- Karin Seybold, CarePanion - voluntary
- Veronica Smith, Clinician – involuntary termination (expired credentials)
- Cynthia Haist, Clinician - voluntary

#### Open Positions:

- CarePanion (2)  
School-Based Clinician  
Mental Health Clinicans

#### Human Resources:

- ESC
  - Monthly meetings being held to address high-priority items and outstanding projects.
    - Employee Handbook – final stages.
- Recruiting
  - Contacted D'Youville and arranged for an on-campus tabling event for October 23<sup>rd</sup>.
  - Met with UB regarding recruiting opportunities and will be participating in an “Employer Showcase” on October 21<sup>st</sup>.
  - Sent email to Ted Egger at Hilbert to see if we can connect and arrange a meeting with people in placement or their social services program.
  - Our Template for HCC’s offer letter was sent to ESC so they will be issuing our new hire offer letters.
- Preparing for open enrollment next month. Discussing logistics and specifics with ESC.
- Operationalizing the Employee Experience – This process includes the seven stages of the employee life cycle and how targeted activities on the part of the employer can make the lifecycle feel curated for each individual employee as they move along their employment journey.
- HR will be conducting its own eNPS (Employee Net Promoter Score) exercise. We have to set up the process through MS Forms and ensure the responses will be anonymous. This should be completed by mid-October.

#### Compliance:

- Conflict of Interest questionnaires were sent to all employees. The Board has returned their signed statements.
- Registered for Bonadio webinar in November “Protect your Organization from Risk” focusing on fraud and internal control deficiencies.
- Provided training to the board on risk – specifically risk appetite and risk tolerance.



To: Valerie Nowak, LMHC, CEO  
From: Marta Hiczewski MS, Managing Partner  
Greg Hiczewski, Partner  
Date: October 5, 2024  
Re: Status Report – September 2024

**Period Accomplishments – September 2024**

- **Finance –**
  - Budget training
  - 10e11 Contract review
  - Action Plan draft and updates
  - Finance Committee updates
  - Cash forecast development and weekly updating
  
- **MH Programing/Infrastructure –**
  - Recruitment – review Ad Intelligence to support HR function; suggest outreach to private practice clinicians
  - School program – support MCHF grant implementation and school growth, support OMH grant award – outreach to Dean Seneca
  - Native communities – continued outreach and relationship building to JC Seneca and campaign for president
  
- **Marketing & Development –**
  - Social media – support manager
  - Upper Edge Consulting meetings – support grant development – review, edit and redraft
  
- **Senior Services Business Plan –** review grants and make recommendations
  
- **Health Home –** support referrals and grant fulfillment
  
- **Organization Infrastructure –**
  - Priorities Meeting – monthly priorities
  - Vision & Planning Meetings – facilitate planning process; add outreach efforts to Action Plan – begin connections to Assemblymen – create PPT to share with salient points on challenges and barriers in rural and native communities

## Next Period Priorities – October 2024

- **Finance –**
  - Budget development support
  - 10e11 contract discussion & meeting – ensure billing related components are addressed as a priority
  - Cash forecast updates
  - Support Action Plan outreach to Assemblymen and potential funders
  
- **MH Programing/Infrastructure –**
  - Recruitment – support HR efforts
  - School program – media release re school expansion, support OMH Stigma grant award – engage Dean Seneca in process; discussion with MJB & JC Seneca team regarding appropriate time to meet re Seneca Nation opportunities
  
- **Marketing & Development –**
  - CMS – explore connection to Stripe to website Donor page, prepare segmentation strategy for Giving Tuesday and Year-End Appeal
  - Upper Edge Meetings – support process
  - 2025 Garden Party – select date at Legacy on 18 Mile Creek – schedule Garden Party Committee meeting
  
- **Senior Services –**
  - Senior Services Business Plan – support grant concept development and applications
  
- **Health Home –**
  - HH+ follow-up - reach out to St. Mary's Hospital/Clearview Rehab
  
- **Organization Infrastructure –**
  - Priorities Meeting – Action Plan – connect with Derby and Hamburg district Assemblymen and lobbyist to get direction and elevate importance of connections on Harmonia's behalf
  - Vision & Planning – directed by Action Plan
  
- **Strategic Plan –**
  - Schedule 2025-2027 plan development – recommend pushing out planning to Q1 2025 because of effort to address Action Plan tactics

