



life. with balance.

Harmonia Collaborative Care

2022 – 2024 Strategic Plan

Executive Summary

Harmonia Collaborative Care's 2022 - 2024 Strategic Plan focuses on the advancement of the Vision and Mission of the organization. The plan refinement and growth of programs and services, the retention, recruitment and development of staff and board, and the infrastructure components that are necessary to grow and sustain a fiscally sound organization. This plan covers three full years of activity ending December 31, 2024.

A Strategic Planning Team (SPT) was formed to develop the plan. The SPT included , Board members, program leads and key staff and was facilitated by the Magellan Group LLC. The SPT met four times to outline the SWOT analysis, guide the development of the Goals and Strategies and recommend the 2022 - 2024 Strategic Plan for approval by the Board of Directors.

Strategic Planning Team participants:

Valerie Nowak	Howard Martin	Chris Kluckhohn
Suzanne Jasinski	Megan Brautlacht	Kristy Gasiewicz
Michelle Chiappetta	Jennifer Gunia	Cami Kent
Sandy Eschberger	Beverly Eagan	

2022 - 2024 Strategic Plan Goals

Programs & Services: Harmonia programs and services align with our vision, mission and core values supporting community need and meeting desired outcomes.

Our People: Harmonia recruits, retains and develops the people to build organization strength, deliver quality programs and services and support our culture.

Fiscal Viability: Harmonia embraces financial and data-driven growth and sustainability.

Plan Development Process

Phase I – Discover:

In the first phase in the process, the previous Strategic Plan was reviewed and scrubbed for information to support a new SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis, providing guidance in the development of the goals and strategies.

Internal and external stakeholders relevant to the organization as well as those with an understanding of community need and insight into future solutions were interviewed. Board members represented internal stakeholders with a dedication to the mission and organization-wide perspective. External stakeholders included the Oishei Foundation and the Lee Foundation, both with long standing commitments to mental health, general community need and a history of support to those in need. Both foundations have supported Harmonia in the past, but not in a number of years. Stakeholder comments were presented as anonymous Common Themes to respect confidentiality and reduce barriers to acceptance.

Harmonia conducted community needs assessment directed towards Mental Health expansion in southern Erie, Cattaraugus and Chautauqua counties with the objective to increase access to rural and native communities. Key learnings from this report informed the process.

The Common Themes and SWOT provide informed discussion surrounding the needs, challenges and barriers the organization currently faces and those on the horizon, as well as insights into the growth and development opportunities that exist. Additionally, the team engaged in a robust discussion around appropriate size in relation to the key cultural elements that separate Harmonia from other organizations.

Phase II – Build:

The SWOT and discussion provided the foundation for the development of the Goals outlined above and included in the plan. The Strategies and corresponding Tactics build on the theme of thoughtful organic, collaborative and merged growth supported by qualitative and quantitative data, and in line with the importance of preserving Harmonia's culture.

Goals Champions are assigned to each Goal area to ensure focus and administer the successful completion of the Strategic Plan process. The Strategic Plan Resource Requirements layout the human assets required to deliver on the tactics. The Measures work to quantify success in completing the tactics, and the Timelines give us a framework for completion of the process.

Phase III – Implement:

The 2022 – 2024 Strategic Plan was offered by the Strategic Planning Team to the Harmonia Board of Directors for approval on December 15, 2021.

The management of the implementation, annual review and updating of the plan is scheduled for the Board Retreat on _____ of each year of the plan. SP Team prep meetings: 3/11/22, 6/11/22, 8/12/22, 12/16/22

Our Vision

Empower people to be healthy and fulfilled.

Our Mission Statement

Deliver best-practice Health Home, senior and behavioral health services to foster individuals' independence and improve their quality of life.

Our Core Values

We value integrity in the way we serve and empower individuals and are committed to:

Quality Care – we prioritize the quality of care we deliver, drawing from the best standards, superior quality reviews, continuous improvement and personal commitment.

Compassion – we bring kindness, humanity, empathy and sensitivity to our work to ensure boundaries, maximizing growth and allowing for provider self-care.

Collaboration – we are active and open to thoughtful collaborations supporting internal relationships, programs and community partners .

Culture of Dedication, Passion and Joy – we outwardly express dedication, passion and joy about our work to our clients, team and community.

Strategic Plan

Strategic: How will we achieve our goal?	Tactics: How will we achieve our strategies?	Metrics: How will we know that we've succeeded?	Resource Requirements: Who & what do we need to deliver?	Timeline: When will we complete our goals?
<p><i>Our Programs and Services</i></p> <p><i>Goal 1 - Harmonia programs and services align with our vision, mission and core values supporting community need and meeting desired outcomes</i></p> <p><i>Champion: Valerie Nowak</i></p>				
<p>Strategy 1.1:</p> <p>Program need is evidence-based, meets organizational mission, and is evaluated on a set of qualitative and quantitative measures.</p>	<p>Tactic 1.1.1:</p> <p>Assess community need and the link to the organization's foundational elements.</p> <ul style="list-style-type: none"> • Q1 Update: Sr. Programs – participate in the exhale training provided by the HFWCNY. Ready to move forward with additional programming through WNYICC. CarePanion grant application submitted. <p>Q2 Update:</p> <ul style="list-style-type: none"> • School program expansion paused due to MH clinic challenges. We have a waiting list for clients and are recruiting counselors. • Sr. Programming: WNYICC is providing referrals; we were 	<p>Need is documented in business plans and tied back to organization mission.</p>	<p>Val, Program leads, Magellan</p>	<p>Q1 - 2023</p>

	<p>offered first referral for the Community Health Manager Program. Erie County increased rates for the CarePanion program. Garman grant was denied. Waived in for full application for the Exhale grant – team is working on submission.</p> <p>Q3 Update:</p> <ul style="list-style-type: none"> • Exhale collaboration project approved. • School expansion grant paused. Revamping business plan to reflect new approach. Continued activity includes one extra day in Lake Shore High School & CCNY Education Evaluation Plan. <p><i>Tactic 1.1.2.:</i> Develop a set of processes and outcome measures across programs and services.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> • MH – contract with CCNY to work with 10e11 and Power BI reporting, information process and dashboard development; identify school outcomes with input from Ester Annan at Oishei – Kickoff meeting scheduled for 4/5/22 	<p>Performance measures cascade throughout program delivery – program, staff</p>	<p>Val, Michelle, Bev, Program leads, Magellan</p>	<p>Q4 - 2023</p>
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	<p>Q2 Update:</p> <ul style="list-style-type: none">• CCNY project started. First phase is validating data within 10e11. Setting up school program data tracking attendance, academic performance and behaviors. Greg & Michelle working with CCNY to refine the provider productivity model. CCNY is researching problems with two 10e11 reports. Continue internal work on MH Performance metrics, Provider Productivity model and awaiting clarification from 10e11 on discrepancies between two productivity reports in the system. <p>Q3 Update:</p> <ul style="list-style-type: none">• Continued work on Provider Productivity model. CCNY to support system automation and validation of 10e11 reports.• CCNY data project revisions to assist with development of clinic chart structure in advance of addressing data collection.			
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<p>Strategy 1.2 Growth strategy considers organic, collaborative partnerships and mergers to sustainably and culturally address community need.</p>	<p>Tactic 1.2.1 Growth and expansion opportunities identified with a focus on sustainability and organizational foundational elements.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> • In school program at Lake Shore High expanded to two days, recruiting new school coordinator. Oishei 2-year grant award • Exploring expanded collaboration with Roswell for Indigenous Cancer Research, Ovarian Cancer Project, Boys & Girls Clubs • CHUNY on pause pending additional staffing. <p>Q2 Update:</p> <ul style="list-style-type: none"> • Collaborating with Seneca Scientific+ to present 2021 MH expansion data in journal articles to be offered to the American Journal of Public Health and Journal of the American Psychological Assn. in support of future recognition and funding. <p>Q3 Update:</p> <ul style="list-style-type: none"> • Journal article on hold due to author illness. 	<p>Growth strategies support mission and are fiscally viable.</p>	<p>Val, Program leads, BOD, Board Facilities Committee, Magellan</p>	<p>Q1 - 2024</p>
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	<ul style="list-style-type: none"> • Considering value of continued relationship with Roswell Park Center for Indigenous Cancer Research due to insurance barriers, slow progress and time investment. • Ovarian Cancer Project – slow progress due to lack of providers. • Expansion on hold due to clinical staffing issues. • Attention has shifted to recruitment/retention. 			

<p><i>Our People</i></p> <p><i>Goal 2 – Harmonia recruits, retains and develops the people to build organization strength, deliver quality programs and services and support our culture.</i></p> <p><i>Champion: Beverly Eagan/Howard Martin</i></p>				
<p><i>Strategy 2.1:</i> <i>Staff –</i></p> <p>Create a success-focused culture that promotes learning, discovery and</p>	<p><i>Tactic 2.1.1:</i> Develop comprehensive organization structure, including organization chart, job descriptions and performance management processes that</p>	<p>Staff clearly understand job expectations and are regularly evaluated on meeting expectations.</p>	<p>Val, Michelle, Bev, Atlas Align, Program leads, Magellan</p>	<p>Q1 – 2024</p>

<p>achievement of our vision, mission.</p>	<p>provide clear expectations tied to desired outcomes.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> • Job Descriptions updates in progress • Atlas Align performance management work beginning <p>Q2 Update:</p> <ul style="list-style-type: none"> • Job Descriptions on track for completion • Performance management process rolling out slowly to allow for acceptance across organization – to begin with leadership team <p>Q3 Update:</p> <ul style="list-style-type: none"> • Job descriptions with program leadership for final approvals. • Performance management process in progress, leadership engaged in discussion with staff. <p><i>Tactic 2.1.2:</i> Develop staff recruitment processes founded in solid compensation and productivity models.</p>	<p>Organization uses appropriate models to support sustainable hiring.</p>	<p>Val, Megan, Michelle, Program leads, Magellan</p>	<p>Q1 – 2022</p>
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	<p>Q1 Update:</p> <ul style="list-style-type: none"> • Recruitment process planning begun • Recruitment compensation model mtg scheduled – work begun <p>Q2 Update:</p> <ul style="list-style-type: none"> • Recruitment process model presented • Recruitment compensation model work in process, compensation grid with salary ranges will inform final product. <p>Q3 Update:</p> <ul style="list-style-type: none"> • Full-cycle recruiting model work begun. <p><i>Tactic 2.1.3:</i> Create professional development process defined by program need and tied to expectations.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> • No update – considering within timeline <p>Q2 Update:</p> <ul style="list-style-type: none"> • No update – considering within timeline 	<p>Staff are expected to participate in professional development opportunities.</p>	<p>Val, Bev, Program leads</p>	<p>Q4 – 2024</p>
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	<p>Q2 Update:</p> <ul style="list-style-type: none"> • Three new Board members voted onto BOD • Board Committees in review <p>Q3 Update:</p> <ul style="list-style-type: none"> • Update to follow <p><i>Tactic 2.2.3</i></p> <p>Board focuses on retention of members dedicated to the mission and recruitment of new members within a defined skill set to support the organization.</p> <p>Q1 Update: No update</p> <p>Q2 Update:</p> <ul style="list-style-type: none"> • Board to discuss skill set required to support organization <p>Q3 Update:</p> <ul style="list-style-type: none"> • Update to follow 	<p>Board evaluations and terms are conducted yearly and analyzed for need.</p>	<p>BOD, Governance Committee</p>	<p>2 – 2023</p>
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	<p><i>Tactic 2.2.4</i></p> <p>Board development plan is based on internal and external training.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> • No update <p>Q2 Update:</p> <ul style="list-style-type: none"> • Board to discuss training <p>Q3 Update:</p> <ul style="list-style-type: none"> • Update to follow 	Board training calendar	Board Chair, Governance Committee	Q4 – 2022
<p><i>Fiscal Viability</i></p> <p><i>Goal 3 – Harmonia embraces financial and data-driven growth and sustainability.</i></p> <p><i>Champion: Michelle Chiappetta</i></p>				
<p><i>Strategy 3.1:</i></p> <p>Harmonia is financially sustainable.</p>	<p><i>Tactics 3.1.1:</i></p> <p>Create a financial infrastructure to supports the accurate and timely preparation of financial statements in a format that satisfied the needs of different audiences (BOD, management)</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> • Quarterly budget meetings with program managers. 	<p>Financial statements prepared in proper format.</p> <p>Financial statements are prepared within a proper timeframe.</p>	Michelle, Val, Magellan, Chair of Finance Committee	Q4 – 2022

	<p>Q2 Update:</p> <ul style="list-style-type: none"> Budget meetings evolving and incorporating service delivery and relationship to financial performance. MH programs include clinic stats. <p>Q3 Update:</p> <ul style="list-style-type: none"> Quarterly budget meetings continue, including service delivery component Staffing challenges are an impediment to financial administration. Deadlines are met but require extra effort on the part of Director of Finance & existing staff. <p><i>Tactic 3.1.2:</i> Business plans are supported through appropriate financial modeling, tied to financial expectations and inclusive of finance, marketing and operational considerations.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> MH Expansion business plan presented to funder Financial model for collaborative opportunities has begun development 	<p>Contribution margin by program/service line.</p> <p>Key performance indicators – financial, marketing and operational</p>	<p>Val, Michelle, Program leads, Magellan</p>	<p>Q4 – 2023</p>
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	<p>Q2 Update:</p> <ul style="list-style-type: none"> MH Expansion business plan financial projections to be updated with more accurate numbers. While this project has been paused, identifying the correct projections will help organization be ready when things change. <p>Q3 Update:</p> <ul style="list-style-type: none"> Mental Health In-School program updated in anticipation of Oishei releasing funds. KPI development is focused on MH Clinic as a priority & addressed in Tactics 3.1.3 & 3.1.4 <p><i>Tactic 3.1.3</i> Develop and refine a MH recruitment model to support hiring decisions. Model includes estimates of direct revenue and fully loaded compensation costs.</p> <p>Q3 Update:</p> <ul style="list-style-type: none"> MH recruitment model is used to evaluation candidates as they become available. <p><i>Tactic 3.1.4</i> Develop and refine MH provider productivity model reporting revenue generated, fully loaded</p>	<p>Recruitment decisions help to ensure that new hires are fully utilized and fiscally profitable</p> <p>MH administration is improved based upon data</p>	<p>Val, Megan, Michelle, Greg</p> <p>Val, Megan, Michelle, Greg'</p>	<p>Q1 2022</p> <p>Q1 2022</p>
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<p>Strategy 3.2:</p> <p>Marketing & Development efforts engage grantors, major donors and contributors in financial support of our mission and vision.</p>	<p>compensation costs and utilization of available time serving patients.</p> <p>Q3 Update:</p> <ul style="list-style-type: none"> Model updated to reflect productivity in Jan-June 2022 reporting period. <p>Tactic 3.2.1:</p> <p>Marketing & communications plan is tied to engagement and support of organization.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> Marketing plan in development Exploring engagement of external social media manager <p>Q2 Update:</p> <ul style="list-style-type: none"> Marketing Plan presented Plan implementation begun External social media manager engaged <p>Q3 Update:</p> <ul style="list-style-type: none"> MH counselors is a priority – currently developing more effective plan to address communications 	<p>Awareness & engagement metrics</p>	<p>Val, Michelle, Magellan, Chair of Marketing & Development Committee</p>	<p>Q4 – 2022</p>
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	<p>challenges & support HR job listings.</p> <ul style="list-style-type: none"> • Hired SM manager efforts have shown increase in engagement. <p><i>Tactic 3.2.2:</i></p> <p>Development plan strategically and consistently engages contributors across multiple donor levels.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> • Development plan drafted • Contact Management Software purchase - Bloomerang <p>Q2 Update:</p> <ul style="list-style-type: none"> • Meetings with Southtowns Chamber to expand reach to prospective donors • Uploading contacts into Bloomerang system <p>Q3 Update:</p> <ul style="list-style-type: none"> • Office Manager becomes point person on CMS (Bloomerang). Working on bringing system on-line with contacts, relationship management & financial connections to QB. • Southtowns Chamber strategy in development. 	<p>Financial metrics – grant funding, donor support</p>		<p>Q1 – 2023</p>
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<p>Strategy 3.3:</p> <p>Organization is compliant with rules & regulations that govern operations and successfully manages the risk associated with service delivery.</p>	<p>Tactic 3.3.1:</p> <p>Identify and document procedures and processes to ensure on-going compliance.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> • Compliance audit and plan completed by Bonadio <p>Q2 Update:</p> <ul style="list-style-type: none"> • Monthly meetings delayed because of illness within Bonadio – will restart in late June • Code of Ethics completed but needs review • Conflict of interest for staff is included in the Code of Ethics • HIPAA & Security trainings are continuing <p>Q3 Update:</p> <ul style="list-style-type: none"> • Compliance policies mostly completed. Business Associate agreement to be completed. Agency Privacy Policy completed & to be posted on website. • Compliance audit stalled due to illness. New plan for remainder of 2022 & 	<p>Inventory of compliance requirements and documentation of processes.</p>	<p>Bev, Bonadio, BOD representative on Compliance Committee</p>	<p>Q4- 2021</p>
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	<p>2023 in response to recent updates from OIG & OMH.</p> <ul style="list-style-type: none"> • Regular communication with Bonadio, including formal meetings every other month. • Code of Ethics reviewed & approved, sent to BOD. • Conflict of interest included in Code of Ethics – micro training for staff. • HIPAA & sexual harassment training to be completed at end of year. Security training to be completed in January. <p>Tactic 3.3.2:</p> <p>Identify appropriate levels of professional, general and BOD liability insurances.</p> <p>Q1 Update:</p> <ul style="list-style-type: none"> • Yearly review of insurances presented by broker <p>Q2 Update:</p> <ul style="list-style-type: none"> • No update – Completed in Q1 <p>Q3 Update:</p> <ul style="list-style-type: none"> • NA 	<p>Insurance levels are appropriate and optimal, policies are current and updated</p>	<p>Michelle</p>	<p>Q1 - 2022</p>
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Key Learnings:

- Many opportunities, prioritization is important – limited resources – careful with over-extension
- Mindful with expanding school program or other efforts – must have staff in place and/or back-up in order to consistently deliver services
- Start at the beginning – a linear process and plan will help us along the way (ie: performance appraisals)
- Focus on building a strong, resilient infrastructure that also preserves our culture will enable organization to take advantage of opportunities
- Break the mold – consider alternative approaches
- Recruiting challenges are affecting every area of the organization