

Goal	Strategy	Tactic	Metrics	Resource	Timeline	Q1 2024 SP Progress	Q1 2024 Summary Notes
CHAMPION: VAL							
Goal 1: Programs and Services. <i>Harmonia programs and services align with our vision, mission and core values supporting community need and meeting desired outcomes.</i>	1.1: Program need is evidence-based, meets organizational mission, and is evaluated on a set of qualitative and quantitative measures.	1.1.1: Assess community need and the link to the organization’s foundational elements.	Need is documented in business plans and tied back to organization mission.	Val, Program Leads, Magellan	Q1 - 2023 Updated to Q1-2024	Behind target -- consider revising target date	Business plans for MH and SS need to be reviewed and revised. Multiple interruptions and other priorities delayed process. Even though nearly complete the time-span in development was so long it is likely plans have changed. HH plan was started and discontinued due to hiring issues. I Current grants: SS: none active - exploring, MH: Mother Cabrini for school program, HH: HH+ Grant ---Should be noted despite incomplete business plans, programming is being addressed as per goal and strategy.
		1.1.2: Develop a set of processes and outcome measures across programs and services.	Performance measures cascade throughout program delivery – program, staff	Val, Michelle, Bev, Program leads, Magellan	Q4 - 2023 Revised to Q4 - 2024	On target	Business plans are not completed. These plans should include outcome measures for programs once completed. Plan in place to meet quarterly regarding MH data from CCNY

							Provider Productivity dashboard.
	1.2: Growth strategy considers organic, collaborative partnerships and mergers to sustainably and culturally address community need.	1.2.1: Growth and expansion opportunities identified with a focus on sustainability and organizational foundational elements.	Growth strategies support mission and are fiscally viable.	Val, Program leads, BOD, Board Facilities Committee, Magellan	Q1 - 2024		
CHAMPION: BEV AND HOWARD							
Goal 2: People <i>Harmonia recruits, retains and develops the people to build organization strength, deliver quality programs and services and support our culture.</i>	2.1: Staff Create a success-focused culture that promotes learning, discovery and achievement of our vision, mission	Tactic 2.1.1: Develop comprehensive organization structure, including organization chart, job descriptions and performance management processes that provide clear expectations tied to desired outcomes.	Staff clearly understand job expectations and are regularly evaluated on meeting expectations.	Val, Michelle, Bev, Atlas Align, Program leads, Magellan	Q1 – 2024		Successfully completed first year implementing performance appraisal processes. Esc is updating job descriptions to include essential functions. Org. Chart completed by VN, Job descriptions - Complete. Performance management-beginning 2nd cycle
		Tactic 2.1.2: Develop staff recruitment processes founded in solid compensation and productivity models.	Organization uses appropriate models to support sustainable hiring	Val, Megan, Michelle, Program leads, Magellan	Q1 - 2022 Update Q1 2024		Three campus events, Niagara University & Canisius to build brand awareness. Expanded job boards/postings. DOL automatically indexing open positions from our careers page. More outreach for internal referrals (senior leadership -please assist) Indeed Smart Sourcing (sources candidates that

						meet our criteria) Digital marketing campaign launched - waiting for results. Currently dry market, no candidates, zero responses, applications, etc.
		Tactic 2.1.3: Create professional development process defined by program need and tied to expectations.	Staff are expected to participate in professional development opportunities. (To include outcomes for all staff x% of staff have utilized training)	Val, Bev, Program leads	Q4 – 2024	
						no updates to provide.
	2.2: People - Board of Directors Board provides good leadership and decision making appropriate skill set and fiduciary oversight.	Tactic 2.2.1: Ensure board by-laws and related documents are updated to address legal requirements and meet the needs of the organization.	Yearly conflict of interest and Board member expectations are completed.	Board Chair, Governance Committee	Q2 - 2024	
		Tactic 2.2.2: Board committees are appropriate to the needs of the organization and offer the opportunity to reach out to non-board members with subject matter expertise.	Committees are active and membership is supportive of charter	Board Chair, Governance Committee	Q2 - 2024	
		Tactic 2.2.3 Board focuses on retention of members dedicated to the mission and	Board evaluations and terms are conducted yearly and analyzed for need.	BOD, Governance Committee	Q3 - 2024	

		recruitment of new members within a defined skill set to support the organization.					
		Tactic 2.2.4: Board development plan is based on internal and external training.	Board training calendar **An overview of Board Requirements and gap analysis will be developed at May Annual Board Meeting	Board Chair, Governance Committee	Q4 – 2022		
CHAMPION: MICHELLE							
Goal 3 – Fiscal Viability <i>Harmonia embraces financial and data-driven growth and sustainability.</i>	3.1: Harmonia is financially sustainable.	Tactics 3.1.1: 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)	Financial statements prepared in proper format.	Michelle, Val, Magellan, Chair of Finance Committee	Q4 – 2022 Update Q4 2023	created new Rev Cycle Mgr Position	New Rev Cycle Manager hired to start on April 8th, 2024

		<p>Tactic 3.1.2: Business plans are supported through appropriate financial modeling, tied to financial expectations and inclusive of finance, marketing and operational considerations.</p>	<p>Contribution margin by program/service line. Key performance indicators – financial, marketing and operational</p>	<p>Val, Michelle, Program leads, Magellan</p>	<p>Q4 – 2023-</p>	<p>MH and SS Business Plans in progress</p>	<p>Mental Health and Senior Services Business Plans are being revised to identify 1115 Waiver opportunities.</p>
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		Tactic 3.1.3 Develop and refine a MH recruitment model to support hiring decisions. Model includes estimates of direct revenue and fully loaded compensation costs.	Recruitment decisions help to ensure that new hires are fully utilized and fiscally profitable	Val, Megan, Michelle, Greg	Q1 2024		
		Tactic 3.1.4 Develop and refine MH provider productivity model reporting revenue generated, fully loaded compensation costs and utilization of available time serving patients.	MH administration is improved based upon data	Val, Megan, Michelle, Greg	Q1 2022 Update Q4 2023 Update to Q4 2024	Training occurred 4th Quarter 2023 - Quarterly meetings scheduled	Had 4th Quarter meeting with CCNY and scheduled out quarterly meeting for the rest of 2024. Val, Greg, Bev, Michelle and Tristan will all be present. Michelle uploads information a week prior in preparation for this meeting. Unit goals in place for Clinicians, not NPs. CCNY data intended to enhance current practices.
	Strategy 3.2: Marketing & Development efforts engage grantors, major donors and contributors in financial support of our mission and vision.	Tactic 3.2.1: Marketing & communications plan is tied to engagement and support of organization	Awareness & engagement metrics	Val, Michelle, Magellan, Chair of Marketing & Development Committee	Q4 – 2022 - Plan completed, ongoing implementation of initiatives	Implementing plan - on-going	Marketing of School Program & Caregiver Support (featuring mental health and senior services) are being implemented as part of grant funding supporting those initiatives. Caregiver stories videoed and available on Harmonia's YouTube Channel, spots on WBBZ, ad

						and story in Budffalo Healthy Living and four segments recorded with Marissa Biondolillo and Jennifer Gunia for Senior Radio on WBEN. Business First BPTW application submitted and Harmonia selected as finalist - shared badge with 2023 and 2024 BPTW on website and via social media with link to Careers page. MH Clinician recruitment campaign live.
		Tactic 3.2.2: Development plan strategically and consistently engages contributors across multiple donor levels.	Financial metrics – grant funding, donor support	Val, Michelle, Magellan, Chair of Marketing & Development Committee	Q4 - 2022 -Plan completed - Ongoing initiatives	Implementing plan - on-going Garden Party event activity in full-swing - collateral describing event, Save the Date, Ticket Landing page, Gift Card, Silent Auction item donation letters, Social media posts - crated by Incept and Harmonia's social media manager shared, Southtowns Chamber eblast to membership sent out. Sponsors in the works - Evans, CapStream paying sponsors, Florida condo stay for one week secured. Event night coming together nicely. CMS - Marta nd Courtney updating system and receiving training. Grant - several grants in the works for capital and programmatic needs. Health Home Pkus and

							Erie County RFP for Senior Services awarded.
	Strategy 3.3: Organization is compliant with rules & regulations that govern operations and successfully manages the risk associated with service delivery.	Tactic 3.3.1: Identify and document procedures and processes to ensure on-going compliance.	Inventory of compliance requirements and documentation of processes.	Bev, Bonadio, BOD representative on Compliance Committee	Q4- 2021 - Updated timeline to Q1 2024	1st quarter board training complete & internal audit schedule has been developed. Annual agency risk assessment in progress. On-target with monthly compliance training. Bonidillo reviewing Compliance manual for updates.	Board training was on Elements of Compliance. All staff completed Culture of Compliance, & Difference between Ethics and Compliance. Clinical staff completed Billing and Coding & False Claims training. Clinical chart audit in progress. Billing Audit scheduled for August. HR Audit scheduled for April.
		Tactic 3.3.2: Identify appropriate levels of professional, general and BOD liability insurances.	Insurance levels are appropriate and optimal, policies are current and updated	Michelle	Updated timeline to Q1 2024	Compliant for 2024	Reviewed and renewed insurance for 2024 in Feb
	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 • Consider continuous recruitment for hard to fill positions

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