

Goal	Strategy	Tactic	Metrics	Resource	Timeline	Q3 2023 SP Progress Update	Q3 2023 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	On schedule. MH and SS Business plans scheduled for Oct and Nov completion. HH Plan just beginning.	School Programs Manager hired in May. Full application submitted for Mother Cabrini and Garman. Plan is to apply for State grant as well for MH in Schools. School Progs Mgr also forming connections and assessing need w/in area schools. Pathways program running under Y1 of Exhale grant. Wilson Legacy Grant for Caregivers received for SS. This will be another collaboration with MH. In development; plan to move to implementation in October-grant closes June 2024.
		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 track, but should prioritize for 2024. CCNY dashboard in process. Nothing formal considered for SS and HH. Will likely understand more with Bus PI development..	CCNY dashboard project is in process; awaiting final product. No other updates- See Q1 2023 update notes. Suggestion made last meeting; no determination. Please reconsider.
	1.2: Growth strategy considers organic, collaborative partnerships and mergers to sustainably and	1.2.1: Growth and expansion opportunities identified with a focus on sustainability and organizational	Growth strategies support mission and are fiscally viable.	Val, Program leads, BOD, Board Facilities Committee, Magellan	Q1 - 2024	In question. This writer made a suggestion (see Q1 2023 Update). The change has not been adopted. Update: Discussion with Strategic	Work in Tactic 1.2.1 is supporting the vision and mission of the agency. Thoughtful approach to expansion considerations in program delivery and fiscal viability.

	culturally address community need.	foundational elements.				Planning Cmte resulted in determination this Tactic should remain. (See summary notes).	
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	On target	Performance evaluations to be completed in September '23. Working on performance appraisal process - September reviews with employees. Included director conversation with employees regarding successes, goals for future, training & development opps.
		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	On target	HR developed a recruitment process incorporating web based, social media, passive and campus recruiting efforts. Internal recruitment process to include five stage flow chart from completion of recruitment questionnaire through orientation of new hire. Developing recruiting dashboard to track metrics so we can measure the success of our recruiting effort.

		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.	Val, Bev, Program leads	Q4 – 2024	On target	A development plan between employee and manager will be agreed upon during the appraisal meeting and opportunities will be explored. This will result from Perform. Appraisal discussions during which professional development opportunities will be addressed.
	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	Q4– 2022	NO STATUS UPDATE PROVIDED	Conflict of interest questionnaire was sent to all board members during Q1 of 2023.
		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	Q1 – 2023	NO STATUS UPDATE PROVIDED	NO SUMMARY PROVIDED
		Tactic 2.2.3 Board focuses on retention of members dedicated to the mission and recruitment of new members within a defined skill set to	Board evaluations and terms are conducted yearly and analyzed for need.	BOD, Governance Committee	Q2 - 2023	NO STATUS UPDATE PROVIDED	NO SUMMARY PROVIDED

		support the organization.					
		Tactic 2.2.4: Board development plan is based on internal and external training.	Board training calendar	Board Chair, Governance Committee	Q4 – 2022	NO STATUS UPDATE PROVIDED	NO SUMMARY PROVIDED
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	Updated on 9/7/23 to Qtr 4 2023.	Training is continuing with Athena on her Accts Receivable role. Aliza is expanding in her role with additional tasks to make room for Tammy to assist Michelle in finance .
		Tactic 3.1.2: Business plans are supported through appropriate financial modeling, tied to financial expectations and inclusive of finance, marketing and operational considerations.	Contribution margin by program/service line. Key performance indicators – financial, marketing and operational	Val, Michelle, Program leads, Magellan	Q4 – 2023	On track. Business Plan for MH nearly completed, SS in progress, HH started.	MH Bus Planning -Michelle to do reforecast to year end. - making assumptions on new hiring, NP Revenue. Main priority is hiring staff and reducing wait list. HH-Continue recruiting for staff; Kristy/Lauren to meet with Kalos to develop partnership;outreaching to friends of the night to increase HH+ population. SS-Programs Senior Services – County – Case management – waiting list – no release of clients, anticipating a list coming out 9/11 CarePanion – County - every

						<p>week clients receive service Private Pay – flexible- can be once a month, bi wkly etc Pathways for Caregivers – three year collaboration with Cradle Beach and Lisa Rood WNY Integrated Care Collaborative – Falls prevention, chronic care management, caregiver Caregiver Support Project – Wilson Legacy Fund – collaboration with Harmonia Mental Health. Grant ends June 2024</p> <p>Need & Gap CarePanion Survey – current clients (March) Erie County Dept of Senior Services Hamburg Senior Advisory Board Health Foundation Needs Assessment for Cattaraugus, Chautauqua and Allegany Counties Most highly paid CarePanion is serving Private Pay clients with the least reimbursement County contract higher reimbursement rate for CarePanions</p>	
		<p>Tactic 3.1.3 Develop and refine a MH recruitment model to support hiring decisions. Model includes estimates of direct revenue</p>	<p>Recruitment decisions help to ensure that new hires are fully utilized and fiscally profitable</p>	<p>Val, Megan, Michelle, Greg</p>	<p>Q1 2022</p>	<p>Behind target.</p>	<p>Model completed, used to support recruiting decision-making</p>

		and fully loaded compensation costs.					
		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	On target Waiting to hear back from CCNY. Most recent upload in August. No further info on dashboard.	Per Tristan 9/7/23, Dashboard is complete and he can install later this month.
	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	Behind target	Sponsorships at local grassroots level (Lakeshore Little League, Hilbert Football, Southtowns Downtown; Business First MH Focus recruitment ad; 2024 BPTW Nomination. Recruitment initiatives - purchase Indeed ad around MH Counseling, social media, Careers page application process to be finalized based on ESC engagement. Digital marketing ads - proposal in development. Marketing activities centered around recruitment. Plan reviewed and updated yearly.
		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	Q1 – 2023	Behind target. Contact Management - inputting and tracking donors in CMS, preparing for on-going engagement; M & D Committee -	Bloomerang - training and exploration in contact management, reporting templates, segmentation & communications - letters, emails - in preparation for Year End Appeal; Reenergized Marketing & Development Committee 0 identifying 2024

						developing 2024 event; evaluating grant writers to support efforts. Reviewed yearly and updated.	event, growing committee to increase awareness and expand reach to prospective contributors; strategic outreach to OnCore Golf attendees; review proposal from Upper Edge grant writers to support capital and capacity funding.
	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	Behind target. OMH regulation updates were addressed by the Compliance Committee following advisement from Bonadio. Obtained updated tool kit from Bonadio to ensure policies and procedures are up to date.	Monthly meetings with Bonadio continue. They are a resource to ensure compliance efforts are up to date.
		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	Q1 - 2022	Reviewed each year to ensure coverage and compliance	NO SUMMARY PROVIDED
Key Learnings:	• Many opportunities, prioritization is important – limited resources – careful with over-extension						
	• Mindful with						

<p>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</p>							
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