



life. with balance.

Harmonia Collaborative Care

2021 – 2024 Strategic Plan

Executive Summary

Harmonia Collaborative Care's 2021- 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.

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 2021- 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	

2021- 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 2021 – 2024 Strategic Plan was offered by the Strategic Planning Team to the Harmonia Board of Directors for approval on _____.

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.

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 we will achieve our goal?	Tactics: How we will achieve our strategies?	Metrics: How we will know that we've succeeded?	Resource Requirements: Who & what do we need to deliver?	Timeline: When we will 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>Strategy 1.2</p> <p>Growth strategy considers organic, collaborative partnerships and mergers to sustainably and culturally address community need.</p>	<p>Tactic 1.1.1:</p> <p>Assess community need and the link to the organization's foundational elements.</p> <p>Tactic 1.1.2.:</p> <p>Develop a set of processes and outcome measures across programs and services.</p> <p>Tactic 1.2.1</p> <p>Growth and expansion opportunities identified with a focus on sustainability and organizational foundational elements.</p>	<p>Need is documented in business plans and tied back to organization mission.</p> <p>Performance measures cascade throughout program delivery – program, staff</p> <p>Growth strategies support mission and are fiscally viable.</p>	<p>Val, Program leads, Magellan</p> <p>Val, Michelle, Bev, Program leads, Magellan</p> <p>Val, Program leads, BOD, Board Facilities Committee, Magellan</p>	<p>Q1 - 2023</p> <p>Q4 - 2023</p> <p>Q1 - 2024</p>

Our People

Goal 2 – Harmonia recruits, retains and develops the people to build organization strength, deliver quality programs and services and support our culture.

Champion: Beverly Eagan/Howard Martin

<p><i>Strategy 2.1:</i> <i>Staff –</i></p> <p>Create a success-focused culture that promotes learning, discovery and achievement of our vision, mission.</p>	<p><i>Tactic 2.1.1:</i> Develop comprehensive organization structure, including organization chart, job descriptions and performance management processes that provide clear expectations tied to desired outcomes.</p> <p><i>Tactic 2.1.2:</i> Develop staff recruitment processes founded in solid compensation and productivity models.</p> <p><i>Tactic 2.1.3:</i> Create professional development process defined by program need and tied to expectations.</p>	<p>Staff clearly understand job expectations and are regularly evaluated on meeting expectations.</p> <p>Organization uses appropriate models to support sustainable hiring.</p> <p>Staff are expected to participate in professional development opportunities.</p>	<p>Val, Michelle, Bev, Atlas Align, Program leads, Magellan</p> <p>Val, Megan, Michelle, Program leads, Magellan</p> <p>Val, Bev, Program leads</p>	<p>Q1 – 2024</p> <p>Q1 – 2022</p> <p>Q4 – 2024</p>
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<p>Strategy 2.2: Board of Directors -</p> <p>Board provides good leadership and decision-making through the appropriate skill set and fiduciary oversight.</p>	<p>Tactic 2.2.1:</p> <p>Ensure board by-laws and related documents are updated to address legal requirements and meet the needs of the organization.</p> <p>Tactic 2.2.2:</p> <p>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.</p> <p>Tactic 2.2.3</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>Tactic 2.2.4</p> <p>Board development plan is based on internal and external training.</p>	<p>Yearly conflict of interest and Board member expectations are completed.</p> <p>Committees are active and membership is supportive of charter.</p> <p>Board evaluations and terms are conducted yearly and analyzed for need.</p> <p>Board training calendar</p>	<p>Board Chair, Governance Committee</p> <p>Board Chair, Governance Committee</p> <p>BOD, Governance Committee</p> <p>Board Chair, Governance Committee</p>	<p>Q? – 2022</p> <p>Q1 – 2023</p> <p>Q2 – 2023</p> <p>Q4 - 2022</p>

Fiscal Viability

Goal 3 – Harmonia embraces financial and data-driven growth and sustainability.

Champion: Michelle Chiappetta

<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><i>Tactic 3.1.2:</i></p> <p>Business plans are supported through appropriate financial modeling, tied to financial expectations and inclusive of finance, marketing and operational considerations.</p>	<p>Financial statements prepared in proper format.</p> <p>Financial statements are prepared within a proper timeframe.</p> <p>Contribution margin by program/service line.</p> <p>Key performance indicators – financial, marketing and operational</p>	<p>Michelle, Val, Magellan, Chair of Finance Committee</p> <p>Val, Michelle, Program leads, Magellan</p>	<p>Q4 – 2022</p> <p>Q4 – 2023</p>
<p><i>Strategy 3.2:</i></p> <p>Marketing & Development efforts engage grantors, major donors and contributors in financial support of our mission and vision.</p>	<p><i>Tactic 3.2.1:</i></p> <p>Marketing & communications plan is tied to engagement and support of organization.</p> <p><i>Tactic 3.2.2:</i></p> <p>Development plan strategically and consistently engages contributors across multiple donor levels.</p>	<p>Awareness & engagement metrics</p> <p>Financial metrics – grant funding, donor support</p>	<p>Val, Michelle, Magellan, Chair of Marketing & Development Committee</p>	<p>Q4 – 2022</p> <p>Q1 – 2023</p>

<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>Inventory of compliance requirements and documentation of processes.</p>	<p>Bev, Bonadio, BOD representative on Compliance Committee</p>	<p>Q4- 2021</p>
	<p>Tactic 3.3.2:</p> <p>Identify appropriate levels of professional, general and BOD liability insurances.</p>	<p>Insurance levels are appropriate and optimal, policies are current and updated</p>	<p>Michelle</p>	<p>Q1 - 2022</p>

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