



To: Valerie Nowak, LMHC, CEO
From: Marta Hiczewski MS, Managing Partner
Date: April 4, 2024
Re: Status Report – March 2024

Period Accomplishments – March 2024

- **Finance –**
 - Reply to Evans re: LOC questions
 - Meeting with Val on March 5 to discuss finance priority issues
 - Support SS business plan preparation
 - Review resumes for Revenue Cycle Manager

- **Board –**
 - Governance Committee Mtg – Update Recruitment Spreadsheet, update Lou for BOD meeting; reach out to Highmark re employee board member status

- **MH Programing/Infrastructure –**
 - MH Monthly Review – Recruitment campaign kick-off digital ads 3/25. Send Jessica Russo campaign ads to share on social media.
 - School Program – MCHF update meeting with Laura and Sarah
 - Business Plan – overview meeting with Laura to review plan, discuss 1115 waiver and thinking behind other opportunities.

- **Marketing & Development –**
 - Business First – BPTW badge added to website header and social media, change Our Partnerships to Awards & Partnerships (add 2023/2024 badges)
 - Contact management process mtg with Courtney/Michelle – outline Coaching opportunities with Bloomerang
 - Bloomerang – enter Garden Party contacts & status
 - Social Media – support manager
 - M & D Meeting – Garden Party priority, reach out to prospective sponsors, Incept Ticketing page finalized, SRCC – eblast sent out
 - Upper Edge Consulting meetings – updates, draft communications portion

- Caregiver Support Series – finalize videos, upload to Harmonia’s YouTube and begin WBBZ ads
- **Organization Infrastructure –**
 - Priorities Meeting – monthly priorities
- **Senior Services –**
 - SS Business Plan – review plan & prepare for updating with new info on 1115 Waiver

Next Period Priorities – April 2024

- **Board –**
 - Governance – Board member recruitment management process
 - Garden Party – Board sponsor referral and ticket purchase support
- **Finance –**
 - Meet with Michelle and Kathy to develop plan of attack for AR administration
 - Review the productivity report with Tristan, Michelle, Laura to understand metrics and how we will use the report on an ongoing basis
 - Support 1115 waiver initiatives
 - Complete the Line of Credit policy
 - Refine Cash Forecast model based on 13 month report
 - Finalize Evans LOC issue
- **MH Programing/Infrastructure –**
 - MH Business Plan – plan updating with Director of Clinics
 - Recruitment – MH recruitment ads live, schedule monthly review meeting
- **Marketing & Development –**
 - Bloomerang – Finalize Coaching for Courtney and additional Coaching projects to complete under this contract
 - Upper Edge Meetings – support process
 - Garden Party – Sponsorships are a priority. Our reach to Gift Wall, Wine Pull, Silent Auction team. Invitation finalized and sent out.
- **Organization Infrastructure –**
 - Priorities Meeting – identify priorities – discuss Executive Assistant role

- **Senior Services** –
 - Senior Services Business Plan – input on community need, include 1115 Waiver & Ground Game opportunities with WNYICC, Caregiver Support grant application.
 - Caregiver Support Project – BHL article, final report – budget & narrative due in June 2024

- **Health Home** –
 - HH+ follow-up on calendar for implementation, recruitment effort.

- **Strategic Plan** – share Q1 2024 Excel spreadsheet for updating