



To: Valerie Nowak, LMHC, CEO  
From: Marta Hiczewski MS, Managing Partner  
Date: September 25, 2022  
Re: Status Report – August 2022

### **Period Accomplishments – August 2022**

#### **Organization –**

**Organization Infrastructure** – Team meetings to update calendar of activities, MH Clinic organization needs – Manual update, data workflow, provider productivity and recruitment efforts. Actions tie to the strategic plan.

**Strategic Plan** – Q3 SP Team updates for BOD presentation

#### **Marketing & Communications –**

**Marketing** – Recruitment brochure delivered, CarePanion Open House media alert, coordinate ID badges, Photographer head shots/mock up photos, Forever Young Expo table contracted, Network in Aging Annual Report ad contract, BOD People on the Move listings

**Social Media** – oversight of social media

**Digital Marketing** – Recruitment ad campaign targeted to 50 locations and specific to credentials/titles, led process to understand and implement link from recruitment campaign landing page to Indeed application. Recommend place hold on building out Careers page at this time.

#### **Mental Health Expansion -**

**Seneca journal article** – on hold – no new activity

**School Expansion** – Adjust approach to create a non-billable School Program Coordinator to work in conjunction with mental health counselors, adjust business plan and forecast. Present new plan to Oishei, which was well received.

**Data Management** – CCNY – no new activity

**Senior Services** – Met with Garman Foundation program manager in preparation for Fall application, consider other caregiver grant funders

## **Development -**

**Southtowns Chamber** – developing on-going strategy to engage businesses and individuals associated with chamber

**Bloomerang** – Contact Management Software – system training, preparing for Year End Appeal

## **Finance –**

**Finance Committee:** Preparation for and participation in the finance committee meeting. 2<sup>nd</sup> quarter loss due to decreased revenue. Trend will continue into the 3<sup>rd</sup> quarter. Credentialling is a issue. Revenue is recorded that may not be paid.

**Board Meeting:** Presented financial information to the board. We are experiencing some turbulence. Balance sheet is strong and we have resources to help us weather the storm.

**Second Quarter Budget vs Actual:** Participated in budget meeting. Open positions are a problem for all service lines. County contract is a concern for Sr. Services.

**School Program Business Plan:** updated the forecast model. Presented to Ester of Oishei.

**Strategic Plan:** added tasks to the plan; 3.1.3 recruitment model, 3.1.4 provider productivity

**Investment Policy:** Created draft of policy and discussed with Raj.

## **Next Period Priorities – September 2022**

## **Organization development-**

**Organization Infrastructure** – update calendar of activities, timelines, responsible parties and SP Goal. MH/Admin organization structure – including open and growth positions, define client experience flow chart.

**Wilson and HFWCNY Grant:** Develop action plan for implementation of grant requirements.

## **Marketing & Communications –**

**Marketing** – Southtowns Chamber Nonprofit of the Year release, Exhale release

**Digital Marketing** – Digital recruitment ad campaign begins 9/6

**Social Media** – oversight

## **Development –**

**Bloomerang** – local outreach to other users to support training around uploading records

**Update Letter** – mail to prospects in advance of Annual Report and in preparation for End of Year Appeal

**Event** – developing first friend-raising – fund-raising event lead by new Board member for January 2023

**Mental Health Expansion –**

**MH Business Plan** – review plan and update

**School expansion** – revise MH Expansion School Business plan narrative and forecast, send to Oishei and request they release the funding. Develop approach to reach out to other funders to support School Program Coordinator.

**Finance -**

**Investment policy:** update policy and present to the investment committee on Thursday, Sept. 29<sup>th</sup>. Pending approval of the policy, Trubee Collins and CFGB will be asked to present. We will select one advisor/custodian and roll Invesco into the portfolio.

**Provider Productivity:** CY/PY comparison will be conducted on Wednesday, Sept. 28<sup>th</sup>

**Financial Statements:** Review and discuss the July financial statements