



To: Valerie Nowak, LMHC, CEO
From: Marta Hiczewski MS, Managing Partner
Date: January 3, 2022
Re: Status Report – December 2021

Period Accomplishments – December 2021

Organization – 3-Month strategic priorities

Mental Health Business Plan – MH Business Plan tied to Strategic Plan strategies narrative completed – proforma partially completed

BOD Presentation: Present 2021 accomplishments and preliminary focus for 2022 to execution the Strategic Plan and support for the Hamburg facility move

2021-2024 Strategic Plan –BOD approved plan at December meeting

Marketing & Communications –

Social Media – relevant holiday posts, #WellnessWednesdays

Digital Marketing – CarePanion ad on Facebook delivered 29 calls to the office, Mental Health ad in development to begin running for 90 days in January 2022. Five segments to be developed from interview footage to run in social media.

Video – 2-minute – first version of video sent to leadership for input, changes provided to videographer

Hamburg Sun & Buffalo Healthy Living – MH ads placed

Development –

Year-End Appeal – mailed to list of approximately 1900 contacts

Finance –

MH Business Plan – Developed template for three-year forecast. Identified units of service as a fundamental metric for service and billing. Developed legend for business plan to convey assumptions and detail of the buildup of the numbers displayed in the plan. Determined that school programs are the first priority and collaborations, and physician education is secondary.

Mental Health Expansion -

Assessment Report – Journal article MOU with Seneca legal counsel

Business Plan – Business Plan report for the Blue Fund drafted and shared for approval, tied to Strategic Plan strategies, awaiting finalization of three-year forecast. Three strategic area, along with Move, for expansion:

- In-School Counseling and awareness – met with Mental Health Advocates to collaborate on training to teachers, parents and students, this is the top priority
- Collaboration with Senecas and Roswell Park Cancer Institute Center for Indigenous Cancer Research
- Primary and OB/GYN physician awareness, education and referral support
- Move to new facility

Expansion Funding – Finalizing Business Plan proforma for application to Oishei Foundation, who will help identify other potential funders. Met with Lee Foundation, who suggested we pursue Farris Foundation, funding.

Blue Fund – Year-End Final report, Business Plan draft and 2021 budget compiled and submitted

JC Seneca Foundation – Roswell Park Center for Indigenous Cancer Research – met with teams from all parties to discuss needs and opportunities to support patient navigation, Roswell to be on-site at Tallchief Territory POD once a month.

JC Seneca Foundation – Seneca Scientific Solutions+ - University of Rochester – met with Seneca Scientific representative to understand HRSA grant opportunity with UR for which Harmonia may act as a collaborator offering telehealth

CarePanion –

Garman Grant – Year-End project report and budget submitted

Next Period Priorities – January 2022

Organization development:

Strategic Plan – Final BOD approval, determine mechanism to share with staff. Implementation planning to begin in Q1 2022

Marketing & Communications –

Video – 2-minute video completed to share on website, social media and with collaborators, staff will use it at Farmer’s Markets and outreach

Hamburg Sun – January mental health ads placed

Digital Marketing – Continuation of CarePanion Facebook ads into mid-February; Mental Health Facebook ads in creative to be finalized for 90-day placement

Development –

CMS – reevaluate steps needed to complete installation of donation page on website, upload records based on Year-End Appeal donors, begin layout of reporting dashboard

Year-End Appeal – awaiting report

Finance -

MH Business plan- Complete the financial component to support Oishei ask.

Hamburg move – Continue discussion for move realistic move date is end of third quarter 2022.

2022 Budget - participate in board meeting to present the plan

Mental Health Expansion –

Business Plan – finalize proforma

Expansion Funding –meet with grant writer to prioritize and update status of applications, share Business Plan for Oishei Foundation application as well as others

In-School Counseling – support addition of one day at Lake Shore High School and one day at Lake Shore Middle School with marketing materials; initial community training by Mental Health Advocates

Assessment Report – finalize MOU and begin supporting journal article

JC Seneca Foundation – Roswell Park Center for Indigenous Cancer Research – meeting with HCC counseling team to share information and contacts, determine HCC on-site schedule

JC Seneca Foundation – Seneca Scientific Solutions+ - University of Rochester – get more information on grant application needs and opportunities/challenges for Harmonia

CarePanion –

Garman Award – Determine desire to submit application for next grant cycle.