



To: Valerie Nowak, LMHC, CEO  
From: Marta Hiczewski MS, Managing Partner  
Date: February 11, 2022  
Re: Status Report – January 2022

### Period Accomplishments – January 2022

#### **Organization –**

**Mental Health Business Plan** – MH Business Plan – prioritize In-School program

**Strategic Priorities** – monthly review and update of HCC- Magellan priorities. Our focus in 2022 to address the three goals identified in the strategic plan and the move to the new location.

#### **Marketing & Communications –**

**Social Media** – relevant posts, #WellnessWednesdays, explore support for social media posting

**Digital Marketing** – CarePanion ad on Facebook delivered 61 calls to the office, exploring how calls were handled and outcome of call. Mental Health ads will focus on small Native geofence of select locations and MH recruitment – geofencing of competitors with counselors

**Video – 2-minute** – Finalized and uploaded to website

**Hamburg Sun** – early January ads in paper

#### **Development –**

**Year-End Appeal** – awaiting results

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

**Assessment Report** – receive data in preparation for finalization of Journal article MOU from Senecas

**Expansion Funding** – Finalizing Business Plan forecast for application to Oishei Foundation. Met with Lee Foundation, who suggested we pursue Farris Foundation, funding.

**Blue Fund** – Contract with CCNY for data collection & management support (project to begin 4/1/22) and MH digital advertising within Seneca population, recruiting and client acquisition.

**JC Seneca Foundation – Roswell Park Center for Indigenous Cancer Research** – HCC included in press conference announce arrangement

**JC Seneca Foundation – Seneca Scientific Solutions+ - University of Rochester** – provided letter of support

**CarePanion** –

**Garman Grant** – review 2022 grant application opportunity with team.

**Marketing** – Private Pay digital ads run into Feb, 61 calls tracked to HCC front office since Nov. 2021 when campaign began

**Finance** –

**MH Business Plan:** refined and updated the model to prepare the Oishei budget

**Provider productivity:** conducted meeting with Val, Megan and Michelle to review the model. Model provides good information as a starting point for setting productivity goals – and important takeaway is to identify KPI's that create value and create incentive program based on the KPI's

**Compensation:** Reviewed work of Atlas consulting. While report suggests increased compensation for certain individuals, compensation is generally in line with levels reported in the report. This is a “fine tuning” effort, not “major surgery”.

**2020 audited financial statements:** Reviewed the report and discussed with Val. The agency is in strong financial position; overall the agency is profitable and the balance sheet is strong. Harmonia is well positioned fiscally to continue to make improvements in service delivery and take advantage of growth opportunities.

**Facilities committee:** participated in meeting to discuss the potential move.

### **Next Period Priorities – February 2022**

**Organization development:**

**Strategic Plan** –Implementation planning has begun, reaching out to Goal Champions to implementation activities

**Strategic Priorities** – monthly review and update of HCC-Magellan priorities

**Marketing & Communications** –

**Digital Marketing** – contract fulfillment of social media ads and MH digital campaign

**Social Media** – meet with individual re social media outsourcing, continue to update content and share information

**Development** –

**Facebook donations** – pursue link to receive donations

**Bloomerang** – contact management software – pursue donation link to website and uploading of contacts

**Major Donors** – reach out to potential donors

**Finance –**

**MH Business plan:** Continue to refine the plan to address better estimates of service levels.

**Ovarian Cancer Opportunity:** develop template to evaluate fiscal elements of the opportunity

**Staffing:** Work with Val, Michelle to address front office and finance staffing needs.

**Hamburg move:** Begin preparation of forecast to estimate fiscal impact of move.

**Mental Health Expansion –**

**Expansion Funding** – Oishei Foundation funded \$75,000 over two years in support of In-School program to be released upon new School Program Coordinator hire.

**Business Plan** – revise School program forecasts to reflect accurate units of service

**In-School Counseling** –rework operations of Lake Shore High School following departure of MH Expansion Coordinator, connect Mental Health Advocates of WNY with Lake Shore High School supervisor to raise funds for collaboration.

**Assessment Report** – finalize MOU and begin journal article development

**CarePanion –**

**Garman Award** – prepare 2022 grant for submission by 2/28 deadline