



To: Valerie Nowak, LMHC, CEO
From: Marta Hiczewski MS, Managing Partner
Date: August 13, 2022
Re: Status Report – July 2022

Period Accomplishments – July 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 from this effort will tie to the strategic plan.

Marketing & Communications –

Marketing & Development Plan – sponsorship of Arts on the Water and Village Concert, recruitment brochure designed

Social Media – increasing following through active sharing

Digital Marketing – prioritizing mental health recruitment – working through recruitment process areas of improvement (Indeed listings, email security issues, website Careers page upgrading and link to Indeed application for MH Counselor listing). Digital ads have been paused – new ad delivery strategy will include addition geofence locations and select out for title (Mental Health Therapist, MH Counselor, Director of Mental Health, etc.)

Mental Health Expansion -

Seneca journal article – on hold – awaiting coordinator recovery

In-School Expansion – communicated challenges with Oishei and scheduled a meeting for 8/15 to review options and request continued support, MH In-School business plan revision meeting scheduled for 8/11 in preparation for Oishei meeting

Data Management – CCNY contract adjustments will include Form Lab support

Senior Services – Regular meetings scheduled with Jennifer to identify growth areas

Development -

Southtowns Chamber – Val voted onto BOD

Bloomerang – Contact Management Software – Meeting with Mary, Office Manager, for training, uploading of contacts, tracking and reporting – prep for Year-End Appeal

Finance –

Financial Statements: Review of agency financial statements for operations planning

Investment policy: continued work on investment policy

Next Period Priorities – August 2022

Organization development-

Strategic Plan –August update. SP Team prep meeting 8/13. Include Provider Productivity and the Recruitment Model as tactics under strategy 3.1 of Goal 3 – Fiscal Viability

Strategic Priorities – Organization Infrastructure, MH Clinic organization chart, clinic admin support – client experience, MH Clinic Manual update and adherence.

Marketing & Communications –

Digital Marketing – begin enhanced digital ad support for MH Counselors

Social Media – increased engagement of staff & business community

Development –

Bloomerang – contacts entered, identify upcoming opportunities with donors, financial connection to QB

Southtown’s Chamber – develop strategy to reach businesses

Finance -

Board Presentation: Work with Michelle to analyze statements and plan for Finance Committee meeting on Aug. 16th and Board meeting on Aug. 17th.

Investment Policy: Prepare draft investment policy and present at the August 16 Finance committee meeting.

Provider Productivity: continue work with CCNY to refine the productivity model.

MH School Program: Update planning model to reflect new information and to support the Oishei meeting.

Mental Health Expansion –

School expansion – define new approach, revise MH Expansion In-School Business Plan, meet with Oishei Foundation to determine opportunity to repurpose of award