



To: Valerie Nowak, LMHC, CEO  
From: Marta Hiczewski MS, Managing Partner  
Date: July 15, 2022  
Re: Status Report – June 2022

### Period Accomplishments – June 2022

#### **Organization –**

**Strategic Priorities** – Monthly prioritization focused on organization infrastructure, MH Clinic challenges – organization, marketing & financial support, investments. Determined we should add the provider productivity and recruitment efforts as separate tactics to the strategic plan.

**Board meeting** - presented strategic plan update at the June 15 meeting. An important element is key learnings as we proceed.

**Recruitment brochure** – at printer

#### **Marketing & Communications –**

**Marketing & Development Plan** – implementing plan

**Social Media** – active social media posting, increasing following

**Digital Marketing** – priority is mental health recruitment, working towards understanding internal process to deliver resumes electronically

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

**Seneca journal article** – journal article in process of development, illness of one of the authors has delayed progress at this time

**Expansion Funding** – Discussion internally regarding revising approach to School program

**Data Management** – Education Evaluation plan developed – pursuing data to build foundation for evaluation and reporting at school level; CCNY evaluating data required in system to build reporting

#### **Development -**

**CarePanion** – Garman application denied, meeting to determine what Senior programming could look like for future asks

**Southtowns Chamber** – Southtown’s BOD application submitted, exploring sponsorship opportunities

## **Finance –**

**Finance Committee:** Discussed follow up with Raj regarding allocation methodology. Our position is implement in 2023.

**Board meeting:** coaching for Michelle regarding presentation of financial information at the meeting. Harmonia has a strong balance sheet, cash for operations and investment and a \$71K YTD gain on \$965K in revenue. This represents a 7.3% net profit on sales/revenue.

**CCNY:** Participated in the update meeting. Their main focus is the data project. There does not seem to be movement on the provider productivity project. We need to consider processes and reporting to ensure we understand the VBP incentives and have a process and reporting to maximize the value/incentives.

**Investment policy:** research to obtain reference material to help us develop a policy for Harmonia.

## **Next Period Priorities – July 2022**

### **Organization development:**

**Strategic Plan** –August update. Include Provider Productivity and the Recruitment Model as tactics under strategy 3.1 of Goal 3 – Fiscal Viability

**Strategic Priorities** – MH Clinic organization support, MH recruitment, Senior programming considerations, development infrastructure, Organization Infrastructure progress

### **Marketing & Communications –**

**Marketing & Development plan** – identify story opportunities

**Digital Marketing** – identifying greater outreach to credentialed and licensed professionals

**Social Media** – increased engagement of staff

### **Development –**

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

**Southtown’s Chamber** – develop strategy to reach businesses

### **Finance -**

**On going coaching and support as needed.**

**Investment Policy:** Prepare draft investment policy and present at the August 17 Finance committee meeting.

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

**VPB Incentives:** Discuss process to ensure we understand the value reporting requirements and have a process and reporting to ensure we are maximizing the incentive. Consider having CCNY assist with specific reporting,

**Mental Health Expansion –**

**School expansion** – define new approach and schedule meeting with Oishei Foundation in August to appeal for repurposing of award