



To: Valerie Nowak, LMHC, CEO
From: Marta Hiczewski MS, Managing Partner
Date: April 8, 2022
Re: Status Report – March 2022

Period Accomplishments – March 2022

Organization –

Strategic Priorities – Quarterly meeting with SP Team. Prep work with Goal Champions. Meeting schedule through end of year in advance of BOD meetings. Update template for team

Recruitment/Onboarding brochure – more specifically lay out brochure content pages and design estimates

Marketing & Communications –

Social Media – relevant posts, including job postings, reach out to contact regarding possible social media management for proposal

Digital Marketing – MH clinician recruitment ad placed, geofencing larger non-profit counseling organizations; JC Seneca ad and landing page developed.

Website – latest round of updates finalized

Mental Health Expansion -

Seneca journal article – edited MOU and submitted to Seneca's for signatures

Expansion Funding – school program awaiting opportunity with current school-based counselor

CarePanion –

Garman Grant – awaiting response on 2022 Grant application submitted

Exhale program – support collaboration efforts providing suggestion for how to approach LOI

Finance –

Board presentation: coaching for Michelle on board presentation; start at a high level and add details as questions arise. Participated in the meeting and presented summary statistics on the strong financial position of Harmonia.

Strategic Planning Committee: presented first quarter accomplishments. Stressed the importance of the recruitment model.

Move: drafted space needs process. Participated in facilities meeting.

Recruitment Model: presented model to Val, Megan and Michelle. Made improvements to the model based on the meeting. This is a very powerful analytic tool for Harmonia.

Next Period Priorities – April 2022

Organization development:

Strategic Plan – Schedule monthly review with Goal Champions in preparation for June SP Team

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

Marketing & Communications –

Digital Marketing – increase MH recruitment ad, hold on Seneca ads until counselors replaced

Social Media – engage social media specialist, train on assets and develop schedule and connections

Communications Specialist – conversation with Mike Barone (Annual Report developer) regarding benefits of engagement

Development –

Facebook donations – pursue link to receive donations

Bloomerang – work with new office manager

Donors –Southtown’s Chamber meeting scheduled, review development plan outline

Finance –

Recruitment Model - meeting on 4/13 to address clinic hiring and the B & G and Ovarian Cancer opportunities.

New Location: determine future space needs, by location when current space needs are available.

Organization Infrastructure: Review status of work completed and develop our best approach to move forward.

CFGB investment opportunity – meeting on 4/13 to evaluate our cash and investments position and determine how much cash needs to be kept on hand and how much can be invested.

Mental Health Expansion –

Expansion Funding – In-School expansion activities paused awaiting school counselor opportunity

Business Plan – revise School program forecasts to reflect accurate units of service. Need to develop revised units of service.

Journal article – finalize MOU and determine how to proceed with article

CarePanion –

Garman Award – awaiting grant application status

Exhale Program – support Exhale application