



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

Period Accomplishments – May 2022

Organization –

Strategic Priorities – Monthly prioritization based on open items and Strategic Plan implementation.

Recruitment brochure – Cover photo and layout approved, content shared with designer.

Organization Infrastructure – in support of Strategic Plan Goal #2 – Our People – the core team is meeting to debrief Atlas Align deliverables, developing timeframe and rollout of initiatives

Marketing & Communications –

Marketing & Development Plan – drafted and presented

Social Media – oversight of social media poster, new photo permission form created and shared with team

Digital Marketing – expand geofencing to include Brylin Williamsville location, work with Incept Digital Marketing to get a new proposal focused on expanding geofencing to more competitive locations and directly to licensed professionals at those locations.

Mental Health Expansion -

Seneca journal article – using the data collected from Harmonia’s MH Expansion research Seneca Scientific+ is reaching out to UB grad students in Dean Seneca’s classes to support data integrity, comparisons across analytical tools and to write portions of the article. They are exploring multiple journal article submission criteria – American Journal of Public Health and American Journal of Psychology to start.

Expansion Funding – Oishei funds on hold awaiting hiring of School Coordinator. Further discussion to occur in MH Expansion meetings.

Data Management – Data collection and reporting project in progress, Meetings with Education, marginal populations (Native/Latino/Black) and provider productivity metrics completed. CCNY reached out to 10e11 to update system and confirm integrity of data (meaning information is being entered, but in many cases incomplete). CCNY drafting report on how to meet outcomes across organization and special programs, providing process improvement recommendations.

Development -

CarePanion – Garman Grant – awaiting response on 2022 Grant application submitted

Exhale program – LOI approved, team submitting full application

Southtowns Chamber – Southtown’s BOD application submitted, Harmonia leaders participating in some networking opportunities, developing a more comprehensive approach.

Finance –

Finance Committee: Preparation for and participation in the finance committee meeting. Discussed allocation methodology for Raj’s report. We need to add a management discussion and analysis report for the finance committee meetings and include KPI’s

Investments: participated in investment presentation. This was the first time the investments advisor presented. We have a understanding of what type of returns the portfolio has generated. We need to compare this to the CFGB performance.

1st quarter budget review: Participated in the budget review. The program managers talked about service delivery and we coupled this with the financial results. Financial performance is not as strong as last year, but still good given the hiring challenges

CCNY: follow up meeting to discuss provider productivity and the problems with the 10e11 report. Sent copy of the spreadsheet Michelle and I prepared.

Next Period Priorities – June 2022

Organization development:

Strategic Plan – June SP Team – review Goal Champion reports in preparation for June BOD update meeting

Strategic Priorities – monthly review meetings set objectives for June around next steps in building a strong Organization Infrastructure, Mental Health Expansion options, Data-development project, Marketing and Development, Mental Health Clinic organization project.

Marketing & Communications –

Digital Marketing – identifying greater outreach to credentialed and licensed professionals

Social Media – oversight of social media manager, expand followers

Development –

Facebook donations – pursue link to receive donations

Bloomerang – work with new office manager for set up and updating

Southtown's Chamber – Quarterly Exchange network meeting in June

CarePanion – Garman Award – awaiting grant application status

Finance:

MH Expansion: update the model with updated units of service in preparation for future opportunities.

Investment Policy: Prepare draft investment policy for BOD.

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

Finance Committee Follow up: Follow up on allocations discussion and determine communication with the committee.

Mental Health Expansion –

School expansion – decision made to pause school program above what is currently being provided at Lake Shore High School two days a week (which is an increase over prior years), meet with Oishei to alert foundation to the necessary shift in priority based on the immediate hiring needs of MH clinic.

Journal article – support article