

## **Harmonia CEO and Service Report 5/15/24**

### **CEO Report**

*-submitted by Valerie Nowak, CEO*

#### Consulting/Vendor Update:

##### Magellan Group

- April report attached.

##### Incept-Mike Davern

- Digital Recruitment Campaign
  - Campaign approved and has begun; receiving weekly performance reports
- Web re-design
  - Exploring grant funding. Minimal changes are being made in interim for cost-effectiveness.

##### Jessica Russo

- Continued monthly posts as per contract. Jessica has been strongly pushing the Garden Party event.

##### Bonadio

- Beverly continues to meet with Paul on a bi-monthly basis to address compliance and assist with regulatory changes and building Harmonia's Compliance Plan.

##### Gross-Shuman

- Community Concern Foundation
  - COI Amendment – Successful filed
    - Awaiting update.
- CRS Companies
  - Contact with John "Skip" Cerio
    - No contact; plan to write letter to attorney and CC Skip.
- Board Policies – received Anti-harassment and Whistleblower for review by Governance.

##### ESC

- Continue to work on implementation with internal team and projects.
- Meeting scheduled 5/14 to level-set and clear up misunderstandings

##### Upper Edge Consulting

- May monthly meeting postponed to 5/13.
- Pursuing/considering:
  - Health Foundation – Continue/Expand Caregiver's series
  - OMH MHOTRS Clinic Enhancement Grant – Underserved population expansion
  - Kyrias – Technology Capacity (laptops, cell phones)
  - OMH Stigma Reduction – Stigma reduction to underserved population
  - Tower –Website redesign
- Current status:
  - Loan Repayment Grant – awaiting decision
  - DOH Statewide HCFT – Construction (roof, water remediation) – awaiting decision
  - Mother Cabrini for school programs (continued funding) -- submitted

Atlas Alignment – Diana Southall

- Meeting internally 5/9 regarding decision on pay structure for 2024. Using Greg Hiczewski of Magellen for assistance.
- Diana to return for discussion with Leadership Team late May.

#### Jerry Bartone

- Engaged Jerry Bartone to compile and analyze service stats for MH clinics for 2023.
  - Project completed. Will use for annual report and for general information.

#### Facilities:

- Derby roof replacement and building repairs – exploring NYS DOH Facilities grant.
- Building exploration:
  - First “Vision and Planning” Workgroup held 4/26.
    - Val prepared and led meeting in a Creative Problem Solving exercise.
    - Will meet monthly. Next meeting 5/20.

#### Other business:

- Jessica Slomiany, LCSW will begin in Mental Health Programs Manager
  - Will begin on 5/20 at 21 hrs/week – with intent to grow into full-time in 2-3 months.
- “Spring Update” sent to 100 town legislators, grantors and supporters. Handwritten notes included when appropriate for personal touch.
- Business First – Table of Experts
  - Published in the May 3<sup>rd</sup> edition of Business First
  - Nice representation of our agency and increased exposure. We have never done this before.
- Significant time in April spent on Garden Party – requests for gift cards, auction items and ticket sales.

#### **Mental Health:**

*-submitted by Laura Spencer, Dir of MH Clinics*

#### Clinic Updates:

- Programs Manager is expected to start on May 20<sup>th</sup>, working 3 days per week
- One clinician left suddenly on April 16
- 1060 clients; 3 prescribers, 11 clinicians, 1 interns.
- The waitlist for Derby location is continuing to be worked through as clinicians in this location have discharged patients. Hamburg continues to have a waitlist, which is anticipated to grow now that we have lost another clinician. Hiring continues to be a struggle but the goal is to increase the total clinician count to 16.
- Laura continues to make small adjustments to clinic processes to address no show rates and billing gaps to address clinic flexibility efficiency and efficacy. Two examples of these are client engagement policies taking effect in May.

#### Clinic Regulations and Compliance

- Identified areas of improvement needed to assure proper chart compliance in alignment with 599 Regs and billing requirements – process continues and is moving forward with focus transitioning to treatment plans in May.
- Dawn Ferguson, consultant:

- **Status:**
  - Chart Audits, progress note, and treatment plan writing clinics continue. Dawn and Laura will work on Clinic Manual starting in May.

Value Network:

- Highmark, Amerigroup, and Monroe-Molina Plans Contract – Metrics Monitoring continues. Laura will head up and report CQI updates at bi-monthly meetings. Dashboards will be updating soon (from 1<sup>st</sup> quarter data).

OMH Overdose Prevention CQI

- Laura will address this with staff to discuss obstacles to the treatment of this population and any other issues that remain.

CCNY data/Dashboard Project:

- Dashboard meeting was held on April 30<sup>th</sup> and indicated modest improvements in productivity despite changes in documentation. Also identified further areas to focus on to assist staff on managing charts and time more appropriately.

Growth Opportunities:

- In-School Counseling Program, “Turn-It-Around”:
  - On-site services are provided 2 days per week at Lake Shore High School by 1 clinician.
  - Mother Cabrini Health Foundation award looking for ways to expand reach into other schools. Menu for trainings and consultations are still in development. About three staff have expressed interest and offered ideas. We have submitted a grant with Mother Cabrini to continue this into a second year.
- Laura, Marta, Greg and Val met a second time regarding the MH business plan and discussed opportunities to expand our current offerings and will round this out in a third meeting in May.

**Health Homes:**

*-submitted by Kristy Gasiewicz, HH Program Director*

Current Status:

- Health Home referrals remained the same in April. As a result of referrals and engagement, Health Homes enrolled 6 clients, down from last month. Difficulty with finding clients and hospital discharges made it difficult to find and enroll clients.
- Health home had a total of 14 Health Home + clients enrolled. We were able to bill the full rate for 11 of those clients which is \$750 minus HHUNY administrative fee. The remaining 2 HH + clients we billed at a lower rate of \$363.60, due to not being able to get the 4 billable contacts with providers or face-to-face contacts with clients. The other HH + client was a transfer from another Care Management Agency. Several attempts were made to contact the client and no response, did not have releases to attempt contact of providers for this client. Of those 14 HH + clients 1 client was closed due to not wanting services anymore.
- Clients that were discharged this month graduated from Health Home, moved out of the county, extend stay in hospital, long term rehab for substance abuse or disengaged from services.
- Resumes received this month for open HH positions. Scheduling interviews.

Growth Opportunities:

- HH+ Grant-OMH:
  - Kristy began expending funds which support HH+ clients in need.

- Kristy is developing time-line for grant management and reviewing with Michelle, Val and Marta.
- Met with Michelle to discuss how to distribute the Health Home Plus grant and to budget for a potential health home staff in the upcoming quarter.

**Senior Services:**

*-submitted by Jennifer Gunia, Senior Services Program Coordinator*

Case Management General Updates

- Working on Completion of SS Business Plan-Next Meeting 5/9.
- Jen and Taylor will be working on this. Created and mailed out 80 client surveys across Case Management System. Will prepare results for July.
- T-Care Program: Christy is trained. One new assessment completed in April.

CarePanion General Updates:

- Limited County Bid List continues – the County not releasing more people in need poses a hiring /sustaining hours problem.
  - 6 New County Clients acquired for services.
  - 2 County Clients on hold – due to hospitalization and client availability.
- RFP for PCA I Home Care Service granted on 3/18. New Contract Begins
- PCA I Home Care Service began 4/1. Home Visits are being conducted bi-annually to ensure quality of care.

WNYICC:

- Current cases:
  - Community Health Coach: 3 Active
  - Caregiver Program: 1 Active
  - Healthy Ideas: 2 New but both closed and one of them moved into Falls Prevention.
  - Falls Prevention: 4 Active
  - Ground Game (new contract signed)- still waiting on training date.

Growth Opportunities:

- Grants
  - Exhale (3 yr grant)
    - “Pathways” project meeting held 1-2x per month.
      - 4/12- Monthly Zoom Pre-Meeting.
      - April Session Held 4/18 at Cradle Beach. Next Session 5/16.
  - Wilson Legacy Grant (1 yr grant)
    - Caregiver Support Grant Ended, will be working on finalizing report, which is due in June.
  - Met with Upper Edge on 4/11 to discuss Health Foundation Grant. Discussed expanding Caregiver Support Grant. This is a rolling grant with a suggested application date of 5/31. Will be meeting again May 20

**Compliance/HR Report:**

*-submitted by Beverly Eagan, HR and Compliance Specialist*

**Human Resources:**

#### New Hires:

- Kathrine Hoysen – Revenue Cycle Manager

#### Open Positions:

- Mental Health Clinicians (3 at Derby and 3 at Hamburg)  
Health Homes Case Manager  
CarePanion (ongoing)

#### Voluntary Terminations:

- Gabe Birkby – Mental Health Clinician

#### Human Resources:

- ESC: Two ongoing projects.
  - Employee Handbook: Being reviewed by the Dir. of Finance and HR. Once this review is completed any changes requiring CEO approval will be reviewed with the CEO and then the Handbook will be approved for ESC to post.
  - Job Descriptions: Being reviewed.
- Recruiting.
  - Passive campaign efforts continue. A second “follow up” letter has been drafted and will be going out to some people we have already reached out to.
  - Campus recruiting - tabling event scheduled at the University of Buffalo, Amherst campus.
  - Harmonia participated in a job fair sponsored by the Urban League.
    - This is important for our diversity efforts. Unfortunately, it was not well attended.
  - ESC provided a training session to the leadership team so they can access possible candidates and maneuver comfortably on the platform. As a follow up, HR will provide a guide for leadership to access for easy reference.

#### Compliance:

- Work with Bonadio continues. April meeting was cancelled. Planning May meeting to review the Compliance Plan following his assessment. He will also review my Work Plan.
- Annual cyber-security training was provided for all staff.
- I will be working with Dawn Ferguson to wrap up the clinical file audit.
  - Will serve as a quality improvement tool for evaluating and improving patient care and outcomes.
- The Compliance committee meeting was postponed until May in order to give leadership enough time to conduct a thorough evaluation of risks in their departments and programs.