

Harmonia CEO and Service Report 6/20/24

CEO Report

-submitted by Valerie Nowak, CEO

Consulting/Vendor Update:

Magellan Group

- May report attached.

Incept-Mike Davern

- Digital Recruitment Campaign
 - Campaign approved and has begun; receiving weekly performance reports – monitored by HR.
- Web re-design
 - Grant to Tower Foundation submitted.

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
 - Received filing receipt
- CRS Companies
 - Contact with John "Skip" Cerio
 - No update
- Policies – received Conflict of Interest, Anti-harassment and Whistleblower for review by Governance.
 - Some questions around if these are policies of the Agency or of the Board and if the designated officer for reporting exists internally or at the Board level. Val is exploring with Nick.

ESC

- Continue to work on implementation with internal team and projects.
- Meeting held 5/14 to level-set and clear up misunderstandings
 - Developed plan for updated PTO accruals Policy which ESC will add to updated handbook – will adopt lump sum vs accrual of PTO for 2025. Made other adjustments as fail-safe measures.

Upper Edge Consulting

- June monthly meeting held 6/5.
- Pursuing/considering:
 - McKean Fund – Support for Alpha-Stim – MH
 - O'Reilly Automotive Foundation – Senior Care
- Current status:
 - Loan Repayment Grant – awaiting decision

- DOH Statewide HCFT – Construction (roof, water remediation) – awaiting decision
- Mother Cabrini for school programs (continued funding) – submitted
- OMH Stigma Reduction – submitted
- Tower – web redesign – submitted
- Kyrias -- Technology/Capacity – in process
- HFWCNY – Caregiver Series – in process

Atlas Alignment – Diana Southall

- Diana presented in compensation plan for 2024 to the Leadership team on 5/29.

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 – NYS DOH Facilities grant.
- Building exploration:
 - Second “Vision and Planning” Workgroup scheduled for 6/28.
 - Rescheduled from 5/20 due to Garden Party priority.
 - Marta will be taking over as lead facilitator.

Other business:

- Significant time in May/June spent on Garden Party – requests for gift cards, auction items and ticket sales and meetings.
- Significant time spent on development of 2024 compensation plan (with HR and Finance). Plan was presented to Leadership on 5/29 and “level up” salary adjustments will be made mid-June (where indicated). Reviews will be completed over summer months and merit raises will be processed in October.
- Agency meeting held 6/5. Many staff attended. Praise and acknowledgements offered and staff was updated on 2024 compensation plan. Val addressed rumors about agency closure and other items and encouraged staff to come to me if there are any questions. Educated on the toxicity of rumors and mistruths.

Mental Health:

-submitted by Laura Spencer, Dir of MH Clinics

Clinic Updates:

- Programs Manager started on May 20th and is working 3 days per week; Jessica is a great fit for our organization and is picking up responsibilities quickly
- Interviewing continues – we have hired one clinician with a July 1 start; two are expected to begin in Sept (one is a return employee, anticipated to work part time; one is an intern); we are hoping to hire two more as they plan to graduate in August
- 1021 clients; 3 prescribers, 11 clinicians, 1 intern.
- We suffered a terrible loss due to the sudden passing of one of our clinicians on June 5; this was a blow to us all. Additionally, another clinician gave notice on June 6 and will be leaving on June 21. Despite the new hire, and the addition of our clinics Program Manager, we will not be able to cover these losses quickly and it is anticipated that our waitlist will grow

- The Clinics director continues to explore new revenue streams to balance hiring obstacles and enhancing growth opportunities

Clinic Regulations and Compliance

- All staff were trained on treatment plan compliance on May 15; some obstacles to 10e11 functionality remain but these are minor and should not interfere with compliance long-term
- Dawn Ferguson, consultant:
 - **Status:**
 - Chart Audits continue; Clinics Manual writing with Clinics director has begun and is in editing stage. Plan is to send to HR and CEO for final draft and approval by June 15

Value Network:

- Highmark, Amerigroup, and Monroe-Molina Plans Contract – Metrics Monitoring continues. Still no information on Q1 metrics

OMH Overdose Prevention CQI

- No updates

CCNY data/Dashboard Project:

- No updates

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.
 - OMH grant was submitted to reduce stigma in rural population; plan is to do this through schools – probably LSHS, possibly Silver Creek
- Mental Health Business Plan: On-hold until after Garden Party.

Health Homes:

-submitted by Kristy Gasiewicz, HH Program Director

Current Status:

- Health Home referrals remained the same in May. As a result of referrals and engagement, Health Home enrolled 6 clients, down from last month. Difficulty with finding clients and engaging with clients made it difficult this month. Many HH+ clients are homeless living in hotels, shelters or on the street w/no means of contacting them.
- Health Home had a total of 15 Health Home + clients enrolled we enrolled 3 new HH + clients this month. We were able to bill the full rate for 12 of those clients which is \$750 minus HHUNY administrative fee. The remaining 3 HH + clients we were not able to bill due to not being able to get the 4 billable contacts with providers and or the client. Of those 15 HH + clients we will lose 2 clients this month. This is a result of 60 days no contact and the other client has been HH + a year and no longer qualifies for HH + services. That client will continue to receive services however we will not be able to bill at the rate of \$750, we will now only be able to bill at the rate of \$200.
- Health Home was not able to bill for 9 clients in the month of May due to loss of contact.

Growth Opportunities:

- HH+ Grant-OMH:
 - Health Home continues to utilize grant money from the HH+ grant. Basic needs have been met for clients that we were not able to meet prior to the grant.

- An MOU was developed with Friends of Night People to outreach twice a month to generate more referrals for HH+ clients. Establishing a relationship with shelters in the community is a requirement for the HH + grant. The MOU was sent and we are waiting on approval from Friends of Night People.

Senior Services:

-submitted by Jennifer Gunia, Senior Services Program Coordinator

Case Management General Updates

- Working on Completion of SS Business Plan-Presentation to Board June 20
- Created and mailed out 80 client surveys across Case Management System will report findings in July.
- T-Care Program: No longer using this platform. Assessments for caregivers rolled into Peer Place. Christy is trained. One new assessment completed in May.

CarePanion General Updates:

- Limited County Bid List continues – the County not releasing more people in need poses a hiring /sustaining hours problem.
 - 1 Private Pay Client on hold due to client availability.
 - 2 New County Clients acquired for services one of them declined help.
 - 1 County Client on hold – due to client availability.
- 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: 0
 - Falls Prevention: 6 Active
 - Ground Game (new contract signed)- Initial 4.5 Hour Training was completed. Next Q & A/Training scheduled for 6/12

Growth Opportunities:

- Grants
 - Exhale (3 yr grant)
 - “Pathways” project meeting held 1-2x per month.
 - 5/10- Monthly Zoom Pre-Meeting.
 - May Session Held 5/16 at Cradle Beach. Next Session 6/20.
 - Wilson Legacy Grant (1 yr grant)
 - Caregiver Support Grant Ended, will be working on finalizing report on June 12th.
- Met with Upper Edge on May 20 discussed Health Foundation Grant moved suggested grant application date to 6/15 as this is a rolling grant. Discussed expanding Caregiver Support Grant. Next Meeting 6/6

Compliance/HR Report:

-submitted by Beverly Eagan, HR and Compliance Specialist

Human Resources:

New Hires:

- Jessica Slomiany – Mental Health Programs Manager

Open Positions:

- Mental Health Clinicians
- Health Homes Case Manager
- Revenue Cycle Manager
- CarePanions
- Front Desk Assistant

Involuntary Terminations:

- Kathy Hoyson – Revenue Cycle Manager

Human Resources:

- ESC: Two ongoing projects.
 - Employee Handbook: Final review by the Dir. of Finance and HR. To be completed before the end of the month.
 - Job Descriptions: Completed.
- Recruiting.
 - Recruiting efforts continue to be a primary focus for HR with a continuous cycle of postings candidate sourcing and passive recruiting.
 - We are continuing to build connections in the Behavioral Health Community, on LinkedIn. This seems to be attracting students and professional applicants.
 - Diversity Outreach has been another recent part of candidate sourcing. Besides April's outreach to the Buffalo Urban League we have a print and website ad in the Buffalo Latino Village which will run through the month of June.
 - We have increased our passive recruiting efforts. We now have a follow-up letter. This features one of our counselors and includes a quote. People seem to respond to employees with positive things to say about their employer.
 - Margie did some investigative work and obtained some valuable information about the rates of pay, benefits, and employee experience. Harmonia is certainly strong in the running.
 - Incept's weekly Tap reports have been helpful regarding our marketing campaign
 - We have been partnering with Laura in her recruiting efforts. HR has been conducting phone interviews and scheduling interviews as requested. Laura has been interviewing and has some good candidates.

Compliance:

- The Compliance committee met in May. Program/department risk assessments were submitted. These will then be transferred to our "risk register" for tracking purposes.
- The Clinical File Audit was completed with the assistance of Dawn Ferguson and will be presented to the Board in June.
- Met with Paul from Bonadio. He provided me with the information I need to update the compliance plan. Updates were based on OMIG's recent release of new standards for each element of the Compliance Program.