



STRATEGIC PLAN FY09-FY12

The strategic plan has been divided into 5 distinct focus areas. Each area is seen as a core component of the inner working of the agency which requires specific goals and objectives to ensure agency stability and growth. The goals and objectives within each of the five focus areas have been developed by applying the CARF ASIPRE model which incorporates the following areas:

- A**ssessment of Environment
- S**etting the Strategy
- P**erson Served and stakeholder Feedback
- I**mplementation of a Plan
- R**eview of Results
- E**ffect a Change

Finance

Finance Priorities

- I. Increase and diversify revenue sources
- II. Fundraising
- III. Maintain sound clinical services while enduring reduced funding from the state.
- IV. Increase financial accountability of clients in fee collection and collection of billing data
- V. Manage factors influencing budget such as payor sources, revenue vs. expense

Goals

Finance Goal

I. Increase and diversify revenue sources

Objectives	Implementation Plan
A. Develop new contracts and programs	<ul style="list-style-type: none"> ▪ Assess current contracts to look for possible expansions within our areas of expertise ▪ Expand/ market community training/ education which can be fee based ▪ Assess opportunities to partner with for-profits
B. Fundraising	<ul style="list-style-type: none"> ▪ Letter campaigns ▪ Grants
C. Increasing insurance revenue	<ul style="list-style-type: none"> ▪ Fee for service staff ▪ Admissions Committee Screening ▪ Assess options for paneling staff
D. Increase financial accountability of clients	<ul style="list-style-type: none"> ▪ Increased oversight of collecting fees at time of service ▪ Review of past balance prior to re-admitting a client to the agency ▪ Clinicians increased knowledge of client balances to reinforce payment at time of service ▪ Collections agency
E. Increase billing efficiency	<ul style="list-style-type: none"> ▪ Staff completion of necessary documentation for billing ▪ Enhance technology for documentation and billing processes

Finance Goal	
II. Manage reduced funding from the state of Ohio	
Objectives	Implementation Plan
A. Track state events which will impact funding	<ul style="list-style-type: none"> ▪ Medicaid match ▪ 408 Annual Funding
B. Assess SMD county system at large to project impact of potential cuts.	<ul style="list-style-type: none"> ▪ Work with ADAMH to assess ways to gain efficiencies in the system at large
C. Prioritize services based on clinical area and demand	<ul style="list-style-type: none"> ▪ Review patterns of service use by client clinical profile to determine which services have greatest impact on client stability/ quality of care
D. Implement cuts to the agency budget which has the least impact to client and agency stability.	<ul style="list-style-type: none"> ▪ Apply cutbacks in programs which will allow the agency to maintain a balanced budget without sacrificing overall care to current client base

Finance Goal	
III. Maintain an overall balanced budget for the agency	
Objectives	Implementation Plan
A. Precise tracking of monthly financials to control costs and maintain expenses within available revenue.	<ul style="list-style-type: none"> ▪ Review of monthly financial statements for the general agency as well as contracts
B. Communicate financial standing of the agency to staff and stakeholders	<ul style="list-style-type: none"> ▪ Consistent updates to staff at directors and all staff meetings as information is available ▪ Consistent individual and department productivity information to be provided to staff ▪ Updates as available to staff on state/ county funding issues
C. Increase oversight in budget areas which are highly volatile, i.e. central pharmacy, placement, etc.	<ul style="list-style-type: none"> ▪ Monthly tracking of expenditures ▪ Implement immediate cutbacks throughout the year as revenues fall under levels which will allow for balancing the budget by year end

Programs	
Program Priorities	
I.	Add AOD services to the current service array.
II.	Assess staffing patterns in ES to ensure ample coverage
III.	Increase availability of CSP
IV.	Explore partnering with other entities such as VNS to expand service access
V.	Develop clinical resources specialized to the 18-25 year old client
VI.	Integrated healthcare model
VII.	Create ways for clients to integrate into the community more, volunteerism, use of resources
VIII.	Offer specialized group counseling, high demand for anger management.

Goals	
<i>Program Goal</i>	
I. Develop programming to meet current demands for specialized services	
Objectives	Implementation Plan
A. Develop counseling groups to focus on short-term interventions for anger management, anxiety/ stress, self-esteem, symptom management, etc.	<ul style="list-style-type: none"> ▪ Acquire needed staff to conduct groups ▪ Plan specific group content ▪ Market groups internally and to the community
B. Develop clinical groups to target the needs of young adults within our SMD population.	<ul style="list-style-type: none"> ▪ Assess current caseload/ current needs ▪ Define specific group content which will be most critical for the young adult population ▪ Market the groups internally and to the community
C. Develop the ability to provide AOD services to the SMD population at Alternative Paths	<ul style="list-style-type: none"> ▪ Assess funding needs ▪ Explore options for funding part-time or full-time staff who specialize in AOD treatment ▪ Apply the IDDT or modified IDDT concept to the treatment provided.
D. Increase integration between AP programming and community to enhance the client’s ability to expand community experiences and increased independence.	<ul style="list-style-type: none"> ▪ Agency staff to assess ways to bridge community experiences with current treatment offered ▪ Explore options for volunteerism or prevocational opportunities for clients

<p>E. Assess current trends within the overall population to ensure we are ready/ able to meet demand as they increase in our community, i.e., geriatric population</p>	<ul style="list-style-type: none"> ▪ Identify specialized populations within our community ▪ Assess our clinical competence in treating special populations identified ▪ Assess options for increasing our ability to reach/ serve specialized populations <p>Assess funding options we can pursue to develop specialized services</p>
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<i>Program Goal</i>	
II. Explore options for providing integrated healthcare for clients	
Objectives	Implementation Plan
<p>A. Explore funding options</p>	<ul style="list-style-type: none"> ▪ Assess funding models that currently exist in the state ▪ Research funding through Medicaid ▪ Assess total costs involved in offering the service
<p>B. Research models that have been implemented in the state at agencies similar to Alternative Paths</p>	<ul style="list-style-type: none"> ▪ Contact agencies currently doing integrated healthcare to learn from their process/ plan site visit
<p>C. Assess options for partnering with other community resources</p>	<ul style="list-style-type: none"> ▪ Research opportunities to work with resources such as Health Ministries, Health Department to create resources
<p>Join group being formed by ODMH to help agencies create integrated healthcare programs</p>	<ul style="list-style-type: none"> ▪ Attend state meetings and trainings offered ▪ Follow progress on state initiatives

<i>Program Goal</i>	
III. Meet demands for clinical services by providing optimal staff and service resources within the current financial means of the agency	
Objectives	Implementation Plan
<p>A. Assess needs for clinical services being demonstrated in the community</p>	<ul style="list-style-type: none"> ▪ Needs assessment surveys ▪ Tracking requests for services ▪ Tracking county/ state trends in service use/ factors impacting needs ▪ Community networking
<p>B. Effectively manage requests for services and waiting lists</p>	<ul style="list-style-type: none"> ▪ Measure patterns/ trends in requests for services by clinical needs as well as payor sources ▪ Prioritize clients by most in need along with options for payor sources to ensure agency ability to provide services within financial resources ▪ Maintain active management of waiting list to ensure current status and appropriate referrals to other agencies if appropriate
<p>C. Assess staffing patterns and</p>	<ul style="list-style-type: none"> ▪ Assess demands for service in each of the core service areas vs. clinical time

coverage for core services	<p>available</p> <ul style="list-style-type: none"> ▪ Review current staffing patterns to ensure maximization of resources ▪ Look at options to shift or later staffing patterns to meet demands to include assessing financial needs for staffing
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Community	
Community Priorities	
I. Continue marketing/ PR efforts with stakeholders as well as the general community	
II. Increase client integration in the community to work on reducing stigma	
III. Increase community education about MH	
IV. Strengthen and build on current community relationships.	
V. Strengthen involvement with families and consumer support persons	

Goals	
<i>Community Goal</i>	
I. Increase community awareness of agency mission and programs	
Objectives	Implementation Plan
A. Marketing	<ul style="list-style-type: none"> ▪ Printed materials ▪ Speaking engagements ▪ Advertising ▪ Cable ▪ Website ▪ Internet resources (YouTube page/ video on the agency)
B. Attend Community Health Fairs	<ul style="list-style-type: none"> ▪ Track health fairs that occur in the community ▪ Obtain marketing materials needed at health fairs
C. Build relationships and educate community healthcare providers, i.e. general practitioners	<ul style="list-style-type: none"> ▪ Mailing to family practices ▪ Meet face to face with practitioners ▪ Meet with local hospitals regularly

Community Goal	
II. Provide education in the community to increase understanding of mental illness and reduce stigma	
Objectives	Implementation Plan
A. Develop educational opportunities that we offer to the general public	<ul style="list-style-type: none"> ▪ Provide in-services ▪ Newspaper articles/ use media resources ▪ Explore use of the internet
B. Respond to requests for specific mental health training/ education	<ul style="list-style-type: none"> ▪ Develop specialized training to meet requests
C. Involve clients in the process of educating the community	<ul style="list-style-type: none"> ▪ Consumers to speak ▪ Written materials that include client stories ▪ Plan an annual event which educates the community and recognizes clients as well as mental health supporters

Community Goal	
III. Maintain and cultivate strong relationships/ partnerships with stakeholders	
Objectives	Implementation Plan
A. Identify who are current stakeholders are and who we need to reach out to in developing new relationships	<ul style="list-style-type: none"> ▪ Assess who are current stakeholders are ▪ Assess current community and sociological trends which may create demand in developing new relationships
B. Maintain open communication to enhance collaboration	<ul style="list-style-type: none"> ▪ Attend community collaborations, meetings, committees ▪ Participate on committees related to agency services/ operations ▪ Remain active in community organizations that are not healthcare related to build contacts, i.e., chamber of commerce, Leadership Medina, etc.
C. Develop opportunities to engage families	<ul style="list-style-type: none"> ▪ Assess what families needs/ desire from the agency ▪ Provide educational opportunities for families which may include public speaking, written materials and opportunities to be a part of the treatment process if clinically appropriate ▪ Work cooperatively with NAMI to support their current initiatives such as Family to Family

Human Resources

Human Resource Priorities

- I. Recruit volunteers for support roles within the agency
- II. Staff training
- III. Maintain open communication with staff.
- IV. Maintain competitive salary and benefits for staff to retain quality staff

Goals

Human Resource Goal

I. Increase employee education and training

Objectives	Implementation Plan
A. Investigate opportunities for employees to further their formal education, i.e. college courses	<ul style="list-style-type: none"> ▪ Explore grants ▪ Be a site for interns/ students ▪ Communicate educational opportunities to staff
B. Provide interdepartmental cross training at the agency	<ul style="list-style-type: none"> ▪ Develop and implement a plan for staff to shadow or cross train with other staff to increase general awareness of roles and responsibilities
C. Provide all required trainings for agency accreditation and build in trainings of special interest defined by staff	<ul style="list-style-type: none"> ▪ Maintain calendar of required trainings and track completion ▪ Solicit feedback from staff on trainings that they believe would be helpful to them in their roles

Human Resource Goal

II. Maintain good communication with staff

Objectives	Implementation Plan
A. Enhance employee orientation and ongoing communication about personnel policy, benefits, etc.	<ul style="list-style-type: none"> ▪ Explore ways to best communicate information to staff via written materials, computer based, etc. ▪ Assess need for an employee handbook vs. policy manual
B. Utilize department and staff meetings to keep staff current on clinical and administrative issues impacting the agency	<ul style="list-style-type: none"> ▪ Department director meetings ▪ Weekly staff meetings ▪ Meeting minutes available via computer and posting sites in staff room

<i>Human Resource Goal</i>	
III. Maintain quality staff	
Objectives	Implementation Plan
A. Salary	<ul style="list-style-type: none"> ▪ Assess competitive salary levels through use of Ohio Council Salary Survey ▪ Provide optimal salary as permissible within budgetary constraints
B. Benefits	<ul style="list-style-type: none"> ▪ Annually assess current benefits as well as potential benefits for staff ▪ Provide optimal benefits as permissible within budgetary constraints
C. Culture	<ul style="list-style-type: none"> ▪ Promote positive work environment ▪ Promote team focus in administrative and clinical work

Technology
Technology Priorities
I. Upgrade phones
II. Begin to explore electronic health records
III. Develop more efficient databases to track ES/ placement
IV. Use technology to increase documentation efficiency
V. Provide increase training on current and future technology.

Goals	
<i>Technology Goal</i>	
I. Implement a new phone system to meet the current needs of the agency	
Objectives	Implementation Plan
A. Conduct a thorough assessment of agency phone needs	<ul style="list-style-type: none"> ▪ Review current system and assess where needs are not met ▪ Create list of system functions critical to agency operations ▪ Assess options for emergency phone backup in the event of system failure to ensure the agency can still operate
B. Research phone systems available to meet current needs	<ul style="list-style-type: none"> ▪ Meet with vendors to explore systems ▪ Secure quotes for systems which best fit our needs
C. Apply for funding through the ADAMH board to purchase the new phone system	<ul style="list-style-type: none"> ▪ Provide detailed summary of research done on systems with a proposal to purchase the system best fitting our needs
D. Purchase and implement new system	<ul style="list-style-type: none"> ▪ Purchase system ▪ Acquire installation of new system ▪ Design and implement training for staff

Technology Goal	
II. Move agency to use of electronic health records	
Objectives	Implementation Plan
A. Identify and meet with agencies similar to AP who are currently using electronic health records	<ul style="list-style-type: none"> ▪ Work with Ohio Council and local resources to identify agencies who are using electronic health records ▪ Plan site visit ▪ Participate in ODMH or Ohio Council Committees which are working on electronic record implementation
B. Assess health record software that is compatible with our current billing software	<ul style="list-style-type: none"> ▪ Contact Xact to get information about current healthcare record software available through them ▪ Obtain demo if possible ▪ Talk with other agencies that have implemented the software
C. Explore alternatives for funding the purchase of software and hardware needed to fully implement electronic health records	<ul style="list-style-type: none"> ▪ Develop a budget ▪ Research grants ▪ Explore funding request with ADAMH

Technology Goal	
III. Develop and implement ways in which our current practices can be computerized to gain efficiencies in our day to day operations	
Objectives	Implementation Plan
A. Complete a system analysis to look at all of the ways we are currently using technology to document	<ul style="list-style-type: none"> ▪ Conduct an assessment of the current computerized practices within each department ▪ Assess ease of use and functionality of current practices ▪ Make any changes necessary to enhance current computerized operations
B. Complete a system analysis to assess practices that can be moved to an electronic format, i.e., ES/ Placement/ Service requests, etc. tracking	<ul style="list-style-type: none"> ▪ Conduct an assessment of the manual/ paper based practices within each department ▪ Review ways in which computerization can replace current practices and the process / tools required to do so ▪ Develop a plan to implement electronic documentation/ data collection within agency resources
C. Work with ADAMH IT staff to design and implement needed software/ resources.	<ul style="list-style-type: none"> ▪ Provide outcome of above analyses to ADAMH ▪ Prioritize requests based on need and opportunities to enhance agency operations