

Strategic Plan

MIDDLE FLINT BEHAVIORAL HEALTHCARE

JULY 2011 STRATEGIC PLAN

INTRODUCTION

Middle Flint Behavioral HealthCare has participated in formal strategic planning activities in approximately 3-year cycles for the last fifteen years.

This year's planning process has involved staff, consumers, a planning consultant, and members of the agency's governing Board. The resulting plan is an outgrowth of the previous strategic plan, as well as annual operational plans developed by the agency. However, a recent environmental scan and review of recent outcome data have led to the development of a plan that better addresses current needs, while staying true to standing priority/focus areas.

The purpose of the agency's strategic plan is to provide a blueprint for the goals and activities of the organization over the next three years. The plan provides direction for Board and agency leadership, the development and use of the agency's financial resources, the development of its services, infrastructure, and human resources, and its outreach into local communities.

The plan ensures that agency services and activities are relevant, timely, and congruent with its overall mission and vision.

Finally, the strategic plan serves as the template for annual operational plans and outcome management plans that outline specific annual objectives, strategies, and targeted outcomes. A close alignment between the Board's strategic plan and individual unit priorities is critical to an integrated planning process – one which involves all levels of agency leadership, as well as its stakeholders.

The strategic plan and each year's operational plan will be posted on the agency's website, so that stakeholders will have access to the information and have opportunities to provide input into the ongoing planning process.

ENVIRONMENT SCAN

In order to develop priorities and goals which are timely and relevant, an organization should periodically conduct an "environmental scan," by reviewing its current status and making an objective analysis of its internal strengths and weaknesses, as well as potential opportunities and challenges or threats.

As part of this year's planning process, potential factors were identified which might affect agency success in achieving its mission, and the organization's status in meeting current priorities was evaluated. To obtain needed information, the following methods were used:

- Discussions with executive leaderships and the governing Board
- Discussion of agency focus areas with consumers
- Review of the results of the most recent consumer satisfaction survey
- Review of the results of the most recent outcome management plan

Based on the information derived from these methods, a format SWAT analysis was developed. Below are its findings in each of the review areas.

STRENGTHS

- Senior leadership with long organizational tenure
- Committed Board members with long tenure
- Commitment to major IT improvements
- Overall fiscal solvency
- Recent clinical innovations; e.g., telemedicine

WEAKNESSES

- Infrastructure deficits; e.g., aging vehicle fleet and insufficient housing
- Lack of strong financial reserves and diverse income sources
- Difficulty recruiting staff who have needed educational credentials and training requirements

OPPORTUNITIES

- New CEO leadership will be appointed during fiscal year
- Full implementation of EHR and other IT improvements to enhance consumer access and staff efficiency – use of enhanced IT will also improve overall organizational effectiveness, efficiency, and data integrity and security.
- State and national interest in integrated healthcare initiatives

CHALLENGES

- Increased competition for state dollars with private sector
- Increased and complex regulatory scrutiny by multiple entities at regional, state, and federal level
- Demographics of service area; i.e., includes culturally and racially diverse consumer base that is largely low-income (services must be sensitive to greater diversity and be geared toward largely third-party payer sources)

MISSION AND VISION

The mission and vision of Middle Flint Behavioral HealthCare were developed approximately 15 years ago as part of strategic planning activities of the agency's governing Board and executive leadership team. Each time a new strategic plan is developed, the Board and staff review and update the mission and values statements to ensure that they are reflected of the agency's purpose. Following are the current mission and vision statements.

MISSION

To provide cost-effective, quality treatment, consultation, education and support services to people with addictive, emotional, behavioral, and/or developmental issues. Individual and family needs will be met through professional, confidential, and therapeutic collaboration.

VISION

To create an organization that is recognized by our community as a quality investment, dedicated to making a difference in the lives of individuals and families within our community, values employees, and is well managed and solvent.

STRATEGIC PRIORITY/GOAL AREAS

Six standing areas of planning focus have been adopted by the Board of the organization over the course of several strategic planning cycles. These areas include: Board and leadership development, consumer services and focus, financial

management, organizational management and development, human resources development, and community outreach.

In each of these planning areas, long-term goals are established for each strategic planning cycle. These goals address long-range improvements and address program improvements in one or more of the three following areas:

- Increased efficiencies
- Improved effectiveness
- Service accessibility

Long-term goals are established in the context of the agency's environmental scan, its six goal focus areas, and progress, or lack thereof, on previously established goals.

In addition to the overarching strategic plan, each year the agency develops an operational plan that delineates short-term goals or objectives, proposed strategies to achieve these goals, and targeted outcomes or outputs. (See *Middle Flint Behavioral HealthCare FY 2012 Operational Plan*.)

Finally, the service goals reflected in the operational plan are used to establish the template for each individual service unit's annual goals and performance indicators. These unit-level goals and outcomes are incorporated into the agency's annual outcome management plan. Through this planning method, better alignment between strategic goals and unit-level activities is ensured. (See *Middle Flint Behavioral HealthCare Outcome Plan and Evaluation Report, 2011*.)

Following are the long-term goals in each of the agency's priority focus areas:

BOARD AND LEADERSHIP DEVELOPMENT

- Enhance Board knowledge and leadership capabilities. (Effectiveness)
- Achieve and maintain full Board membership. (Efficiency)
- Establish greater continuity in organizational leadership. (Effectiveness & Efficiency)

CONSUMER SERVICES AND FOCUS

All Service Units --

- Fully utilize organizational capacity to serve consumers. (Efficiency)
- Improve integration of consumers in their communities. (Effectiveness)

- Enhance community service options for consumers. (Service Access)

Recommended Disability Focus Areas --

- Mental Health --Local integration of behavioral and primary healthcare services; decreased hospitalizations; increased in-home therapeutic services; decreased "no-show" rates.
- Addictive Diseases – Improved communications with referral sources and law enforcement; increased public awareness regarding addiction and available services; development of recovery center program
- Developmental Disabilities --Improved safety standards for vehicles and facilities; facilitating moves to less restrictive levels of care.

FINANCIAL MANAGEMENT

- Achieve greater financial solvency. (Efficiency)
- Achieve greater revenue diversification. (Efficiency)

ORGANIZATIONAL MANAGEMENT AND DEVELOPMENT

- Enhance information technology proficiencies. (Effectiveness & Efficiency)
- Ensure regulatory and accreditation compliance. (Effectiveness)
- Improve transportation capabilities. (Efficiency)

HUMAN RESOURCES DEVELOPMENT

- Decrease staff turnover and absenteeism.
- Decrease staff absenteeism. (Efficiency)
- Enhance staff development opportunities. (Effectiveness)

COMMUNITY OUTREACH

- Increase community awareness. (Effectiveness)
- Increase involvement in non-mission activities that benefit community and increase agency revenues. (Effectiveness & Efficiency)

SUPPORTING PLANNING DOCUMENTS AND ACTIVITIES

The agency's strategic plan is not developed in a vacuum, and its implementation is dependent upon factors ranging from individual service unit performance to its financial position. The following plans and reports are utilized in the full implementation of the agency's mission-focused activities.

THE ROLE OF THE OPERATIONAL PLAN

The above long-term goals are being utilized in the development of the agency's FY 2012 operational plan. This plan includes specific short-term goals/outcomes, implementation strategies, and outcomes or outputs that are projected to measure successful performance.

The operational plan serves to "operationalize" the broader goals of the strategic plan by developing annual objectives and activities to meet these objectives, as well as a set of performance indicators. The annual review and updating of the operational plan also serves to provide a formal, standardized review of the strategic plan.

Each year the operational plan will be reviewed and a new annual operational plan developed, for a total of three years, after which time a new strategic planning cycle will begin.

THE ROLE OF THE OUTCOME MANAGEMENT PLAN

In addition to the operational plan, unit- and program-specific goals and outcomes are established through the annual outcome management plan. Every service unit develops effectiveness, efficiency, and service access goals, along with performance targets.

Performance data is collected and reviewed on a monthly basis by each unit manager. Mid-fiscal year, each unit or program reviews its level of achievement with each of its goals. Current goals and performance indicators may be maintained, discontinued, or modified, depending upon performance level and the relevance of the particular goal.

A year-end review of all unit/program goals and performance indicators is undertaken through the agency's Quality Council. Based upon year-end performance and the agency's new operational plan, managers will select goals and performance targets for the next fiscal year.

THE ROLE OF STAKEHOLDER SATISFACTION DATA

The following stakeholder data is used in the development and review of the agency's strategic and operational plans:

- Consumer satisfaction data is periodically gathered on both enrolled and recently discharged clients and summarized in a section of the annual outcome report.
- Employee satisfaction information is gathered through periodic surveys of personnel and summarized in an annual Employee Satisfaction Report.
- Community stakeholder satisfaction is determined through periodic surveys of community stakeholders; e.g., referral sources, contractor agencies, etc.

THE ROLE OF FINANCIAL MONITORING REPORTS

The financial position of the agency is specifically addressed in the financial management goal area above. Each year's operational plan sets specific financial targets and the year-end review will determine to what extent they were met. In this way, the financial position of the organization is regularly updated, and new projections are established for each fiscal year. In addition to monitoring of the financial management goals of the strategic and annual operational plans, the agency and Board undertake formal monitoring of the agency's financial position through monthly expense vs. revenue reports and unit-level margin reports. Other financial reports; e.g., cash flow analyses, billings vs. collections, etc., are also periodically created and reviewed. Such monitoring helps ensure that necessary resources are available and appropriately allocated to support the agency's mission and implementation of its strategic and operational plans. (See *FY 2012 Budget Summary*.)

CONCLUSION

The following elements of the strategic plan will remain in effect for three years:

- SWAT analysis
- Mission statement
- Vision statement
- Strategic focus areas

- Long term goals

If significant changes in the environment, finances, or leadership indicate the need to modify the above, the governing Board and executive leadership of the agency will convene to revise the strategic plan, as appropriate.

The following supporting documents and plans will be in effect for one year, and will be updated annually thereafter:

- FY 2012 Operational Plan
- Outcome Plan and Evaluation Report, 2011
- FY 2012 Budget Summary
- Stakeholder Satisfaction Survey Reports -- Consumer, Employee, and Community

These supporting documents are incorporated by reference into the overall strategic plan.

In order to promote wide dissemination and stakeholder feedback, the strategic plan will be posted on the organization's web site. A summary of the plan will also be made available in the agency's Guide to Services and will be available upon request in the administrative offices. Public comment on the plan is welcomed.