Washington County Mental Health

3-Year Strategic Plan

May 2017

Introduction

The following 3-year plan was developed over several months by the leadership of WCMHS with input from staff and stakeholders. The goals are organized into three categories: Internal, External and Integration goals. Efforts towards attaining these goals position WCMHS as an active participant in the provision of health services and its transformation in Central Vermont. Information Technology, staff training and support, financial diversification, and community education and collaboration are central themes to this strategic plan. The subsequent objectives are creative, innovative, and promote WCMHS as a leader in the provision and coordination of services for individuals with mental health disorders, substance use disorders, and developmental disabilities.

Materials Reviewed

A variety of sources were used to inform this plan, including information from prior strategic plans, leadership meetings, and a leadership survey; Figure 1. The information for the final strategic plan draws heavily upon the final leadership meeting that occurred on May 19, 2017, when leaders used information from the survey to construct the final plan.

> Figure 1: Materials Used to Inform the 2017 Strategic Plan
>
> * 2014 Strategic Plan
> * Power point and notes from the 2/17/17 manager's retreat
> * 2017 Board Staff feedback
> * Prep meeting with Mary Moulton and Susan Loynd
> * Pre-meeting Leadership Survey – May 2017
> * Leadership meeting – 5/19/17

Results

I. <u>Pre-meeting Leadership Survey</u>. In preparation for the final Strategic Planning meeting that occurred on May 19, 2017, Senior Leaders were provided with a survey (available in an accompanying file) asking them to indicate what would make the day successful and difficult, and what they hoped to get from the day; Figure 2. The leaders also used this survey to rank ideas generated at prior strategic planning sessions that pertained to the Internal, External, and Integrated categories and then provide a S.W.O.T. analysis of their top ideas. Results of this survey were complied by category and presented to the leaders at the retreat to promote discussion. Figure 3 lists the priorities by category.

Figure 2: Leadership Feedback about Expectations for the May 19th Meeting

What would make the day successful for you?
- Coming away with a clear plan
- A clear agenda
- Fast-paced, moving discussion that gets to an outcome
- Contributing to the discussion and future direction of goals
- Learning from those who are more experienced
- Team building
- Time to discuss, get the conversation going, give time to expand, but maintain focus and stay on task
- Time to brainstorm and be creative

What would make the day difficult for you?
- All talking and no achievable outcomes
- Discussion that isn't moving in a direction
- Goals that are too lofty
- Team building exercises
- Long sessions with too many "pie in the sky" discussions
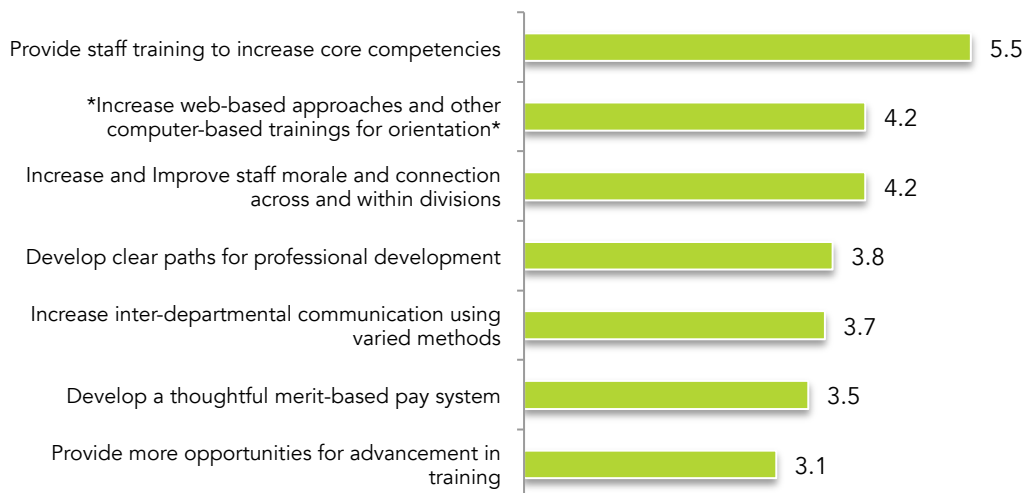- No time to stretch and move around or grab snacks

At the end of the day, we want:
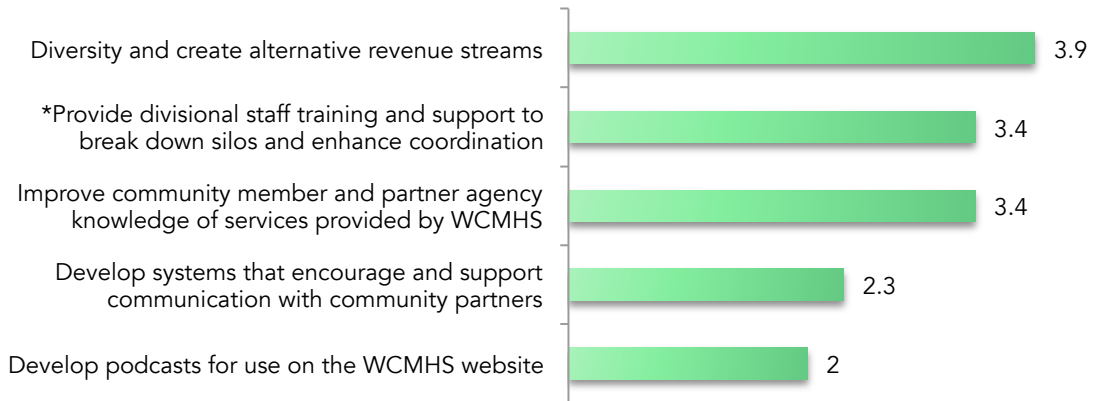- A concrete project plan with roles, responsibilities, timelines, and resource allocation

Figure 3: Priorities by for Internal, External, and Integrated Categories From Leadership Survey
Note: An asterisk indicates that the priority falls across categories.

INTERNAL

Priority	Value
Provide staff training to increase core competencies	5.5
Increase web-based approaches and other computer-based trainings for orientation	4.2
Increase and Improve staff morale and connection across and within divisions	4.2
Develop clear paths for professional development	3.8
Increase inter-departmental communication using varied methods	3.7
Develop a thoughtful merit-based pay system	3.5
Provide more opportunities for advancement in training	3.1

EXTERNAL

Diversity and create alternative revenue streams — 3.9

*Provide divisional staff training and support to break down silos and enhance coordination — 3.4

Improve community member and partner agency knowledge of services provided by WCMHS — 3.4

Develop systems that encourage and support communication with community partners — 2.3

Develop podcasts for use on the WCMHS website — 2

INTEGRATED

Resuscitate the intranet and implement in a functional way — 7

Provide cross-division support and learning opportunities for staff who have similar roles — 6.4

Expand integration beyond the medical world to include integration with other "health" providers — 5.4

Develop strategies to support screener situations in ED — 4.8

*Expand the range of training opportunities, including access to a library * — 4.7

Create/expand collaborative community partnerships — 4.3

Increase partnerships with businesses — 4.2

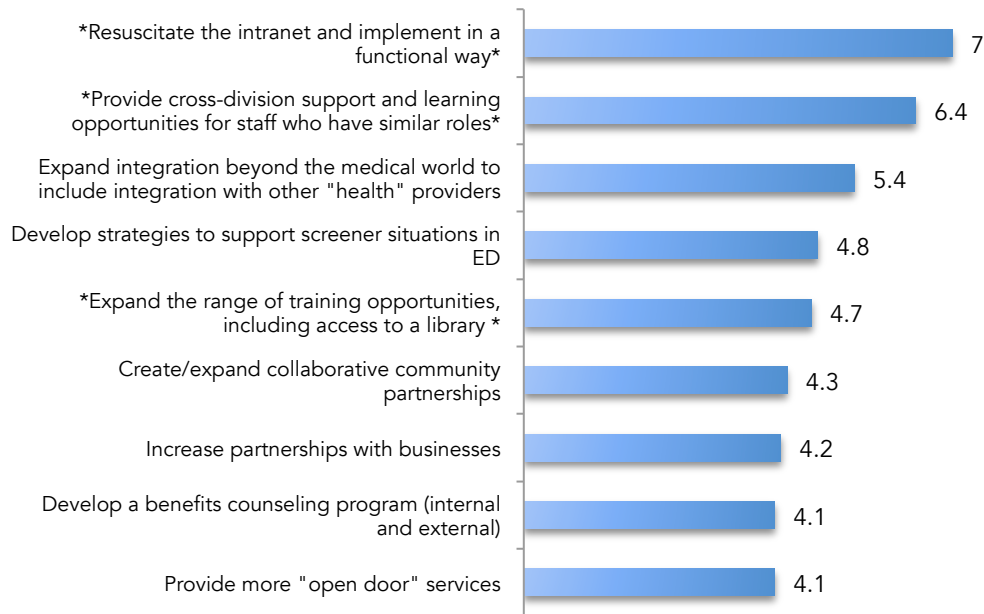Develop a benefits counseling program (internal and external) — 4.1

Provide more "open door" services — 4.1

II. <u>May 19, 2017 Meeting.</u> Twenty agency leaders met to discuss the definition of the Internal, External, and Integrated categories, and the subsequent priorities identified in Figure 3 with the goal of creating a final skeletal 3-year strategic plan.

a. <u>Common Definition of Categories:</u> Before we could prioritize the goals within each category, the group needed to clearly define the categories. Figure 4 provides a list of the common language.

Figure 4: Strategic Plan Categories – Common Language

Definition – INTERNAL

- In house
- Staff training, morale, etc.
- Across programs
- Consumers
- Services
- Working environment and buildings
- IT – information exchange
    o   Improving clinical practice
    o   Improving efficiencies
    o   Enhancing work environment – make job easier
    o   Improving clinical practice
- Silo busting (internally)
- Training/education of staff, consumers, and clients

Definition - EXTERNAL

- Community Relationships
- Revenue/Resources
- State partners
    o   Expectations
- Education/Public Relations
- Information Exchange – IT
    o   Information and data

Definition – INTEGRATED

- Develop collaborative partnerships
- Sharing information
- Shared treatment plans
    o   Provider system has shared responsibility
    o   Looking holistically and at wellness
    o   Addressing Triple Aim
- MOU's – contractual arrangements, formal arrangements on the business end
- Silo busting with external partners

b. <u>Category Goals</u>. The group discussed each category and the priorities presented from the survey results. Through this process, the group combined redundant goals and clarified the meaning of each goal. Figure 5 lists the final categories and goals.

Figure 5: Strategic Plan Goals

INTERNAL – FINAL GOALS

1. Improve ability to provide high quality and consistent clinical, community support, and administrative services
    o Be aware of and train on core competencies to ensure consistency and high quality across service that includes plan to evaluate effectiveness
    o Cross silos when possible
    o Target similar roles regardless of program or division
2. Assess current state of technology and its use at WCMHS to help:
    o Utilize web-based technologies including online, computer-based trainings for orientation
    o Build technology awareness and use
    o Analyze and build out system to support the unified EMR
    o Build implementation plan
3. Increase and improve staff morale and connection across and within divisions

EXTERNAL – FINAL GOALS

1. Diversify and create alternative revenue streams
2. Increase community member and partner agency knowledge of services provided by WCMHS through public relations and community education activities
3. Develop systems that encourage and support communication with community providers

INTEGRATED – FINAL GOALS

1. Expand integration beyond medical world to include integration with other service providers
2. Create and expand collaborative community partnerships that build upon integrated systems to promote access to appropriate levels of care
3. Define and assess current state, and improve upon interoperability with external systems
    o First - People
    o Second - Process
    o Third – Technology

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c. <u>Objectives.</u> As a final exercise, the group brainstormed specific objectives for each goal listed in Figure 5. The group then ranked objectives and discussed which would be included in the final Strategic Plan. A complete list of all the brainstormed

objectives can be found in the transcribed chart paper found in the document titled: WCMHS 5.19.17 Chart Paper Notes.doc. The final list of the strategic plan goals and objectives are listed in Appendix A.

d. <u>Developing next steps.</u> As noted in Appendix A, the group developed an ambitious work plan for this Strategic Plan. Since the group has 3 years to accomplish the plan, they chose to prioritize the following goals for immediate work:

- INTERNAL Goal #2 - Assess current state of technology and its use at WCMHS to help:
    o   Utilize web-based technologies including online, computer-based trainings for orientation
    o   Build technology awareness and use
    o   Analyze system and build out system to support the unified EMR
    o   Build implementation plan
- INTERNAL #3 - Increase and improve staff morale and connection across and within divisions
- EXTERNAL #1 - Diversify and create alternative revenue streams

Moving Forward

The last agenda item of the day was to discuss ways to insure success with implementing and following through with the strategic plan. The group generated a list shown in Figure 6. It is clear that the group has generated a very ambitious plan that even a well-resourced agency would have difficulty implementing all at once. The group made an important first step by prioritizing three goals for immediate work. The strategic plan, as written, still lists all goals as beginning at the same time. Some goals require further discussion by an assigned group to further develop the objectives. Some goals also need further discussion about resources and other partners to involve in the work. Given these considerations, the following recommendations are offered:

Figure 6: How to Keep Moving Forward with the Plan

- Look at it regularly
- Pick one thing and see it through
- Have a leader of a subgroup holding the group accountable
- Test for readiness to determine viability – include this on the excel monitoring sheet
- Keep resources available ($, workforce, etc.)
- Senior management buy in
- Community feedback supports goal
- Include consumers – show them a draft
- Develop a realistic timeline – review list at senior manager and

1. <u>Review the plan to revise timelines.</u> The group decided that they would review the strategic plan at the next Senior Manager's meeting to determine appropriate timelines and assignment of roles.
2. <u>Assign workgroups and specify tasks.</u> Many goals require a leader and a work group to do the work. Once this group is identified, the group can meet to further develop the specific tasks to meet the overarching goal.
3. <u>Regular review of plan.</u> Regular review of the plan will help the group maintain momentum. The Strategic Plan Progress Monitor, an Excel document accompanying this plan, is a tool for use at leadership meetings and subgroups to monitor progress on the activities delineated within the plan.
4. <u>Hold yourselves accountable.</u> Scheduling quarterly meetings with the expressed purpose of reviewing the plan using this tool will also help to maintain momentum towards plan completion. In addition, continuing with your practice of discussing strategic plan progress with your board, advisory groups, and other stakeholders will support momentum towards achieving the goals identified in your plan.

Things to Remember

Finally, the group identified several items for future consideration that may fall outside the scope of the strategic plan. These include:

*   Developing a community partner survey and conducting phone interviews
*   Include in internal core competencies – program development and advocacy with community organizations that address issues of cultural diversity
*   Enhance working environment/buildings
*   Discuss co-location – having staff from different departments and/or divisions working under the same roof

Appendix A: Final Strategic Plan Goals, Objectives, and Activities

Note: The Excel version of this table includes other columns to help with project management

Actions	Start Date	End Date	Assigned
Internal #1 - 1. Improve ability to provide high quality and consistent clinical, community support, and administrative services			
Convene committee	10/1/17	10/30/17	TBD
Develop agency-wide core competencies by role	7/1/17	6/30/18	Training Committee
Develop inventory/assessment of current trainings offered by agency	7/1/17	3/31/18	Training Committee
Complete a gap analysis of needed trainings	7/1/17	3/31/18	Training Committee
Develop training infrastructure to support core competencies	1/1/18	3/31/19	Training Committee
Build trainings for online and in person format	1/1/18	3/31/19	Training Committee

Internal #2 - Assess current state of technology and its use at WCMHS to help develop web-based technology, technology awareness, and support of unified electronic health record			
Convene committee and identify chairperson	6/1/18	3/1/18	CIO
Develop a workable and updated intranet	7/1/17	10/1/18	CIO and committee
House trainings on the intranet		3/31/19	CIO and committee
Develop a plan for building technology awareness and use	10/31/18		CIO and committee
Assess how to leverage our technology to address specific organizational needs	Ongoing	3/31/18	CIO and committee
Implement plan for the unified electronic health record – new system	Ongoing	3/1/20	CIO and committee
Internal #3 - Increase and improve staff morale and connection across and within divisions			
Convene committee and identify chairperson	7/1/17	1/1/18	Lisa & Karen committee
Identify, Develop and write up leadership tenets and principles	7/1/17	12/31/17	committee
Develop a plan to convey information to leadership teams and supervisors	1/1/18	7/1/18	committee
Implement plan	8/1/18	12/31/19	committee
External #1 - Diversify and create alternative revenue streams			

			Director of Development and committee
Convene committee and identify chairperson	7/1/2017	7/30/2017	
Develop donor list	7/1/17	7/31/20	committee
Identify needs per program	3/1/17	3/1/18	committee
Identify grant possibilities	7/1/17	11/1/17	committee
Discuss expanded service coverage of private insurers with emphasis on cost effectiveness of community services - Internal		10/31/17	Snr Mgrs
Relationship building with sponsors and donors to maintain donor list	1/1/18	7/31/20	committee

			Director Development committee
Estate giving - cultivate relationship with large donors	1/1/18	5/1/19	
Offering specialty consultations (base on in-house expertise)	1/31/18	6/30/20	committee
External #2 - Increase community member and partner agency knowledge of services provided by WCMHS through public relation and community education activities			
Convene committee and identify chairperson	10/1/17	10/31/17	TBD
Inventory current community education activities	10/1/17	10/31/20	TBD
Survey community partners and/or public via website to identify interests (use social media)	7/1/17	6/30/18	TBD
Outreach to communities to present forums	7/1/17	6/30/20	TBD
Develop ongoing series from community interest survey conducted in previous year	7/1/2018	6/30/2019	TBD
Examine development of web-based trainings, podcasts, and links on website	7/1/2019	6/30/2020	TBD
Expansion of wellness offerings	7/1/2019	6/30/2020	TBD
Sell trainings externally	1/1/18	12/31/18	Training Committee
External #3 - Develop systems that encourage and support communication with community providers			
Convene committee and identify chairperson	9/1/2017	9/30/2017	TBD

Integrated #1 - Expand integration beyond medical world to include integration with other service providers			
Convene committee and identify chairperson	10/1/2017	12/31/17	TBD
Inventory of current contracts	10/1/17	6/30/20	TBD
Explore new potential billable services (e.g., tele-health)	10/1/17	6/30/18	TBD
Consult in best practices with other professionals outside of our system (e.g., school personnel, nursing home staff, day cares)	10/1/17	6/30/19	TBD
Collaborate with teaching institutions	10/1/17	6/30/20	Susan
Develop models to market statewide	10/1/18	6/30/20	TBD
Continued embedding across systems (e.g., social worker with law enforcement, case manager in pediatrics, psychiatry/therapist in primary care)	10/1/18	6/30/20	TBD
Integrated #2 - Create and expand community partnerships that build upon integrated systems and promote access to appropriate levels of care			
Convene committee and identify chairperson	7/1/17	9/30/17	TBD
Explore urgent care space at CVMC	7/1/17	9/30/17	TBD
Study hours of operation and models to use	7/1/17	9/30/17	TBD

Assess access needed (e.g., days vs. nights, 24/7?)	7/1/17	9/30/17	TBD
Explore coding and billing	7/1/17	9/30/17	TBD
Improve urgent care by enhancing resources of psychiatric staff services in urgent care and the ED	7/1/17	1/30/18	TBD
Integrated #3 - Define and assess current state of information and technology at WCMHS, and improve upon interoperability with external systems			
Convene committee and identify chairperson	7/1/17	7/1/17	TBD
Demonstrations	7/1/17	7/30/17	TBD
Best and Final Offer	7/1/17	8/30/17	TBD
Continue to forget tri-level governance (develop project competencies within group)	7/1/17	7/30/17	TBD
Change management by governance group	7/1/17	7/30/17	TBD
Site visits	7/1/17	9/30/17	TBD
Contract negotiations	7/1/17	11/30/17	TBD
Best practice process development (LEAN analysis)	7/1/17	1/30/18	TBD
Converged BPPD - Statewide	7/1/17	5/30/18	TBD
Data integration and sharing	7/1/17	1/30/20	TBD