Washington County Mental Health

Strategic Plan

June 2022 – June 2024

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Introduction

The following 2-year plan was developed through a collaborative process spanning several months to promote input from staff and community partners. The creators of this plan decided to shorten its duration given the changing community climate and needs. While previous goals have been organized by internal, external, and integrated categories, this plan marks a departure from this organization to highlight goals that impact all 3 areas. The group chose to emphasize developing and supporting healthy communication patterns that include in-person and technology-supported approaches, the expansion of technology to include increased application of existing technological systems, and promotion of WCMHS as a leader and resource in the community in the provision of community-based services and supports for persons living with mental health disorders, substance use disorders, and developmental disabilities. What was also greatly emphasized through this process was the requirement that the plan be attainable and manageable given the significant pressures posed by limited and shifting resources. All participants in this process were very involved and dedicated to the process. The following brief document provides a summary of the process and the final plan.

Materials Reviewed

A variety of sources were used to inform this plan, including information from the prior strategic plan, leadership pre-meetings, a community stakeholder Survey, and a staff management survey; Figure 1. The information for the final strategic plan draws heavily upon the final leadership meeting that occurred on June 8, 2022, when leaders used information from the surveys and information that emerged from a facilitated discussion to construct the final plan. The final plan was reviewed at a Senior Manager's meeting held on June 24, 2022, when final edits to the objectives and timeline were completed. The final strategic plan is in Appendix A.

Figure 1: Materials Used to Inform the 2022 Strategic Plan

- 2017 Strategic Plan with updated goals
- Prep meetings with the CEO and COO
- 2022 Staff Pre-retreat Survey
- 2022 Community Stakeholder feedback
- Strategic planning retreat held on 6/8/22
- Senior manager meeting 6/24/22

Results – Staff Pre-Retreat Surveys

All program leaders at WCMHS were asked to complete a staff survey on behalf of their program, Appendix B. Questions in the survey addressed priorities for strategies planning based upon progress from the prior plan, as well as feedback to inform the process for the retreat. Ten staff completed the staff pre-retreat survey and offered helpful feedback about priorities for the day. Survey results are available in the power point slide deck available in Appendix G. The overwhelming feedback from staff was that they felt stretched and at capacity with new initiatives. As a result, they emphasized the need for a plan that was brief (no more than 3 goals), attainable with actionable steps, and that overlap with other co-occurring initiatives. As discussion progressed, it became clear that a different organization of goals that were more overarching and not limited to the prior plan categories (internal, external, and integrated) would be more effective.

Finally, staff provided helpful feedback about what would be a productive and unproductive planning day. These suggestions were followed throughout the planning day, including activities that allowed staff to debrief and share about their own professional and personal experiences with the pandemic, how they coped and what they learned.

The final plan addresses their concerns as evidenced by a final plan with 3 goals with clear objectives that focus on improving communication within the agency, increasing their ability to work with community providers to respond to the evolving community needs., and finding ways to use technology to improve these processes. All notes from discussions and brainstorms can be found in Appendices D – F.

Results – Community Stakeholder Survey

The leadership of WCMHS was interested in feedback from community stakeholders but did not feel we had time for more involved interviews. To this end, another survey was developed and sent to community partners electronically, Appendix C. To this end, 8 community partners provided feedback about their experiences with WCMHS.

Respondents were overwhelmingly positive about their experiences with WCMHS staff and services. They endorsed having a limited knowledge of WCMHS services and acknowledge the significant impact the pandemic and preexisting staff shortages have had upon the organization's ability to provide timely services given wait lists.

Respondents also endorsed the WCMHS is an innovative leader in the community and hoped that WCMHS can continue this culture as the community moves forward to respond and develop to the needs of a pandemic affected world. Partners also communicated a desire to have continued and improved methods of communication with WCMHS. S

Staff considered this feedback strongly while developing their strategic plan goals, as evidenced by identifying ways to improving community knowledge of WCMHS services, improving overall communication approaches, and implementing technology solutions to improve interoperability between electronic record keeping systems. The power point and discussions about these results can be found in Appendices D – G.

Note: 3 organizations asked for follow up discussions. This information was sent to the CEO electronically on June 2, 2022.

Results – 6/8/22 Retreat

Management staff gathered for a full day on 6/8/22 to review the survey results and discuss potential goals. Representatives were available from all divisions, as was a representative from the WCMHS board. All were engaged, thoughtful and focused on the tasks of the day, despite pressing demands. We intermingled activities to share and develop the sense of "team" while also working towards the final strategic plan goals.

While the final goals addressed many concerns and ideas raised by staff, there were many items that were not included in the plan that are worthy of review as the current strategic plan is implemented. One such item was a brief discussion about what the group termed, "The Question" which is a highly difficult question addressing the realities of providing services in an evolving climate with continually shrinking resources. There is great concern that this question will lead to a quick decision to eliminate a program area. The group was encouraged to explore what is required by Federal and State administrative rules, but to also consider what is required for WCMHS. To this end, the team decided to list their questions and concerns so that they could have a facilitated conversation at a future date.

All materials reviewed and generated from this day are found in Appendices D – G.

Strategic Plan Goals and Objectives

Below is a list of the 3 major goals and objectives. A complete list is in Appendix A and a "Working" excel document designed to help keep the program active has been sent to WCMHS leadership. All due dates were assigned by Senior Managers on June 24, 2022:

Goal #1 – Improve Connection, Communication and Collaboration across Divisions and with Community Partners to Support Community-based Quality Services and Supports

> *Objective 1: Provide a management retreat to explore issues of communication in WCMHS*
>
> *Objective 2: Convene a study group to learn about how to maximize inter-, intra, and external communications to WCMHS*

Goal #2 – Improve Technology Literacy to Promote Connection, Communication, and Better Services and Supports

> *Objective 1: All WCMHS staff are fully informed of expectations for use of technology across their work at WCMHS*
>
> *Objective 2: Technology at WCMHS is fully interoperable and compatible*

Goal #3: Educate Community and Health Care Providers about WCMHS to Promote Opportunities for Integration and Collaboration to Address Evolving Community Needs

> *Objective 1: WCMHS will provide trainings and education to the community to address community needs*
>
> *Objective 2: The community will be more knowledgeable about WCMHS and the services it provides*
>
> *Objective 3: Fully implement IT solutions for health care integration*

Moving Forward

The team agreed to the following steps to keep the strategic plan a working document:

1. Review the plan to revise timelines. The group decided that they would review the strategic plan quarterly in a facilitated discussion led by the CEO and AOC. The excel form of the strategic plan can be updated at that time so that the team can see their progress on the plan.
2. Assign workgroups and specify tasks. It is advised that the work groups are assigned quickly and communicate back to the CEO and AOC regularly regarding their progress.
3. Hold yourselves accountable. Talk with each other about the plan, what is working, and what appears to be stuck. Brainstorm how to move the plan along and update the plan as needed.
4. Model what you want others to do. As leaders, your staff will watch whether you implement efforts targeted by the plan. Lead by example, ask for feedback, and encourage that growth in others.
5. Hold space for the plan to move forward while holding ongoing crises. The "home visit" analogy was offered to illustrate the importance of maintaining focus on goals while managing the constant changes around you. Your goals were identified because you believe they will help you to manage the evolving climate better.
6. Communicate your plan to the broader agency. Involving staff in the plan and goals as soon as possible will also help create momentum and dedication.

Thank you for participating in this facilitated process and please reach out if more support and/or clarification is needed.

Resources

WCMHS has identified the need to establish improved communication and connection across the agency and with community partners. Communication in the post-acute pandemic phase has been challenging and the group may find some of the resources found in Appendix H helpful for beginning a discussion group.

Appendix A: Final Strategic Plan Goals, Objectives, and Activities
Note: The Excel version of this table includes other columns to help with project management

TASK	Goals/Objectives	Start	End	Assigned
Goal #1 – Improve Connection, Communication and Collaboration across Divisions and with Community Partners to Support Community-based Quality Services and Supports		**7/31/22**	**6/24/24**	
	Objective 1: Provide a management retreat to explore issues of communication in WCMHS			CEO and AOC
1	Management retreat: Plan manager retreat to discuss issue, identify gaps, training needs, technology needs, and beyond	7/31/22	10/1/22	
2	Management retreat: Host program manager retreat to explore issues of communication in the agency	10/31/22	11/1/22	
3	Management retreat: Develop a summary of the retreat to act as a guidance document for Objective 2	11/1/22	12/31/22	
	Objective 2: Convene a study group to learn about how to maximize inter-, intra-, and external communications to WCMHS			Director of Quality Improvement and Compliance & CEO

TASK	Goals/Objectives	Start	End	Assigned
1	Communication Team: Convene a diverse committee to review research regarding basic tenets of effective communication in organizations in an evolving pandemic environment	1/31/23	3/31/23	Cross-function committee identified by DQI and CEO
2	Communication Team: Develop assessment of staff to learn about their experiences with communication with each other, managers, and community partners based upon feedback from program manager retreat	3/23/23	6/2/23	
3	Communication Team: Review assessment results and develop an action plan (e.g., technology, training, supports, and beyond) to address gaps and needs	6/30/23	9/30/23	
4	Communication Team: Develop a guiding document for communication to include a dissemination plan (Note: should apply to inter, intra and external communications to WCMHS)	9/31/23	12/31/23	
5	Communication Team: Committee begins using this guide to work on retention and staffing	1/1/23	6/30/24	Committee reconfigures to address issue
6	Communication Team: Committee works with guide to address Goal #2	7/1/23	6/30/24	Committee reconfigures to address issue
7	Communication Team: All staff use this work to continue to learn and promote equity, diversity, and inclusion of all	7/1/22	ongoing	

TASK	Goals/Objectives	Start	End	Assigned
Goal #2 – Improve Technology Literacy to Promote Connection, Communication, and Better Services and Supports		**7/1/22**	**6/30/24**	
	Objective 1: *All WCMHS staff are fully informed of expectations for use of technology across their work at WCMHS*			**Training Coordinator & Director of IT**
1	Informed consent with technology: Develop and complete an assessment of staff need with regards to use of hardware, software, training, application, and analytics	9/1/22	12/31/22	
2	Informed consent with technology: Create a list of universal WCMHS technology expectations	1/1/23	3/31/23	
3	Informed consent with technology: Create a list of role-based technology expectations	1/1/23	3/31/23	
4	Informed consent with technology: Create training modules in Relias for universal expectations	4/1/23	6/30/23	
5	Informed consent with technology: Create training modules in Relias for role-based technology expectations	4/1/23	6/30/23	
	Objective 2: Technology at WCMHS is fully interoperable and compatible			**CFO and HR Director**
1	Integrate software platforms: RFP	6/14/22	7/1/22	
2	integrate software platforms: Vendor responses	7/1/22	7/15/22	
3	Integrate software platforms: Demos	7/15/22	8/4/22	
4	Integrate software platforms: Selection	8/31/22	9/14/22	

TASK	Goals/Objectives	Start	End	Assigned
5	Integrate software platforms: Contract negotiations	9/15/22	11/30/22	
6	Integrate software platforms: Implementation, testing, and validation	12/1/22	12/31/22	
7	Integrate software platforms: Training developed	12/1/22	6/30/24	
8	Integrated software platforms: Go live	1/1/23	6/30/24	
Goal #3: Educate Community and Health Care Providers about WCMHS to Promote Opportunities for Integration and Collaboration to Address Evolving Community Needs		**6/30/22**	**6/30/24**	
	Objective 1: WCMHS will provide trainings and education to the community to address community needs			Training Coordinator and committee - Coordinator PR Director, CEO
1	Survey partners about their needs: Identify partners	6/30/22	7/1/22	
2	Survey partners about their needs: Develop and implement a needs assessment	7/1/22	8/1/22	
3	From survey, develop trainings to address needs provided by agency experts	9/1/22	12/31/22	
4	From survey, create an education series building upon identified needs with agency experts and in collaboration with community experts	1/1/23	3/31/23	

TASK	Goals/Objectives	Start	End	Assigned
3	Develop a quarterly community partners newsletter with a pre-determined publishing cycle in conjunction with THRIVE	1/1/23	ongoing	PR Director
5	Provide a virtual tour of WCMHS services for community partners (record and have available in Relias and to community partners) for internal and external partners	6/30/23	6/30/24	
	Objective 2: The community will be more knowledgeable about WCMHS and the services it provides			Adult and Children's Redesign Meeting, Chaired - CEO, CYFS Director
1	WCMHS will work with community partners to develop a "road map" of care pathways, including referrals internally and externally, lengths of stay, and beyond	9/1/22	ongoing	
	Objective 3: Fully implement IT solutions for health care integration			IT Director, Jeff, Chris Wiltshire (UEMR Project Manager), Program Manager for Behavioral Health Integration

TASK	Goals/Objectives	Start	End	Assigned
1	Implement Care Connect - Identify appropriate community medical providers	6/31/22	8/30/22	
2	Implement Care Connect - Identify IT person from network	6/31/22	8/30/22	
3	Implement Care Connect - Understand interoperability process	6/31/22	8/30/22	
4	Implement Care Connect - Study workflow integration	9/1/22	12/31/22	
5	Implement Care Connect - Develop an education plan	9/1/22	12/31/22	
6	Implement Care Connect - Implement rolling education plan	1/1/23	6/30/22	

Appendix B: Staff Survey

WCMHS Strategic Plan Prep Survey Spring 2022

Getting ready!

Thank you for taking the time to complete this brief survey to prepare for the upcoming Strategic Planning meeting in June. Please complete this survey by end of business on Tuesday 5/10/22.

Below are goals that your team identified as priorities in 2017 that were not completed. As with the prior strategic plan, the priorities below are arranged by their relation to Internal (e.g., priorities for internal operations for WCMHS), External (e.g., priorities emphasizing activities outside of WCMHS but might influence internal operations), and Integrated (e.g., priorities that emphasis integration with other organizations external to WCMHS) priorities for WCMH.

Please work on this survey with your team and provide ONE answer. Please rank order the remaining tasks and then offer feedback about your top 3 priorities for each area.

Of course, your lives and the landscape of your work has shifted significantly since the completion of the 2017 strategic plan. At the end of this survey, your team will also be given the opportunity to provide ideas for new priorities for each area if your team believes there is a pressing issue that WCMHS should address more immediately.

The results of this survey will be presented in aggregate at our meeting to help us jump into the work. Individual or identifying responses will be not be shared.

Thank you so much for your thoughts and input. If you would like to discuss your responses further, please feel free to contact me at (802) 922-1612, or by email at cath.burns@synchrosaic.com.

Thank you,

Cath Burns

* 1. Please rank your highest to lowest priorities for INTERNAL GOAL #1: Improve ability to provide high quality and consistent clinical, community support, and administrative services

⋮⋮ ▲▼	Develop agency-wide core competencies by role (75% complete)
⋮⋮ ▲▼	Develop inventory/assessment of current training offered by agency (50% complete)
⋮⋮ ▲▼	Complete a gap analysis of needed trainings (0% completed)
⋮⋮ ▲▼	Develop training infrastructure to support core competencies (0% completed)
⋮⋮ ▲▼	Build trainings for on-line and in-person format (75% completed)
⋮⋮ ▲▼	Develop a plan to convey to leadership teams for improvement communications across divisions (0% completed)

2. Please say more about your #1 answer:

Strengths:	
Weaknesses:	
Opportunities:	
Threats:	
Specific suggestions to achieve this goal:	

3. Please say more about your #2 answer:

Strengths:	
Weaknesses:	
Opportunities:	
Threats:	
Specific suggestions to achieve this goal:	

4. Please say more about your #3 answer:

Strengths:	
Weaknesses:	
Opportunities:	
Threats:	
Specific suggestions to achieve this goal:	

5. The activities described in Internal Goal #2 "Assess current state of technology and its use at WCMHS to help develop web-based technology, technology awareness, support of unified electronic health record, and interoperability with external systems" were accomplished. Please describe any priorities your team believe are important that pertain to technology at WCMHS.

6. Please describe any other internal goals your team believes should be a priority, including suggestions for how to achieve this goal.

* 7. Please rank your highest to lowest priorities to EXTERNAL Goal #1: Diversify and create alternative revenue streams

- Build relationships with donors and sponsors via a newsletter and recognition event
- Estate giving - Develop relationship with large donors
- Continue work with "Friends of WCMHS" committee to develop a donor list, identify needs of programs, and explore grant possibilities)
- Continue to work on expanded service coverage of private insurers with emphasis on cost effectiveness of community services

8. Please say more about your #1 answer:

Strengths:	
Weaknesses:	
Opportunities:	
Threats:	
Specific suggestions to achieve this goal:	

9. Please say more about your #2 answer:

Strengths:	
Weaknesses:	
Opportunities:	
Threats:	
Specific suggestions to achieve this goal:	

10. Please describe any other EXTERNAL goals that your team identified pertaining to diversifying funding streams.

* 11. Please rank your highest to lowest priorities to EXTERNAL Goal #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 (0% completed)
- Inventory current community education activities (50% completed)
- Survey community partners and/or public via social media, surveys and other outlets to identify interests (0% completed)
- Perform outreach to communities to present forums (50% completed)
- Develop ongoing series from community interest survey (0% completed)
- Examine development of webbed trainings, podcasts, and links on the website (0% completed)
- Market trainings and speciality consultations externally (0% completed)

12. Please say more about your #1 answer:

Strengths:

Weaknesses:

Opportunities:

Threats:

Specific suggestions to achieve this goal:

13. Please say more about your #2 answer:

Strengths:

Weaknesses:

Opportunities:

Threats:

Specific suggestions to achieve this goal:

14. Please say more about your #3 answer:

Strengths:

Weaknesses:

Opportunities:

Threats:

Specific suggestions to achieve this goal:

15. Please describe any other EXTNERAL goals your team believes should be a priority, including suggestions for how to achieve this goal.

* 16. Please rank your highest to lowest priorities to INTEGRATED goals:

- Continue to collaborate and embed services and programs across systems
- Collaborate with teaching institutions (50% complete)
- Develop models to market statewide (0% complete)
- Explore integrating in primary and urgent care space at CVMC (50% complete)
- Assess access needed for the community (e.g., days, nights, 24/7) across programs

17. Please say more about your #1 answer:

Strengths:

Weaknesses:

Opportunities:

Threats:

Specific suggestions to achieve this goal:

18. Please say more about your #2 answer:

Strengths:

Weaknesses:

Opportunities:

Threats:

Specific suggestions to achieve this goal:

19. Please say more about your #3 answer:

Strengths:	
Weaknesses:	
Opportunities:	
Threats:	
Specific suggestions to achieve this goal:	

20. Please describe any INTEGRATED priorities your team believe should be a priority, including suggestions about how to achieve this goal.

21. Please describe any other priority area that was not listed above identified by your team for your division.

22. Please describe any other priority area that was not listed above identified by your team for all of WCMHS.

WCMHS Strategic Plan Prep Survey Spring 2022

Hopes and expectations for the retreat day?

We realize that taking a day from your work is a significant ask and we want to be sure that we do our bests to make this day worthwhile for you. Your feedback below will help us to structure a day that will make the best use of your time.

23. Please describe your expectations for the day. What do you hope will occur during the meeting to make it successful for you?

WCMHS Strategic Plan Prep Survey Spring 2022

I will know the day was a success if....

25. What will tell you that the day was a success? What do you want to walk away from the meeting with?

26. Please tell us anything else you would like us to consider when planning this day.

Appendix C: Community Stakeholder Survey

WCMHS Community Stakeholder Survey 2022

The senior leadership of WCMHS has contracted with Synchrosaic LLC to compile feedback from community partners to inform their 3 year strategic plan. Your responses will be confidential, unless you indicate at the end of the survey that you would like someone from WCMHS to contact you to discuss your responses. All responses and comments will be aggregated into themes and then shared with WCMHS leadership at an upcoming leadership retreat.

Thank you, in advance, for the time you are taking right now to provide this important and valuable feedback. We would appreciate your completing this survey by May 11, 2022.

* 1. What type of organization do you represent?

- ◯ Physical health care
- ◯ Private business
- ◯ Law enforcement/first responder
- ◯ Community provider - Housing, food security, economic services
- ◯ State Agency
- ◯ Faith based organization
- ◯ Education
- ◯ Banking and/or finance
- ◯ Other (please specify)

2. How long have you been familiar with WCMHS and its leadership

- ◯ 0 - 1 year
- ◯ 1 - 3 years
- ◯ 3 - 5 years
- ◯ 5 - 10 years
- ◯ 10 years or more

3. How much do you interact with leadership and/or staff from WCMHS

- ◯ Not at all
- ◯ A bit (monthly)
- ◯ Occasionally (2 – 3 times per month)
- ◯ Regularly (weekly)
- ◯ Daily

4. How familiar are you with the services provided at WCMHS?

	Not at all familiar	Sort of familiar	Somewhat familiar	Very familiar	Extremely familiar
Emergency screeners	◯	◯	◯	◯	◯
Brief urgent care	◯	◯	◯	◯	◯
Home intervention	◯	◯	◯	◯	◯
Lighthouse	◯	◯	◯	◯	◯
Polaris - Adolescent and Family DBT	◯	◯	◯	◯	◯
Children's grief and loss groups	◯	◯	◯	◯	◯
Children's Counseling services	◯	◯	◯	◯	◯
Early childhood services	◯	◯	◯	◯	◯
Children's Developmental services	◯	◯	◯	◯	◯
School contracted services	◯	◯	◯	◯	◯
Adult mental health community support services	◯	◯	◯	◯	◯
Adult mental health center for counseling and psychological services	◯	◯	◯	◯	◯
Developmental Services - children's services	◯	◯	◯	◯	◯
Developmental services - communication services	◯	◯	◯	◯	◯
Developmental services - communication services	◯	◯	◯	◯	◯
Developmental	◯	◯	◯	◯	◯

services - crisis					
Developmental services - employment services	◯	◯	◯	◯	◯
Developmental services - psychiatric and nursing services	◯	◯	◯	◯	◯
Developmental services - residential services	◯	◯	◯	◯	◯
Developmental services - skill building groups	◯	◯	◯	◯	◯

5. How satisfied are you with the services provided by WCMHS

- ◯ Very satisfied
- ◯ Satisfied
- ◯ Neither satisfied nor dissatisfied
- ◯ Dissatisfied
- ◯ Very dissatisfied

Please tell us more:

6. I would recommend WCMHS for employment.

- ◯ Very likely
- ◯ Likely
- ◯ Neither likely nor unlikely
- ◯ Unlikely
- ◯ Very unlikely

Please tell us more:

7. I would recommend WCMHS to family and friends for services.

- ◯ Very likely
- ◯ Likely
- ◯ Neither likely nor unlikely
- ◯ Unlikely
- ◯ Very unlikely

Please tell us more:

8. What do you value most about WCMHS?

9. In your opinion, what does WCMHS do well?

10. What do you believe WCMHS should improve?

11. What are the biggest challenges being faced by WCMH?

12. What opportunities for innovation to you see for WCMHS?

13. What do you believe should be WCMHS top 3 areas of focus for the next 3 years in order of importance?

Priority 1

Priority 2

Priority 3

14. (Optional) If you would like WCMHS leadership to contact you to discuss your answers, please leave your contact information.

Name	
Company	
Address	
Address 2	
City/Town	
ZIP/Postal Code	
Email Address	
Phone Number	

Appendix D: Notes from A.M. Discussion of Power Point

The following notes were taken to generate ideas for goals, which we parsed out after lunch.

- Move training to operations – no longer a specific strategic plan
- **Focus on recruitment and retention – (note: rolled into communication goal task)**
    - Recruiter starting 6/1 – will reach out to senior team to explore retention needs including
        - An assessment of the process within programs and division
        - Need to do "stay" surveys and "exit" surveys as well as share the results
    - Have a mini-retreat to discuss the topic don't make it a strategic plan goal
    - Roll into the communication goal
    - Benefits of staying
    - Training for staff to manage in this current world
    - How to improve connection and commitment so that people stay
    - Change outlook on training and how it is delivered
- Assessment of needs of staff and community in pandemic affected work
- **EDI work ongoing and embedded into all strategic plan goals**

1. **Improving thoughtful connection, communication, and collaboration across/within divisions, across community partners**
    - Be clear about what success look like:
        - People feel seen and heard
        - People understand how to communicate effectively
        -
    - Assessment of what is needed, best practices, what works in this climate
    - Explore how technology (SharePoint, teams) to promote communication and when it is appropriate to use it
    - Include information about people, roles, and responsibilities
    - Principles of how to do this with tenets to include rules of engagement
        - Process for decision making/problem solving and when to involve senior manager
        - Facilitate sense of belonging to a team that has influence and problem-solving ability
        - When to use which forms of information

2. **Technology literacy to promote connection, communication and better services and supports**
    a. Ask what is getting in the way of employees' use of technology
        i. Hardware issues
        ii. Training issues
        iii. Software issues
        iv. Lack of understanding about the benefits of tech
        v. Analytics

b. Develop interventions (human and otherwise) that addresses these needs and make it "easier" and routine for staff and possibly the people who hire us use it as well
c. Explore innovative approaches for use of technology

3. **Education of community providers and health care entities about the services provided by WCMHS to promote opportunities for integration and collaboration to address community and individual needs**
    a. Co-lead trainings
    b. Active outreach to partners to educate about WCMHS services
    c. Co-located services?
    d. Funding opportunities?
4. Figure out how to have the conversation about how to address the current capacity and projected financial and staffing resource limitations
    a. Overall assessment of needs by division
    b. Discuss how to target services depending upon needs
    c. What can we tap into?
        i. Peers
            1. Housing
            2. Staffing
    d. Discuss what are WCMHS core services as defined by State, Federal and Regional goals
        i. Revisit State statutes about who must be served
    e. Where to send the information/discussion to inform policy
    f. What would WCMHS want the system to look like to be the best MH, SUD, and IDD system it can be

Appendix E: Chart Paper Notes Morning Activities

Morning COVID Debrief Activity

1. *What did you lose because of the pandemic?*

- A sense of what is "normal"
- Friendships
- My father
- The ability to complete usual job tasks
- Communication in person
- Time
- Employees – people to do the important work
- Health
- A colleague to early retirement
- Sense of order in my life
- Dinners out
- Mom's 70th birthday and the ability to celebrate her
- Faither the world/Vermont cares about the treatment of mental illness. If we can respond to COVID as a state, then why not mental health?
- My mother
- A sense of freedom, security, safety, control over what is next, continuity
- Emotional and social connections
- Ability to disconnect from work
- Connection to important people
- Travel and move around independently
- A family member
- Staff, Money
- Freedom to go places

2. *How did you cope?*

- Focused on self-care
- Respect individual needs
- Tried to do "normal" things
- Tried to stay connected with friends, family, WCMHS, ski school
- Love
- Finding joy in all parts of life – home (nature, cooking, family), work (small successes, my amazing team)
- Having each other – knowing there were people to depending on
- Not alone
- Tried to look at what I have versus what I didn't
- Zoom!
- Puzzles
- Work from home
- Not being alone
- More personal time
- Technology
- Patience
- Comfort (boxers, slippers)
- One day at a time
- Slowing down
- Staying connected
- Valuing the night staff
- Knowing that others were experiencing the same helped
- Identifying self-care strategies
- Prioritizing
- Family/Friends
- Connections
- Communication
- Collaboration
- Creative outlets
- Outside activities
- Trying to be grounded
- Mutual aid
- Swimming
- Exercise
- Gaming computer
- Talk to loved ones

- Keeping a positive mindset
- Theater
- My COVID pod
- Friends

3. *What do you want to keep in your life moving forward?*

- Swimming
- Mutual aid
- Love and connection
- Flexibility in time and place
- Laughter
- Appreciation for the little things
- Self-care
- Keeping joy and appreciating the small things
- Team connection
- Planning meetings to keep moving forward
- My job
- My wife
- My family
- My mental and physical health
- Slow down and embrace the process and humanity of the people involved
- Being patient with my team and staff
- Being patient with myself
- Connection
- Activities and pastimes
- Work from home flexibility
- Hybrid work
- Zoom meetings
- Flexible hours for staff
- My awareness of balance
- Trust in our ability to work through uncertainty
- COVID traditions – dinner check ins
- International friends
- Breath!
- Playing
- Flexibility
- Family and friends
- Social connections
- Outdoor activities

Morning Activity: What Others Need to Know about My Division

CDS/CSP – general discussion

- Staffing is the issue - hiring and retaining staff to promote stability
- Alternative housing is critical
- Working on collaboration with State partners
- Need to improve documentation
- Want to develop buy in to technology, documentation, use of materials by all staff
- **Need increased advocacy to decrease administrative demands (stated multiple times)**
- Respect
- Patience
- Kindness
- **Assume good intentions (stated multiple times)**

ACCESS and ES

- How to live in this new world
- How to continue to be nimble
- Communication – need more but in a different way
- General apathy with the state of the union
- Want to move towards collaboration with partners, staff, etc.

CCPS

- Recognition of work – people feel "unseen"
- Move away from the deficit model
- Divisions need to assume "goodness"

Psychiatry

- Need to address unmet needs – particularly with kids
- Want to explore collaboration opportunities with medical community
- Want to develop a long-term strategy

General

- Feel gratitude and pride for the services that are provided (high quality)

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Appendix F: Chart Paper Notes Afternoon Activities

The following Chart Paper notes were used to articulate and build out broad goals for the strategic plan.

Guide for Goals

1. Keep it simple
2. Choose goals that benefit the WHOLE agency
3. Make the plan small and attainable
4. Promote connections across divisions
5. Look at untapped resources
6. Consider overlap with CCBHC, Payment Reform, COE and other state initiatives

SMART Goals

- Specific
- Measurable
- Achievable
- Realistic
- Time-bound

Goal #1 – Improve thoughtful connection, communication and collaboration across/within divisions and partners

Looks like:

- People report feeling seen and heard
- People understand how to communicate effectively

Need:

- Assessment of what is needed, best practices, etc.
- Technology and guidelines about when to use it
- Information about people and their roles, place in line for communication
- Clear tenets:
    - Decision making
    - Hierarchy
    - When to use types of communication (how to turn this into an objective?)
    - Assume good intentions

Stars	Dots	Objective and points
2	3	Consolidate our real estate – be under the same roof
2	5	Utilize SharePoint for:

		• Committees • Collaboration • Need protocols for when to use what technology for what communication
*5	5	Creating of principles of communication for optimum outcomes 1for clients and staff
	1	Use Avatar Nx Treatment Team Section for communication – to include clinicians in communication
	1	Establishing relationship with so many people – both internal and external with State
**3	5	Create shared projects – shared responsibilities (instead of parallel) across divisions • Work on how to translate this to "middle management
2	1	Increase non-categorical case management
1	1	Identify venues for face-to -face personal communication between key community partners

Communication objective – ideas for work:

1. Individuals across division to discuss basic tenets of communication (by 2/23) – involve middle managers, use clinical to start? combine redesign groups?
- When to phone versus use email
- Expected response to a phone call – etc.
- Respectful communication – etc.

2. Program manager retreat with this as a primary agenda item – September 2022
- How to get buy in
- Maintain momentum
- How do staff feel connected to the work and to each other & to clients and mission?
3. Find a shared project to apply principles to:
- Staff retention project (January 23)
- Documentation buy-in
- Effective use of technology
- Equity, diversity, and inclusion work

Goal #2 – Improve Technology Literacy to Promote Connection, Communication, and Better Services and Supports

→ Ask: What is getting in the way of employee use of technology
- Hardware

- Software
- Training issues
- Analytics
- Limited understanding of the benefits of each

→ Develop interventions that make it "easier" and routine for staff to use technology

→ Look for innovations

Stars	Dots	Objective and points
	4	Transition to SharePoint and Teams
2	3	Decision tree about what form of communication to use when
	5	Obtain permission to build "Teams"
1	3	Assessing roles to achieve enhanced supports for data extraction in documentation – can current monitors transition to these duties?
1	3	Avatar NX Dashboard to enhance information on team members and communicate through the system
*5	2	Integrated software platforms: P/R, ATS, HRIS, G/L, Position Management, Exp. Acct
2	2	How to build capacity within staff schedules to access the technology – hoteling throughout the county
**3	4	Informed consent around technology

1. Informed consent with technology
    a. Create a list of universal WCMNS technology expectations 9/1
    b. Create a list of role-based technology expectations– 9/1
    c. Create training modules (Relias)
        i. Universal (10/31/22)
        ii. Role-based (12/31/22)

Who? Training coordinator/HR/IT?

2. Integrate software platforms
    a. RFP – 6/14
    b. Vendor responses – 7/1
    c. Demos – 7/15 – 8/4
    d. Selection – 8/31
    e. Contract negotiation – 9/15 – 11/30
    f. Implementation/testing – 12/31/22
    g. Validation – 1/1/23
    h. Training – 1/1/23
    i. Go Live – 1/1/23
    j. Documentation – 1/1/23

Goal #3: Educate Community and Health Care Providers about WCMHS to Promote Opportunities for Integration and Collaboration to Address Evolving Community Needs

Looks like:

- Co-led trainings
- Active outreach (1 star)
- Co-located services (1 dot)
- Funding opportunities
- Community forums
- Improved referral system (1 dot)
- Clarity of pathways to care (2 dots, 1 star)
- Radio program

Stars	Dots	Objective and points
		Identify categories of partners
3	2	Understand /clarify roles of community partners
1	3	Educating about role (e.g., Statutory) and provide cross-training, what do they do?
*2	3	Survey partners about their needs and offer trainings/education, information and resources
**2	4	Demonstrate community leadership through community forums, trainings, conversations with community partners
		Grant writing with partners
		Co-located services (e.g., Good Sam "hub")
**5	4	Health pointe (client portal) and Care Connect (interface with Epic)

1. Survey partners about their needs – offer trainings/education/information/resources (e.g., CVHHH, etc.)
    a. Identify partners – resource list and priorities (Q!23)
    b. Develop and implement a needs assessment
        i. Design trainings
        ii. Education series
        iii. Outlining resources
        iv. Who – face to face meetings/in-services?
        v. Community partners newsletter

    Who (Cara, John) – Begin Q323?

2. Demonstrate community leadership through community forums, trainings, conversations with community partners (e.g., schools, select boards, etc.)
    a. Needs assessment – Q123 – planning
    b. Who to bring information out – identify our experts – begin process of outreach Q323?
3. Care connect (medical record system communication)
    a. Understand interoperability process
    b. Workflow integration
    c. Education and training
    d. Identify IT person from network
    e. Identify which providers (Plainfield Health Center, UVM, etc.)

The Question:

The group discussed THE QUESTION and developed this list of questions, considerations to address the resource limitation that looms large for the agency. The group agreed that this is an important discussion that should be facilitated in the future. These few notes are for future reference.

The Question How to address current capacity and project financial and staffing resource limitations?

- Assessment by division
- What can you tap into that could help?
    - Peers?
- What are your core services per State, Federal, WCMHS, Community Mandates
- What does WCMHS want to look like?
- Redesign groups (Adult and Children_ = s[end one day to address assessment areas

Appendix G: Power Point Presentation

WCMHS Strategic Planning Retreat 6/22/22

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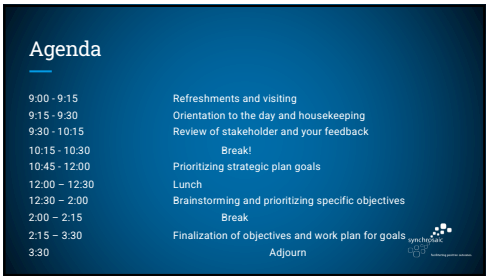

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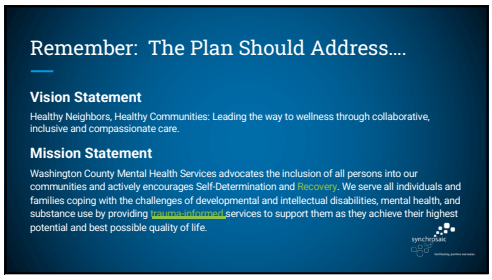

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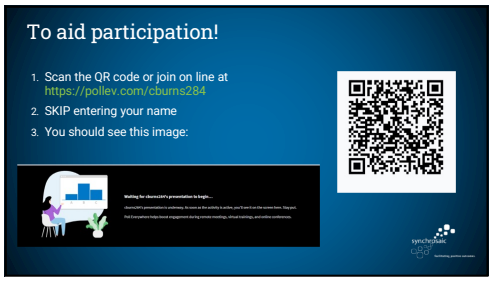

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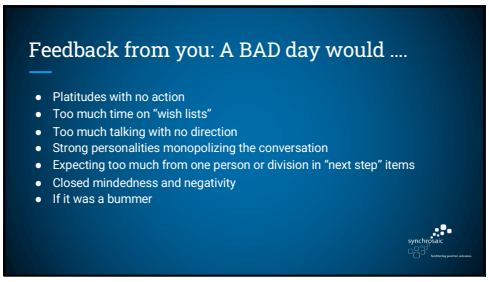

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1

WCMHS Strategic Planning Retreat 6/22/22

Feedback from you: Success looks like....

- An outline of a strategic plan that
  - Everyone hates part of .....that will help us move forward
  - That is tangible, attainable, with clear action steps
  - We can agree on
- A better understanding of division specific goals
- Collegial experience
- Clear understanding of organizational priorities

7

Ground Rules

- Take turns talking and sharing ideas
- Welcome new ideas
- Take a break if you need one
- Try to be an "opti-realist"
- Tolerate being redirected
- Stay on task
- Be respectful of others experiences and opinions
- Be here....

8

Debrief

1. How were you impacted by the pandemic?
2. What promoted your resiliency?
3. As you move forward, what do you want to keep in your life?

9

What my division would like you to know....

Take a moment and describe what your division needs from the 10,000 foot view.

10

Feedback from Community Stakeholders

- 8 responses
  - Law enforcement/First responder
  - Community providers
  - State Agency
  - Home health
- Have contact with the agency at least 2 to 3 times per month or more (1 has daily contact)
- Huge variability in familiarity with WCMHS programs - with Emergency Screeners, CSP, and CCPS being the MOST familiar programs

11

Feedback form Community Stakeholders

- All satisfied or very satisfied

  "I think WCMHS is a tremendous community resource - we are lucky to have you"

  "I find your staff to be caring, conscientious, and competent - you just need more of them and the ability to pay them"

12

2

WCMHS Strategic Planning Retreat 6/22/22

Feedback form Community Stakeholders

"I would recommend WCMHS for employment"

- 7 likely or very likely
- 1 - very unlikely

"….I would certainly recommend WCMHS. I know they have a vast array of employment opportunities…I've only heard positive things about their work culture."

"My impression is it is very stressful, underpaid worker. But very important and good - would depend on where someone is in their career, how much they needed to make, and how much stress they could tolerate"

13

Feedback from Community Stakeholders

"I would recommend WCMHS to family and friends for services"

- 5 - Very likely
- 3 - Likely

"Depends upon how quickly they needed to get help. If it was quickly, I might not recommend it. If it could wait awhile, I would. The supports are very good once you get them."

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Feedback from Community Stakeholders

"What do you value most about WCMHS?"

- Partnerships
- Community based care
- Quality leadership
- Engagement
- Compassion and respect of workers
- Commitment to meeting clients where they are at
- Commitment to mission
- Extensive services

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Feedback from Community Stakeholders

"What do you believe WCMHS should improve?"

- **Waitlists**
- Access for other providers to be in touch about shared clients
- **Pay staff more so that you can attract and retain staff**
- **Communicate more with me**
- More services
- Funding
- Refine your message to provide clarity about the services you provide

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Feedback from Community Partners

"Opportunities for Innovation"

- Replicate the integration of MH in the Barre PD
- Always have been on the leading edge of innovation
- Lots of ideas - contingent on funding! Including:
  - Expand peer workforce to street outreach/homelessness work, supported employment and recovery coaching
- Continue connection with community partners - could the COSA model be adapted to get the broader community involved in WCMHS work?
- Flex into what is appropriate for the evolving needs in a post-pandemic community

17

Feedback from Community Partners - Priorities

Improve access to services

- Supported housing
- Peer workforce
- Mental health services
- COVID Prevention
- Services to kids and youth

Stabilize workforce

- Hire more people
- Pay them more
- Workforce development

Financial Stability

- Lobby for additional resources

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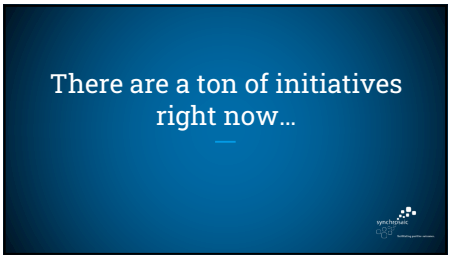

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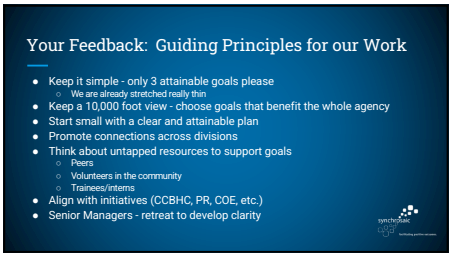

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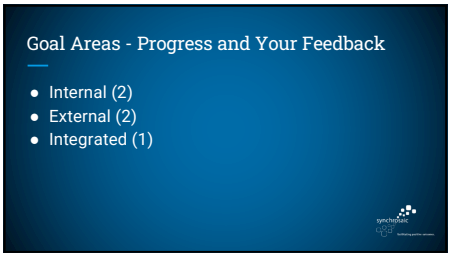

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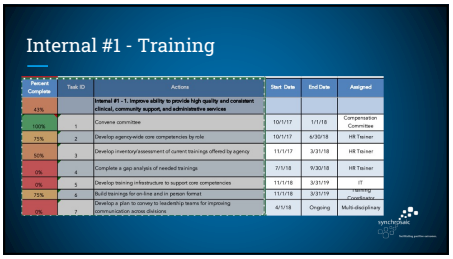

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Internal #2: Technology

100%		**Internal #2 - Assess current state of technology and its use at WCMHS to help develop web-based technology, technology awareness, support of unified electronic health record, and interoperability with external system**			
100%	1	Convene committee and identify chairperson	6/1/17	6/30/17	UEMR Committee
100%	2	Develop a workable and updated intranet	11/1/17	10/1/018	IT
100%	3	Develop a plan for building technology awareness and use	10/31/18	Ongoing	Multi-disciplinary
100%	4	Assess how to leverage our technology to address specific organizational needs	Ongoing	Ongoing	UEMR Committee
100%	5	Implement plan for the unified electronic health record -new system	Ongoing	3/1/20	Multi-disciplinary

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Internal: Increase Staff Effective Use of Hardware and Software

- Teach staff how to use technology to improve their work**
- Upgrade devices to meet demands of technology (e.g., larger screens for EMR; compatible signature pads)
- Data analytics and software - have data at the ready, use it to inform decisions, model its use
- Upgrade the HR and PR system
- Integration with outside systems (e.g., CVMC)+
- Address security and automation

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External #1 - Diversify Revenue Streams

71%		**External #1 - Diversify and create alternative revenue streams**			
100%	1	Convene committee and identify chairperson	7/1/17	7/30/17	Friends of WCMHS
100%	2	Develop donor list	7/1/17	Ongoing	Friends of WCMHS
100%	3	Identify needs per program	11/1/17	5/30/18	PR and Senior Managers
100%	4	Identify grant possibilities	7/1/17	Ongoing	PR
100%	5	Discuss expanded service coverage of private insurers with emphasis on cost effectiveness of community services	7/1/17	Ongoing	Senior Managers
0%	6	Relationship building with sponsors and donors via a newsletter and recognition event	7/1/17	Ongoing	PR and Friends of WCMHS
0%	7	Estate giving - cultivate relationship with large donors	7/1/17	Ongoing	PR and Friends of WCMHS

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External: Stabilize the Balance Sheet to Promote Workforce Stability

- Diversify funding streams
  - Commercial insurers - expand coverage
  - Grants
  - Friends of WCMHS
  - Estate giving
- Advocacy/lobbying

Promote a, "...rich work environment based upon self-care with opportunities to grow and advance"

+Overlaps with External - Community Knowledge

28

External #2: Increase community knowledge re: WCMHS

25%		**External #2 - Increase community member and partner agency knowledge of services provided by WCMHS through public relation and community education activities**			
0%	1	Convene committee and identify chairperson	11/1/17	11/30/17	Public Relations?
50%	2	Inventory current community education activities	12/1/17	Ongoing	Public Relations?
0%	3	Survey community partners and/or public via website to identify interests (use social media)	12/1/17	1/31/18	Public Relations?
50%	4	Outreach to communities to present forums	7/1/17	Ongoing	Public Relations?
0%	5	Develop ongoing series from community interest survey conducted in previous year	3/1/18	6/30/18	Public Relations?
0%	6	Examine development of web-based trainings, podcasts, and links on website	7/1/19	6/30/20	Public Relations??
100%	7	Expansion of wellness offerings to community	7/1/17	Ongoing	Wellness Committee
0%	8	Market trainings and specialty consultations externally	1/1/19	Ongoing	IT and Training Committee

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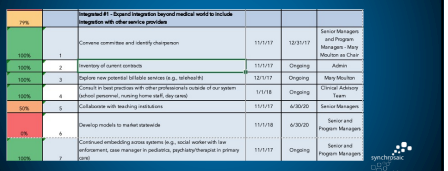
External: Promote Community Knowledge of WCMHS through Public Relations and Community Education

Convene committee and identify a chairperson to:

- Inventory community education activities
- Survey community about interests
- Develop a community education series
- Involve/collaborate with community partners (e.g., THRIVE - community conversations re: EDI)

30

Integration #1: Expansion to other service providers



		Integrated #1 - Expand integration beyond medical world to include integration with other service providers			
79%					
100%	1	Convene committee and identify chairperson	11/1/17	12/31/17	Senior Managers and Program Managers - Mary Moulton as Chair
100%	2	Inventory of current contacts	11/1/17	Ongoing	Admin
100%	3	Explore new potential billable services (e.g., telehealth)	12/1/17	Ongoing	Mary Moulton
100%	4	Consult in best practices with other professionals outside of our system (school personnel, nursing home staff, day care)	1/1/18	Ongoing	Clinical Advisory Team
50%	5	Collaborate with teaching institutions	11/1/17	6/30/20	Senior Managers
0%	6	Develop models to market statewide	11/1/18	6/30/20	Senior and Program Managers
100%	7	Continued embedding access systems (e.g., social worker with law enforcement, case manager in pediatrics, psychiatry/therapist in primary care)	11/1/17	Ongoing	Senior and Program Managers

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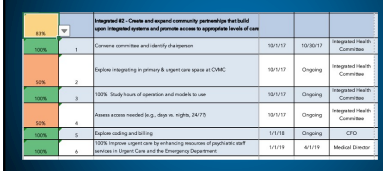
Integration #2: Community Partnerships



		Integrated #2 - Create and expand community partnerships that build upon integrated systems and promote access to appropriate levels of care			
83%					
100%	1	Convene committee and identify chairperson	10/1/17	10/30/17	Integrated Health Committee
50%	2	Explore integrating in primary & urgent care space at CVMC	10/1/17	Ongoing	Integrated Health Committee
100%	3	100% Study hours of operation and models to use	10/1/17	Ongoing	Integrated Health Committee
50%	4	Assess access needed (e.g., days vs. nights, 24/7?)	10/1/17	Ongoing	Integrated Health Committee
100%	5	Explore coding and billing	1/1/18	Ongoing	CFO
100%	6	100% Improve urgent care by enhancing resources of psychiatric staff services in Urgent Care and the Emergency Department	1/1/19	4/1/19	Medical Director

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Integration: Continue to Integrate with other Providers to Meet Community Needs

- Continue to embed and collaborate services and programs
- Assess access needs in the community (e.g., days/hours)
- Explore integrating in primary and urgent care spaces at CVMC (50%)

33

LUNCH

Return Activity -

The best lunch I ever had....

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Next Steps

Activity 1: Using the final list of Strategic Plan Goals, brainstorm specific objectives/activities for each goal

Activity 2: Prioritize objectives within each goal area

Activity 3: Develop a specific plan for the top activity within each goal area to include:

1. Steps to final product or process
2. Suggested timeline with short and long term goals
3. Assignment of tasks
4. Resources needed

35

Activity 1

Using the final list of Strategic Plan Goals, BRAINSTORM specific activities for each goal

Ask yourself, "What would that look like when it is accomplished?"
Move around the room in groups of 2 and add to the list – we can review later..

NOTE: Focus on 2 years of work using ATTAINABLE goals that are within the scope of what people can do right now

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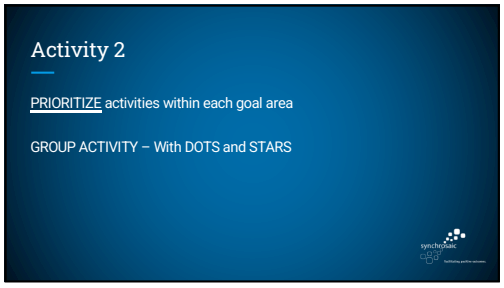
WCMHS Strategic Planning Retreat 6/22/22



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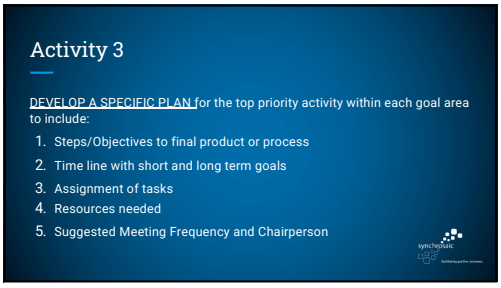

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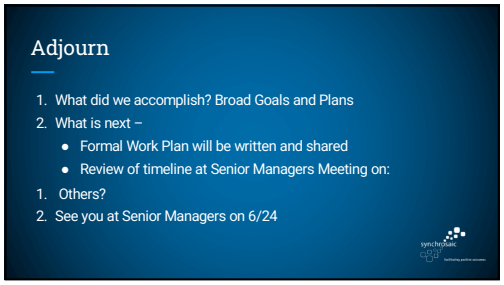

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Appendix H: Resources – Communication

An interesting overview of reconfiguring communication in a "post-pandemic" business world: https://www.mckinsey.com/business-functions/people-and-organizational-performance/our-insights/communications-get-personal-how-leaders-can-engage-employees-during-a-return-to-work

Comments on communication: https://www.fastcompany.com/90655323/fearing-a-chaotic-post-pandemic-workplace-fix-it-by-going-all-in-on-this-1-thing

General suggestions: https://www.forbes.com/sites/forbesnonprofitcouncil/2021/09/09/how-to-improve-the-workplace-in-a-post-pandemic-world/?sh=5a4edd8f5000

Resources: https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/managingorganizationalcommunication.aspx

Suggestions from education: https://www.recesslab.org/resources/spread-positive-communication/

Suggestions for building connections: https://hbr.org/2022/01/how-leaders-can-build-connection-in-a-disconnected-workplace

Fostering connections: https://www.forbes.com/sites/forbesbusinesscouncil/2022/01/07/14-ways-to-foster-connection-between-employees/?sh=5199412f667f