



Strategic Plan

Fiscal Years 2018-2019

Dr. Edith Foster, Board President

A handwritten signature in black ink, appearing to read "Edith Foster", written over a horizontal line.

Approved by the Board of Directors

WellStone, Inc.

December 19, 2017

OVERVIEW

WellStone, Inc. was incorporated in 1969 as a result of the 1967 Alabama Legislature passing Act 310 that authorized the creation of regional mental health planning authorities in communities across the state. In 2017, Huntsville-Madison County Mental Health Board and the Cullman Area Mental Health Authority merged and is now known as WellStone. An 18-member Board of Directors governs the non-profit organization, with six of the membership appointed by the city of Huntsville, six of the membership appointed by the Madison County Commission, three of the membership appointed by the city of Cullman and three of the membership appointed by the Cullman County Commission. Located downtown for over 30 years, the organization's corporate office is now located on South Memorial Parkway in Huntsville with another primary location at 1909 Commerce Drive in Cullman.

WellStone serves the residents of **Madison and Cullman Counties in Alabama**. Located in two of the fastest growing areas of Alabama, according to the 2016 census estimate the population of the Huntsville metro area was 449,720. The estimated population of Cullman County was 82,005.

WellStone provides community-based services to **people with mental health and/or substance use disorders**. In 2017, WellStone served 10,374 people in Madison County.

The **description of services** provided by WellStone includes centralized Access to Care for children and adults and a broad continuum of mental health and substance abuse treatment including:

- **Child & Adolescent Services:** Through the Nova Center for Youth & Family, services include individual, group, and family counseling, school-based counseling, case management and intensive in-home teams, the Academy therapeutic preschool, psychiatric and nursing supports, and outpatient treatment for substance use disorders.
- **Adult Services:** Services include individual and group counseling, case management and intensive in-home teams, Assertive Community Treatment, day treatment programs, residential facilities including apartments and group homes, crisis residential and acute care, psychiatric and nursing supports, and outpatient treatment for substance use disorders through New Horizons Recovery Center.
- **Specialty Services:** Community education is provided on a wide variety of topics, including Mental Health First Aid for both adolescents and adults.

WellStone exists “to restore hope and healthy living” (**vision statement**) by “providing comprehensive behavioral health services in the community” (**mission statement**). The keys to success at WellStone are known as “strategic anchors” and they include adherence to the following:

- **Quality Focused:** Producing measurable results that change people’s lives.
- **Timely Access:** Meeting people’s needs with the right care at the right time.
- **Cost Effective:** Using efficiencies to be affordable and financially sustainable.

The core values of the organization shape how we behave and are known as the 3 Cs:

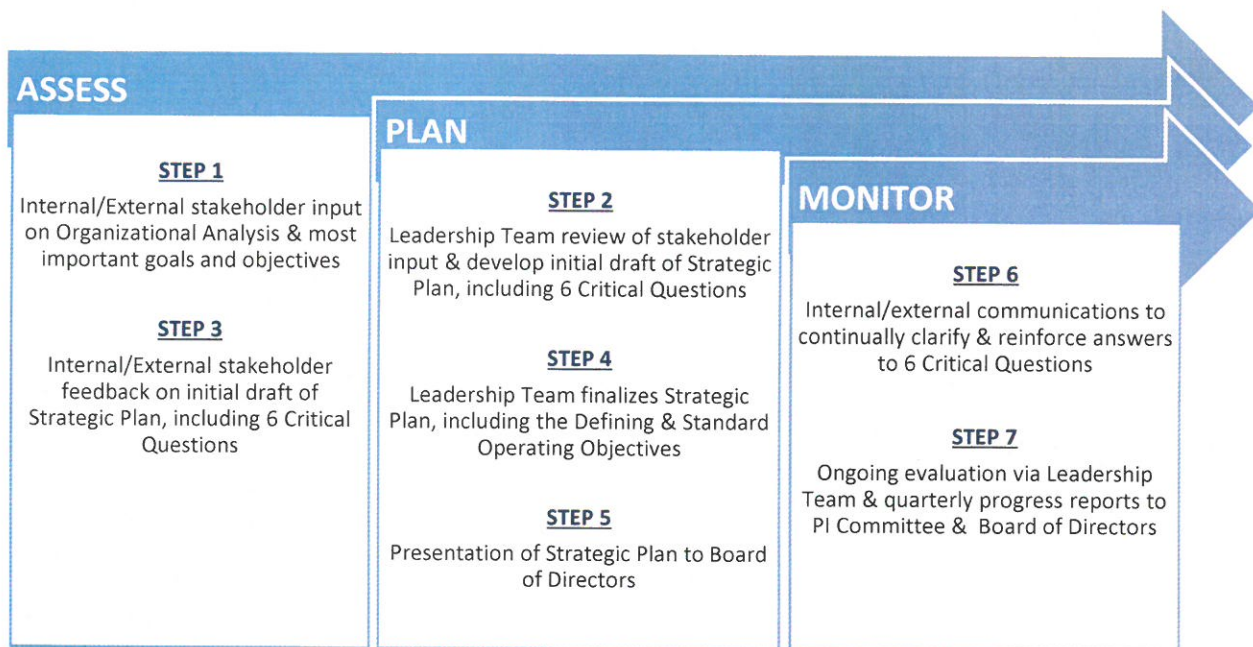
- **Caring:** We are compassionate towards those impacted by behavioral health disorders.
- **Committed:** We are dedicated to one another through collaboration and teamwork.
- **Can-Do:** We are optimistic problem-solvers who do what it takes to get the job done.

ASSESSMENT PROCESS

WellStone employs a strategic planning process that gathers input and feedback from a wide variety of internal and external stakeholders. The **planning cycle timeframe** occurs every two years in accordance with the established fiscal year calendar, is completed during the last quarter (90 days) of the two-year period, and is primarily the responsibility of the WellStone Leadership Team, comprised of the CEO, COO, Chief Clinical Officer, and Chief Resource Officer. **Key stakeholders and roles** consulted during the assessment phase of planning include the Board of Directors, employees, clients and families, local government, and local partnering agencies and organizations. **Methods of needs assessment** includes gathering input and feedback through written surveys and face-to-face discussions. An analysis is completed, and six critical questions are addressed: Why does WellStone exist (vision)? What does WellStone do (mission)? How do we do it (values)? How will we succeed (strategic anchors)? What is most important right now? And, who does what?

Once the strategic plan is developed and approved by the Board of Directors, ongoing monitoring and evaluation occurs with revision of the plan as needed and regular progress reports.

A description of the planning cycle is summarized as follows:



PLANNING OUTCOMES

Based on the analysis conducted by the WellStone Leadership Team and input and feedback received from internal and external stakeholders, the **areas of greatest unmet need** in the community were identified as:

- Locally available residential services and acute care inpatient treatment for adults.
- Funding for adults with no third-party reimbursement and for expansion of technology.
- Availability of psychiatrists and certified nurse practitioners as well as qualified personnel to deliver treatment services.

WellStone’s **current funding resources** are comprised of Federal and State funds, local government appropriations, Medicaid, commercial insurance, private pay, and other grants and contracts. Assuming adequate funding exists to enable the expansion of available services, the highest priority **service expansion needs** over the next two years were identified as:

- School-based mental health services for children and adolescents in all elementary, middle, and high schools in all five local school districts.
- Preschool day treatment services in Cullman County.
- Outpatient and outreach services for the growing geriatric population.

- Outreach case management services for adults involved in the criminal justice system and homeless community, including jail diversion programs and law enforcement support.
- Substance abuse treatment services in the schools.
- Integration of behavioral health & primary health services for adults with a serious and persistent mental illness who lack adequate access to primary healthcare treatment.

With all of this information considered, the primary **Goals & Objectives** in the WellStone Strategic Plan for FY 2018-2019 are prioritized as follows:

1. Focus on financial metrics by improving the financial health and long-term sustainability of the organization by strategically growing targeted services. Defining measures are:
 - A. Increased overall revenue.
 - B. Increased financial reserves.
2. Focus on customer metrics by improving the customer experience. Defining measure is:
 - A. Increase the number of clients receiving three or more therapy sessions.
3. Focus on internal business processes by improving our business processes. Defining measure is:
 - A. Increase the efficiency of our electronic health record.
4. Focus on learning and growth by redesigning our Quality Assurance and Performance Improvement Systems. Defining measures are:
 - A. Develop a Performance Improvement manual.

EVALUATION & MONITORING

WellStone is certified by the Alabama Department of Mental Health (ADMH) for the provision of care to children and adults with a mental health and/or substance use disorder. All certification scores are published on the ADMH website and the organization's strategic plan is submitted through and approved by ADMH in accordance with the established administrative code.

In addition, WellStone has a fully developed and implemented Performance Improvement Plan on file with ADMH that governs the ongoing monitoring and evaluation of the organization's strategic plan. Specifically, the WellStone Leadership Team, led by the Chief Executive Officer, is responsible for regular monitoring of the strategic plan and will make quarterly progress reports on all goals and objectives to the Performance Improvement Committee for inclusion in the quarterly Performance Improvement report to the Board of Directors. When monitoring the status of the strategic plan goals and objectives, the Leadership Team will use the following scale:

- Red: Minimal progress.
- Yellow: Some progress.
- Green: Completed.

The scorecard utilized by the Leadership Team for regular monitoring and quarterly progress reports with established metrics for the objectives and measures is as follows:

Objectives	Increase Growth	Improve the Customer Experience	Improve our Business Processes	Redesign our QA and PI Systems
Measures	Increase Overall Revenue and Reserves.	Increase Retention Rates	Increase Efficiency of Avatar	Develop a PI Manual

The strategic plan for WellStone is a living and breathing document that is subject to continual evaluation and modification as circumstances warrant. Ultimately, the health of the organization and the success of this strategic plan is dependent on the cohesion of the Leadership Team and all WellStone staff, the clarity and lack of confusion for what is to be accomplished, the effectiveness of communications with all stakeholders, and the reinforcement of what is most important to the organization.