



Strategic Plan

Fiscal Years 2023-2024

Jason Calhoun, Board President

A handwritten signature in black ink that reads 'Jason Calhoun'. The signature is written in a cursive style and is positioned above a dashed horizontal line.

Approved by the Board of Directors

Mental Health Boards of Chilton & Shelby Counties, Inc.

April 12, 2023

Overview

The **Mental Health Board of Chilton and Shelby Counties, Inc.** was founded in 1972 as a result of Act 310, which established regional mental health boards across Alabama. In its first 48 years of incorporation, the organization was commonly known as the Chilton Shelby Mental Health Center. January 2020 brought a new look and name, Central Alabama Wellness (CAW). A 10-member Board of Directors governs the non-profit organization, with half of the membership appointed by the Chilton County Commission and the other half of the membership appointed by the Shelby County Commission. CAW has offices established in Calera, Pelham, North Shelby County, and Clanton.

Through mental health services and substance use treatment services, CAW serves Chilton and Shelby Counties. Through care coordination for individuals with intellectual disabilities, CAW serves not only **Chilton and Shelby Counties, but also Autauga, Elmore, Lee, Russell, Tallapoosa, and Chambers Counties**. According to the 2018 census estimate, the population of these counties are:

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|-------------------|----------------------|
| • Shelby: 230,115 | • Lee: 180,773 |
| • Chilton: 45,884 | • Russell: 58,555 |
| • Autauga: 59,759 | • Tallapoosa: 40,977 |
| • Elmore: 89,567 | • Chambers: 34,088 |

CAW provides community-based services to **people with mental health disorders, substance use disorders, and intellectual/developmental disabilities**. In Fiscal Year 2022, CAW served 3,749 people in their catchment area.

CAW **Services are described** as follows:

Access to Care: This program serves as the gateway to our therapeutic services through registration, insurance verification, scheduling, and preliminary screening.

Child & Adolescent Services: These programs include individual, group, and family therapy, intensive in-home services, case management, psychiatric and nursing support, and outpatient treatment for substance use disorders.

Adult Services: Programs aimed at adults include individual and group therapy, case management, intensive in-home services, day treatment, residential facilities, psychiatric and nursing supports, supported employment services, and outpatient treatment for substance use disorders.

Specialty Services: Community education is provided on a wide variety of topics, including Mental Health First Aid, Youth Mental Health First Aid, Court Referral Programs for anger management and domestic violence, and drug and alcohol abuse prevention.

CAW exists with a view to helping people “Live life well,” (**vision statement**) by helping improve the quality of life for individuals affected by mental illness, substance use, and intellectual disability through high quality provision of services to clients and their families (**mission statement**).

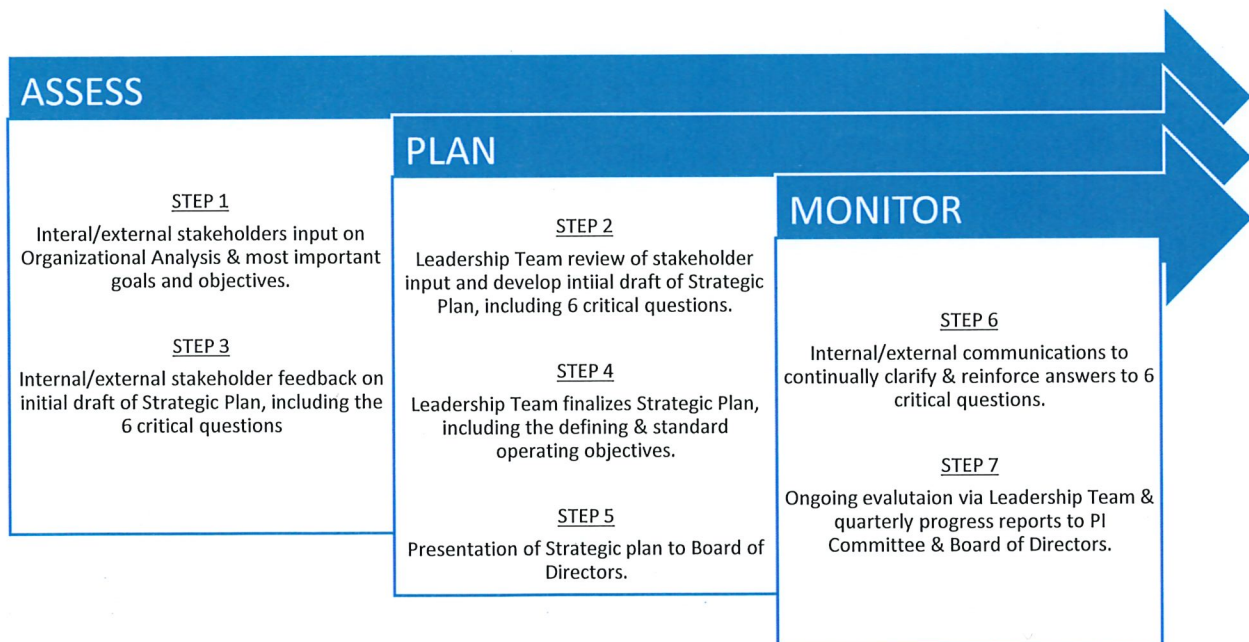
Assessment Process

CAW 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, is completed during the last quarter (90 days) of the two-year period and is primarily the responsibility of the CAW Leadership Team, comprised of the Executive Director; Chief Financial Officer; Clinical Director; Chief Operations Officer; and the president, vice president, and the secretary of the organization's Board of Directors. . **Key stakeholders and roles** consulted during the assessment phase of planning include the Board of Directors, employees, Human Rights Committee, clients and families, local government, and local partnering agencies and organizations. **Methods of needs assessment** include gathering input and feedback through written surveys and face-to-face discussion. An analysis of the feedback is completed, and six critical questions are addressed:

1. Why does CAW exist (vision)?
2. What does CAW do (mission)?
3. How do we do it (values)?
4. How will we succeed (strategy)?
5. What is most important right now?
6. 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 below:



Planning Outcomes

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

- Funding for adults with no third-party reimbursement
- Higher intensity (Level 2.1) substance use services for adults and adolescents
- Increased collaboration with community partners to provide community-based treatment
- Decreased turnover rate among staff in direct care roles

CAW's **current funding resources** are comprised of Federal and State funds, local government appropriations, Medicaid, commercial insurances, 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:

- Outpatient and outreach services for individuals with substance use issues
- Intensive treatment programs for children and adolescents with serious emotional disturbance
- Integration of behavioral health and primary health screening for adults with serious and persistent mental illness who lack adequate access to primary healthcare.

With this information considered, the primary **Goals & Objectives** in the CAW Strategic Plan for FY 2023-2024 are prioritized as follows:

1. Focus on customer/community metrics by increasing the number of ongoing therapy appointments as clinically appropriate. Defining measure is:
 - a. Increase in the number of clients seen per month
 - b. Increase of successful community partner collaborations
2. Focus on internal business processes by improving our business processes. Defining measure is:
 - a. Decrease in the percentage of adjustments of charges
 - b. Increase in organization's capacity to pull down revenue from different funding sources
3. Focus on learning and growth by improving the onboarding and orientation of employees. Defining measures are:
 - a. Refining the training program
 - b. Increased employee retention

Evaluation & Monitoring

CAW is certified by the Alabama Department of Mental Health (ADMH) for the provision of care to children and adults with mental health and/or substance use disorders and intellectual/developmental disabilities. 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, CAW 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 CAW Leadership Team, led by the Executive Director, 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 used by the Leadership Team for regular monitoring and quarterly progress reports with established metrics for the objectives and measure is as follows:

Objectives	Increase the number of ongoing therapy appointments	Improve business processes	Refine the onboarding, orientation, and retention of employees
Measures	Increase number of clients seen and successful community partner collaborations per month	Decrease adjustments of charges and increase capacity to draw down additional funding sources	Improve existing training program and improve quality of job coaching

The strategic plan for CAW is a temporal document 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 CAW staff, the clarity and lack of confusion about what is to be accomplished, the effectiveness of communications and quality of relationships with all stakeholders, and the reinforcement the organization's mission and vision.