



Strategic Plan

Fiscal Years 2024-2025

Becky Vansant, Board President

A handwritten signature in blue ink that reads "Becky Vansant".

Approved by the Board of Directors

WellStone, Inc.

November 21, 2023

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 at 1131 Eagletree Lane 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 2020 census estimate the population of the Huntsville metro area was 514,000 and growing becoming the largest city in Alabama in 2021. The estimated population of Cullman County was 90,000.

WellStone provides community-based services to **people with mental health and/or substance use disorders**. In Fiscal Year 2023, WellStone served over 12,000 people in Madison and Cullman Counties.

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:

- **Diversion Services:** WellStone opened one of the state's first crisis diversion centers this past year along with a mobile crisis team and co-responders working with law enforcement agencies. These diversion services provide a much-needed resource in our communities to deflect those in a mental health crisis away from emergency departments and jails. These services also ensure comprehensive follow up after the crisis has subsided.
- **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, jail diversion, 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.
- **Crisis Services:** WellStone operates one of the state’s first crisis centers with over 150 admissions per month. In addition, WellStone operates children and adult focused mobile crisis teams in both Cullman and Madison counties. We also are the call center for 988 in North Alabama.

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.

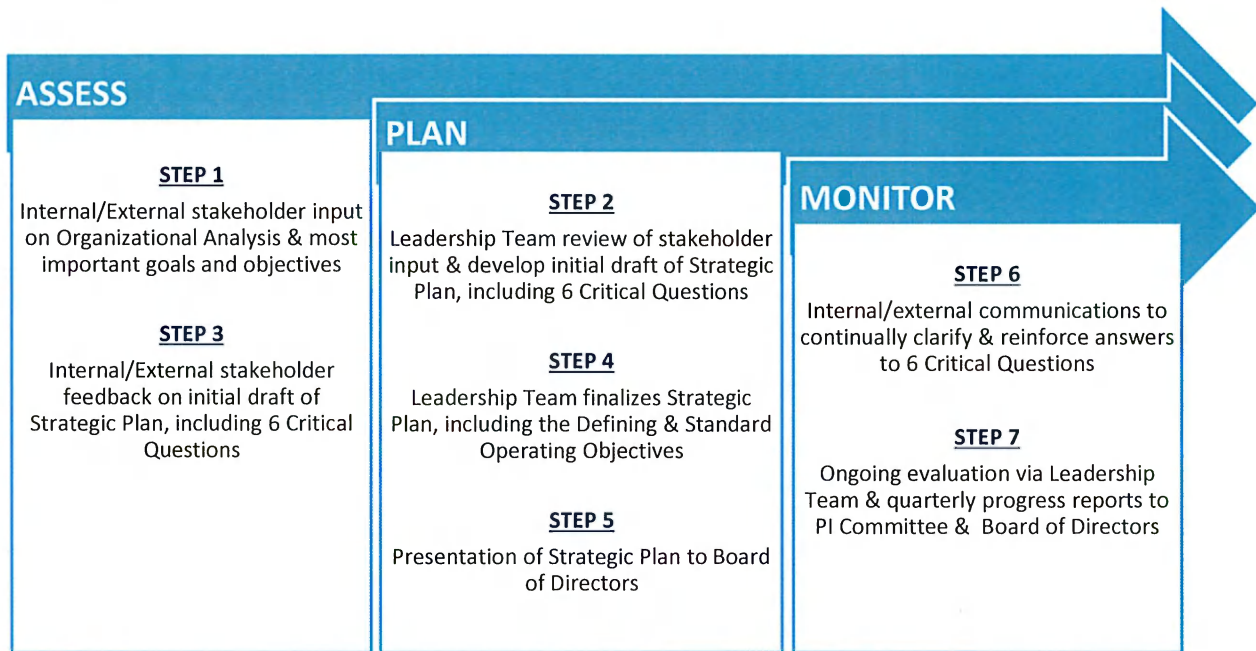
ASSESSMENT PROCESS

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, CFO and Chief Clinical Officer. **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** 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:

- Adequate housing options to meet our clients’ needs.
- Funding for medications for our adult clients with no third-party reimbursement.
- Recruiting and retaining a qualified workforce.

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:

- Crisis stabilization services for civil commitment adults.
- Supervised housing for adult clients.
- Integration of behavioral health & primary health services for adults and children with a serious and persistent mental illness who lack adequate access to primary healthcare treatment.

With this information considered, the primary **Goals & Objectives** in the WellStone Strategic Plan for FY 2022-2023 are prioritized as follows:

1. Focus on financial metrics by maintaining the financial health and long-term sustainability of the organization by strategically growing targeted services. Defining measures are:
 - A. Increased overall revenue.
 - B. Maintain financial reserves.
2. Focus on customer metrics by improving the implementation of CCBHC access to care standards. Defining measure is:
 - A. Clients will be seen for routine appointments in 10 days.
 - B. Clients will be seen for urgent appointments within 1 day.
 - C. Clients will be seen for emergency appointments immediately.
3. Focus on growth by expanding our continuum of care. Defining measure is:
 - A. Add or expand service lines.
4. Focus on employee engagement by improving the onboarding and orientation training of employees. Defining measure is:
 - A. Enhance the employee onboarding experience.

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	Maintain Financial Stability.	Improve the Implementation of CCBHC Access to Care Standards.	Expand our Continuum of Care.	Improve the Onboarding and Orientation Training of Employees.
Measures	Increase Overall Revenue and Maintain Reserves.	Routine Appointments – 10 Days Urgent Appointments – 1 Day Emergency Appointments - Immediately	Add or Expand Service Lines.	Enhance Onboarding Experience.

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.

WELLSTONE'S 2024-2025 STRATEGIC SCORECARD

	Objectives	Measures	Targets	Initiatives
Financial	Maintain financial stability.	Increase overall revenue. Maintain reserves.	Increase percentage of client services delivered by 5%. Maintain 90 days cash on hand.	<ol style="list-style-type: none"> 1. Program financials implemented. 2. Department productivity meetings will be held.
Customer	Improve the implementation of the CCBHC access to care standards.	Routine appointments – 10 days. Urgent Appointments – 1 day. Emergency Appointments – Immediately.	Be 100% compliant with standards by June 1, 2024.	<ol style="list-style-type: none"> 1. Expand after hours appointments. 2. Create walk in system for appointments.
Growth	Expand our continuum of care.	Add or expand service lines.	Establish new locations for service lines.	<ol style="list-style-type: none"> 1. Develop better handoffs between programs through care coordination. 2. Identify service lines that need expansion.
Employee Engagement	Improve the onboarding and orientation training of employees.	Enhance the onboarding experience.	Increase employee satisfaction scores at 90 days post-onboarding.	<ol style="list-style-type: none"> 1. Recruit and assign peer mentors to new employees. 2. Develop onboarding and training materials regarding company operations.