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Aspire to Excellence

Strategic Planning

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 <p>Fountain FOHFS</p>	Fountain of Hope Family Services Inc.		Policy and Procedures
	Policy Type:-	Aspire to Excellence	Policy# ATE-108
	Subject:-	Strategic Plan	Adopted:- 05/06/2014
	Section:-	(1.C)	Effective:- 06/11/2015
	Approval By:-	Michael Gladipo	Revised:- 08/15/2020

Executive Summary

Fountain of Hope Family Services, (FOHFS) is a community based outpatient Agency dedicated to filling gaps in services to Oklahomans with mental health. **(FOHFS Agency)** has been serving people in Oklahoma since **2014**.

Our intent is to engage in a strategic planning process every **4 years** in which a variety of **input** and information is **analyzed**. This information comes from **consumers** of our services, **referral sources**, **community groups**, **fundors**, and also aggregate **demographic data**. The process also includes an analysis of the **FOHFS** agency's **strengths**, and **weaknesses** and emerging opportunities and potential **threats**. Out of this process a **strategic plan is formulated** and the "critical issues" for the **FOHFS Agency** are developed and measurable goals are developed to address them.

Our Mission, Vision, and Guiding Principles

► Mission of FOHFS

Our mission at **Fountain of Hope Family Services** is to provide quality and excellent services to all at-risk youth in OJA, DHS custody, their families and other members of the community. In addition, our aim is to assist in reunification of families, reducing psychiatric impairment and assisting individuals with behavioral challenges to enhance the quality of their life. We are committed to serve the needs of each family with compassion, respect and dignity. Delivering of highest quality service to each client we have the privilege to serve is our goal.

► Employee Vision Statement

Fountain of Hope Family Services, Inc. will continue to evolve, grow and provide excellent services at affordable cost to our community. We will continue to provide an environment that is safe, confidential and professional for our clients and staff.

► Guiding Principles

We commit ourselves to these Guiding Principles:

1. **Principle of Excellence:** - we shall always strive to excel in our compliance with rules, regulations, and expected outcomes
2. **Principle of Professionalism:** - we shall be professional in our interactions, in our appearance, and in our work ethic

3. **Principle of Beneficial Reciprocity:** - we shall keep in mind the direct relationship between individual productivity and organizational productivity
4. **Principle of Order:** - we shall always respect our policies, our leaders/supervisors, and each other
5. **Principle of Unrelenting Faith:** - we shall not allow trials and tribulations to undermine the power of our beliefs
6. **Principle of Focus:** we shall always remember why we are here, who we serve, and what we are expected to accomplish
7. **Principle of Effectiveness:** we shall strive to deliver meaningful and measurable benefits to our persons served
8. **Principle of Awareness:** we shall treat our persons served in the manner that our doctors treat us
9. **Principle of Clinical Protocol:** we shall keep in mind the Clinical nature of our work and perform at or above industry standards

Strategic Planning Defined

Strategic planning is the process for **FOHFS Agency** to address agency goals for all performance improvement activities. All goals and strategies are developed as a result of the **input** obtained from **persons served**, **personnel**, and other **stakeholders**. The strategic plan is reviewed on an **annual basis** by the **Management Team** to determine advancement and sustainability towards goals as well as formulating additional **goals** to address future **developments**.

(1. C.1):- The Ongoing (FOHFS) Strategic Planning Includes:

- a. Expectations of persons served
- b. Expectations of other stakeholders
- c. The competitive environment
- d. Financial opportunities
- e. Financial threats
- f. The agency's capabilities
- g. Service area needs
- h. Demographics of the service area
- i. The agency's relationships with external stakeholders
- j. The regulatory environment
- k. The legislative environment
- l. The use of technology to support:
 - (1) Efficient operations
 - (2) Effective service delivery
 - (3) Performance improvements
- m. Information from the analysis of performance

Sources of Input and Information

In preparation for the creation of this strategic plan, **FOHFS Agency** has been working with local stakeholders to identify:

- ✓ Unmet mental health needs
- ✓ Strengths and areas of improvement for **FOHFS Agency**
- ✓ Opportunities for expansion
- ✓ Current and future threats that may impact **FOHFS Agency** ability to support individuals and families with mental health needs.
- ✓ Innovative and evidenced based approaches and models to providing and supporting mental health services.

Input and information came from a variety of sources

- ✓ Mental Health Community Forum:
- ✓ Community Needs Assessment
- ✓ Stakeholder Satisfaction Survey
- ✓ Strengths, Weaknesses, Opportunities & Threats Analyses
- ✓ Employee Needs Assessment and Satisfaction Survey
- ✓ **FOHFS Staff**

Services

FOHFS Agency provides an array of quality mental health services to **individuals** and their **families**. The service population includes people of all age ranges. Specifically, services include assessment, and counseling. A large **percentage** of the people we serve have a **diagnosis** of mental health illness.

Strategic Integrated Planning

→ (1.c.1.a):- **Expectations of person's served**. To ensure that person's served are satisfied with the services **FOHFS Agency** will administer **satisfaction surveys** that will be completed each **quarter** and a summary will be presented to the **Executive Director**. The information from satisfaction surveys will be used to **improve** and **address** concerns and expectations of the person's served in the services provided by **FOHFS Agency**.

→ (1.c.1.b):- **Expectations of other stakeholders**. To ensure the expectations of referrals sources are addressed a log is maintained of each phone call from a referral source recording concerns or compliments. These concerns and compliments will be addressed in quarterly meetings and will be included in the strategic planning of **FOHFS Agency** programs and services.

→ (1.c.1.c):- **The competitive environment**. **FOHFS Agency** goal is to continually assess the needs of the community and to develop and provide services to meet these needs. **FOHFS** currently provides home based services to meet the need of limited transportation of person's served. **FOHFS** plans to consider programs that are limitedly

available or unavailable in the area of substance abuse, domestic violence, parenting, and anger management.

→ **(1.c.1.d):- Financial opportunities. FOHFS Agency Executive Director** reviews various funding sources including private insurance and grants for financial opportunities. These opportunities are presented in the quarterly report and integrated into the strategic planning of **FOHFS Agency** programs and services.

→ **(1.c.1.e):- Financial threats. FOHFS Agency** plans to develop a diverse funding source and referral pool to reduce financial threats.

→ **(1.c.1.f):- The organization's capabilities:- FOHFS Agency Executive Director** feels that technology can improve function and efficiency within a company. **FOHFS Agency** goal is to maintain current technology and to continuously make technical upgrades to best serve the needs of the agency. **FOHFS Agency** assigned personnel complete a Technology Assessment each quarter and presents this assessment and recommendations to the **Executive Director** during quarterly meetings.

→ **(1.c.1.g):- Service area needs.** It is the intent of **FOHFS Agency** to continuously improve services to meet the mental health need in the area served. The assigned personnel use the Internet, the referral source log, and input from stakeholders to assess mental health needs within the service area. This information is included in the financial threats/opportunities report. This report is presented to the Executive Director during quarterly meetings.

→ **(1.c.1.h):- Demographics of the service area.** Demographics of persons served are gained from Referral/Discharge Log. This information is included in the quarterly patient data report and presented to the agency personnel during quarterly meetings.

→ **(1.c.1.I):- The organization's relationship with external stakeholders. FOHFS Agency** strives to maintain a positive relationship with stakeholders by encouraging stakeholders to contact the **Executive Director** with any comments or concerns. Stakeholders are also provided with an annual report that includes **FOHFS Agency** annual report includes an introduction, program description, financial summary, human resources, assessment of community needs, technology assessment, and **FOHFS Agency** improvement goals.

→ **(1.c.1.j):- The regulatory environment.** The compliance program includes internal audits relating to services, medical records and billings by the assigned office personnel. **FOHFS Agency** has procedures to internally monitor billing and Clinical documentation on a regular and consistent basis. The reviews focus on comparisons of submitted billings and the Clinical record, and are designed to detect and prevent mistakes and violations. The reviews also include a review of quality of care, outcomes and length of treatment. The results of the audit are regularly reported to the **Executive Director**.

→ **(1.c.1.k):- The legislative environment.** The **Executive Director** of **FOHFS** has adopted a formal Company Responsibility Program. The responsibility of this program will lie with the **Executive Director**. He will oversee and implement this program. The **Executive Director** will provide for education and training programs for employees and respond to inquiries from any employee regarding appropriate billing, documentation,

coding, and business practices and investigate any allegations of possible impropriety.

(1.c.1.I):- FOHFS Agency assesses its use of technology to

→ (1):-**Enhance individual services**: Personnel are encouraged to use cell phone to call home based clients prior to driving to their home to ensure the client is comfortable with services being served in their homes, to maintain efficient operations of the agency and the services provided to the persons served.

→ (2):-**Improve efficiency** and productivity of personnel to ensure effective operations within the agency. Computers are provided for personnel who work within the office environment. All personnel are encouraged to have and to maintain a computer to complete paper work.

→ (3):-**Communicate with stakeholders**: Stakeholders are provided with the **Executive Director** cell phone number to ensure they are able to easily contact him. **FOHFS Agency** encourage all persons served, personnel and other stakeholders to provide input as they feel necessary to enhance the quality of services offered by the agency.

(1.c.M.):- Information from the analysis of performance of the agency is shared with **personnel, stakeholder** and persons served upon **request**.

(1.C.2) (FOHFS Agency) Implements written strategic plan that:

→ (1.c.2.a):- Is developed. A Strategic Planning Meeting is conducted by the Executive Director each quarter. A Strategic Planning Report is developed by the assigned personnel with input from persons served, personnel and stakeholders.

→ (1.c.2.b):- Reflects current and projected financial position. The Strategic Planning Report includes a current and projected budget for **FOHFS Agency**. This is done to assess allocating of resources necessary to support the accomplishment of the plan.

→ (1.c.2.c):- Sets

(1.) **Goals: FOHFS Agency** Executive Director reviews past goals and progress made toward goals and develops or updates goals each quarter. These goals are included in the Strategic Planning Report.

(2.) **FOHFS Agency Executive Director** reviews past priorities and progress made toward priorities and develops or updates priorities each quarter. These priorities are included in the Strategic Planning Report.

→ (1.c.2.d):- Is implemented. **FOHFS Agency Executive Director** is responsible for ensuring the implementation of the written strategic plan.

→ (1.c.2.e):- Is reviewed and updated for relevance. **FOHFS Agency Executive Director** is responsible for reviewing **FOHFS Agency** written strategic plan each quarter.

→ (1.c.2.f):-The strategic plan is updated as needed by **FOHFS Agency**.

(1.c.3) The Strategic Plan is shared with

- a. **Person's served, as appropriate:** - Person's served are provided with a copy of the Annual Management Summary upon request.
- b. **Other stakeholders, as appropriate:** - Other stakeholders are provided with a copy of the Annual Management Summary upon request.
- c. Personnel are provided with a copy of the Annual Management Summary and Strategic plan upon request.

Service Area Needs and Demographics of the service area.

FOHFS Agency primary clients are **Blacks, Caucasian non-Hispanic Whites and Native Americans** with mental health illness.

Our success in realizing our enhanced vision will be measured by the extent to which we achieve the following **Four (4) Strategic Initiatives.**

◀ **I. SERVICE:** Enhancing, creating and delivering family-centered mental health programs and services across the family life cycle to meet the current and growing needs of our community

◀ **II. AWARENESS:** Effectively telling our story to the community, conveying a message that increases the awareness of our mission and programs and demonstrates the impact of our services and the value of this organization to the community

◀ **III. STABILITY:** Achieving long-term financial stability by restoring cash reserves, increasing the depth and scope of the Agency's donor base, growing the Agency's endowment funds and implementing a new methodology for the continuous evaluation of program impact and sustainability

◀ **VI. PARTNERSHIPS:** Continuing to develop long-term strategic partnerships with key local community partners for the purpose of optimizing the use of existing resources and improving access to care for local consumers of mental health services

The economic and social effects of the budget cut in Oklahoma to mental health dominated **FOHFS Agency** for past two (2) years, and continue to reverberate through **FOHFS Agency**, have unquestionably shaped the development of our new Strategic Plan for (2018-2021). As reflected in the **SWOT** Analysis. We have a deeper understanding of our **weaknesses**, vulnerabilities and the challenges that threaten our ability to fulfill our **mission**.

In confronting the challenges placed before us, however, we have become stronger as an agency. This has been particularly evident in:

- The continued growth in leadership, **skill** and commitment of **FOHFS Agency's**
- Increased service delivery despite **diminished staffing** capacity;
- The persevering support of **FOHFS Agency** volunteer organization.
- New staff resources dedicated to expanding **FOHFS Agency** marketing and;
- Achieving re-accreditation attesting to **FOHFS's Agency** success in continuous quality improvement.

It is these **Core Strengths** that not only enable **FOHFS Agency** to plan confidently for the future, but to believe in our ability to **execute** our **plans**, achieve our **goals** and become the behavioral health Agency that we envision.

Strategic Initiatives

→ I. SERVICE

The **FOHFS Agency** will enhance, create and deliver mental health programs and services across the family life cycle to meet the current and growing needs of our community.

Goal - 1	Through 10/30/21 , the number of individuals receiving Counseling Services will increase annually by at least 15% .
Goal - 2	Best practice family-centered treatment models will be continuously evaluated for integration into FOHFS Agency service array.

◀ II. AWARENESS

FOHFS Agency will be recognized not only as a leader and advocate for family mental health and wellness, but also as the provider of choice for individuals, couples and families, at all income levels, seeking high quality, affordable, outpatient mental health services.

Goal - 1	Allocate the resources necessary to implement a defined public relations and advertising campaign promoting FOHFS Agency's distinctive competency in delivering services across the family life cycle
Goal - 2	FOHFS Agency will strengthen the measurement and reporting of its treatment outcomes to demonstrate our effectiveness to the community and communicate the impact of our work.

III. STABILITY

FOHFS Agency will achieve long-term sustainability in order to provide for the growing need for family-centered mental health treatment and wellness services within our community

Goal - 1	Complete Strong Future, Strong Families (SFSF) project and increase percentage of private fundraising revenue in addition to public funding with the goal of reaching 55% of annual budget by 2022
Goal - 2	Maximize client fee revenue through timely and accurate billing and client record-keeping practices and increased sales of employee assistance services

IV. PARTNERSHIPS

FOHFS Agency will build **long-term** strategic partnerships and **collaboration** with key local community **partners** for the purpose of increasing the overall awareness of **FOHFS Agency** and its mission; leveraging and optimizing the use of existing resources; and, improving access to care for local consumers of mental health services.

Goal - 1	By 08/30/22 - FOHFS Agency will actively pursue collaborations with the medical community to create an integrated system of primary and behavioral health care.
Goal - 2	With the dual purpose of expanding the scope and availability of needed services while maximizing the use of local resources, FOHFS Agency will continue its collaborative efforts with other providers and community organizations in planning and offering programs and services to our mutual constituencies.

Appendix A: SWOT Analysis

► Strengths

- ↯ Central and accessible location
- ↯ Greater than 6 years history serving the Community
- ↯ Family-centered approach to mental health treatment
- ↯ Expertise in the provision of family and couples therapy
- ↯ Long-term supporters
- ↯ Close working relationships with schools, law enforcement and local network of mental health service providers
- ↯ Affordable sliding scale

- ↯ Variety of prevention and early intervention programs.
- ↯ Medicare certified therapists.
- ↯ Experienced supervisors and managers.
- ↯ Frequently updated on website.

◀ **Weaknesses**

- ↯ Lack of consistent awareness-building/marketing program.
- ↯ Perceived as an agency primarily for low-income clients.
- ↯ Limited awareness of **FOHFS Agency** by area primary care physicians.

Appendix B: SWOT Analysis

⇒ **Opportunities**

- ↯ Unfulfilled demand for services.
- ↯ Advances in technology creating new awareness-building, marketing and service delivery through web site.
- ↯ Arrival to the community via anticipated merger of area health care provider with in-patient and out-patient behavioral health services.
- ↯ New collaboration with park districts in advertising agency services.

⇒ **Threats**

- ↯ Continuing erosion of federal and state funding.
- ↯ Continuing high unemployment contributing to higher levels of individual and family stress and increased need for subsidized mental health services.
- ↯ Increasing poverty rates swelling the ranks of potential Medicaid-eligible patients.
- ↯ State of Oklahoma’ budgetary crisis contributing to cuts in reimbursement for Medicaid services further aggravating **FOHFS Agency’s** cash flow shortages.
- ↯ Medicaid managed care requirements place increasing demands on Clinical and administrative staff time.

⇐ **Appendix C: Critical Issues**

MISSION/SERVICE DELIVERY

- ↯ Perennial question – How do we meet the community’s growing need for sliding scale services?
- ↯ How do we increase the availability of psychiatric services for children and adolescents?

- ↯ Should **FOHFS Agency** develop psychiatric services as a stand-alone service?
- ↯ What does **FOHFS Agency** need to do to maintain its quality of patient care while adhering to increasing managed care requirements, i.e., Medicaid managed care?
- ↯ Should **FOHFS Agency** serve clients residing beyond its catchment area?

⇐ **SOCIO-CULTURAL/DEMOGRAPHIC**

- ↯ How do we more effectively serve the needs of a growing aging population?
- ↯ How do we more effectively serve the needs of growing minority populations in our area, particularly Spanish-speaking?

⇒ **HUMAN RESOURCES**

- ↯ Do we need to do anything different to continue to recruiting & maintain qualified staff, especially part-time hourly licensed Clinician and bi-lingual (Spanish-speaking) staff?
- ↯ What do we need to do to sustain our recruiting of volunteer board members who have a passion for the agency's mission and are able to commit to the work of the Board?
- ↯ How do we restore and maintain the strength and vitality of the Friends of **FOHFS (SFSF)**.

⇒ **MARKET CHALLENGES**

- ↯ What more must we do to compete effectively within the local psychotherapy market place? What niche do we want to create especially for **FOHFS**?
- ↯ What more must we do to Increase utilization of agency Prevention & Early Intervention Programs?
- ↯ Given limited resources, how can we more effectively market **FOHFS**?

⇐ **HEALTH CARE DELIVERY**

- ↯ What role should the **FOHFS Agency** take in promoting/practicing integrated healthcare delivery in this community?
- ↯ To what extent should collaboration with other behavioral health providers continue to be a priority for this agency?
- ↯ How will advances in brain science impact the way we deliver behavioral health services?

TECHNOLOGY

- ↯ Is **FOHFS Agency's Millennium Medical System** able to meet demands of Medicaid managed care and the evolution electronic medical records?
- ↯ How must service delivery adapt to the evolution of technology and its impact on the mental health of individuals and families?

COMMUNITY/COMMUNITY OUTREACH & PUBLIC RELATIONS

- ↯ What action do we need to take to increase the awareness and profile of **FOHFS Agency** within the community?
- ↯ How do we leverage existing relationships to increase awareness and promote our mission?
- ↯ How do we engage community leaders in support of **FOHFS**?