



AWBS
ALL WELL-BEING SERVICES

2018 - 2022 Strategic Plan

Executive Summary

All Well-Being Services (AWBS) is a 501c (3) human services organization that has provided services to residents of Wayne County for sixty-five years. A Commission on the Accreditation of Rehabilitation Facilities (CARF) agency, AWBS provides an extensive range of evidence-based services for children, adults, seniors and families.

AWBS has four locations in Wayne and Macomb counties and a dedicated staff that works to offer persons served the resources necessary to enjoy a full and meaningful life. Services include: mental health, intellectual developmental disabilities services and supports, substance use disorder treatment and prevention, integrated health care, and HIV/AIDS prevention.

All Well-Being Services' President & Chief Executive Officer engaged Onyx Strategies, LLC (Consultant) to facilitate the governance board through a strategic planning process November 2017 – April 2018 to develop a dynamic three-year strategic plan that both aligns with its mission and demonstrates its ability to manifest its corporate values. AWBS wishes to position the organization for ongoing success by thoroughly and thoughtfully creating this governance-led strategic plan, against which to hold its President & Chief Executive Officer accountable.

The strategic planning process began with four pre-retreat “content discovery” sessions during which the consultant administered a strategic planning questionnaire, affirmed the stakeholders' desired goals and outcomes for the full board sessions, and garnered valuable input regarding the organization's mission, vision, values, strengths, weaknesses and successes. The sessions were highly energetic and rich with candid feedback. The consultant also had a similar pre-retreat session with AWBS's senior leadership team and members of the Board's Strategic Planning Committee to ensure that their input was considered in preparation for the board retreat.

The consultants' role at the retreat was to conduct the process and facilitate the discussion and group exercises, including brainstorming about the vision, mission and values of the organization, considering past successes and surveying the assets required to replicate those successes, and conduct the Board's Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis of the agency. The consultant was further charged with synthesizing all the information gathered and distilling it to clear directives for the next three years.

What follows is a report of the information gathered from the stakeholder pre-retreat sessions, the results of the SWOT analysis, a presentation of the tools and objectives developed during the retreat, and the recommended strategic imperatives, objectives and tactics necessary to manifest the agency's vision and mission in alignment with its core values.

Affirming AWBS' Vision, Mission and Core Values

The Board retreat timeframe lends itself well to a review and consideration of AWBS' continued alignment with its historical vision, mission, and organizational values. What follows is the newly revised (and Board adopted) mission and vision statements as well as the organization's newly adopted values.

AWBS Vision

Previous: Informed, compassionate and successful communities shaped by people of all capabilities.

Adopted: Employing best practices, AWBS (All Well-Being Services) is an inclusive and resourceful community health organization that provides services to individuals of ALL ages.

AWBS Mission

Previous: AWBS promotes health, well-being and independence through advocacy, services and community engagement.

Adopted: To meet the needs of individuals, families and the community by providing integrated health services which foster well-being and self-sufficiency.

AWBS Core Values

- Well-being of persons served
- Integrity in all we do
- Quality of services provided
- Effective resource development
- Mutually beneficial collaborations and partnerships

AWBS has identified and adopted several core values - noted above - which will guide its work. The consultant set the stage for the values discussion by asking participants to not simply regurgitate the corporate values as outlined in the website and public relations materials, but to consider what the agency's values are *based on how it expends its time, effort, energy and money*. When posed in this way, several interesting conversations ensued, and a great deal of insight was uncovered about the perceived values of the agency. While it is important to know and adhere to these values in an operational way, it is equally important to understand the impact and importance of the agency's *perceived* values from the vantage point of its stakeholders. In retreat, the core values were developed as a result of an in-depth review and discussion on the AWBS values as perceived by its stakeholders, as well as the values the Board and senior leaders wished to espouse in the future.

Strengths/Weaknesses/Opportunities/Threats

The following section outlines AWBS's most significant strengths and weaknesses as identified by stakeholders and retreat participants as well as the opportunities and threats that exist in the environment. This introspective exercise becomes most valuable when strengths are showcased and maximized to take advantage of the opportunities that are available, and when weaknesses are minimized and contingency plans developed to handle threats should they arise. (**Bolded** items prioritized by participants.)

STRENGTHS:

Maximize and showcase

Strong leadership

Integrated services

Collaboration

Certification and accreditation

Diversity (board/programs/staff/clients)

Defined expectations

Flexible leadership

Multiple sites

Staff and staff dedication

Long-term funded grants

Integrity

Agency longevity/resilience

Offers transportation

Operational processes/audit preparedness

WEAKNESSES:

Minimize impact while leveraging external relationships to create a communal strength

Process inefficiency/lagging technology

Insufficient contracts with funders

Financial instability/lack of fund development

Lack of credentialed staff

Physical plant(s) lacking

Lack of outcome measurements

AG case still open

Staff benefits lacking

Cumbersome paperwork

Some staff not accountable

Accounts payable/small amounts not paid

Wasted time/low productivity

Staff need training

Lack of marketing

Low volume of consumers, particularly at Field Street location

Unclear and inconsistent communication with staff

Salary non-competitiveness

New performance appraisal tool (unclear how to use)

Staff to consumer ratio

Lack of functioning board committees

Lack of sufficient qualified Board members

OPPORTUNITIES:

Position AWBS to take advantage of

Rebranding/marketing

Expansion of services

Increase and diversify revenue

Expand partnerships and collaborations

Fortify Board of Directors

Implement new programs and services

Expand service array, such as SBIRT, children MH services, jail diversion agreements, strengthening families program

Utilization of student nurse practitioners

Purchase real estate

Absorb persons served from other CMH agency; merging with other agency

THREATS:

Anticipate and prepare for by developing contingency plans

Loss of Funding

Loss of credentialing/accreditation

Loss of facility due to aging

System change – Rebidding MCPNs or impact of Section 298 of the Governor’s budget

Outdated technology

Lack of advocacy on behalf of CMH agencies

Loss of persons served

Medicaid cuts

High staff turnover

Competition from Primary Care Providers (PCPs), other CMHs

Financing challenges

Negative publicity

Change in funding regulations/billing requirements

Old vehicles

Strategic Imperatives

The following is the Consultant's recommendation of the seven strategic imperatives which should receive AWBS' attention and efforts over the three years in order to create an effective and sustainable organization. These imperatives were determined by considering how best to advance the agency by either: maximizing and showcasing AWBS strengths while taking advantage of and leveraging opportunities *or* minimizing the impact of (or otherwise addressing) weaknesses and mitigating or preparing for the potential threats. Their selection is further supported by balancing the highest priority, highest potential for impact and the ease of implementation. As the tactical timeline is developed, multiple strategic imperatives will be advanced simultaneously.

- Financial stability and sustainability
- Engaged, well-trained, appropriately positioned staff
- High performing IT infrastructure
- Culture of Excellence and Continuous Quality Improvement
- Efficient, high-quality service delivery
- Effective, well-developed governance
- Collective advocacy and activism

Definitions: Strategic Imperatives, Objectives, and Tactics

For ease of digesting the Strategic Imperatives matrices (at end of document), the following definitions are offered:

- Strategic Imperatives – AWBS' broad primary outcomes, linked directly to the agency's mission, towards which effort and actions are directed.
- Objectives – measurable and specific sub-goals to address the strategic imperatives
- Tactics - specific set(s) of actions or tools necessary to attain the objective

Additional Recommendations

In addition to the objectives and tactics outlined in the matrices, two additional recommendations are included to support the advancement of AWBS's vision and mission:

Showcase Strength of AWBS' Expertise and its Executive and Governance Leadership

- Increase visibility of leadership staff and governance through external communication and community educational opportunities
- Increase frequency of expert communication from AWBS Executive to community and peers

AWBS Re-branding Campaign

- Leverage strong agency legacy with a complete re-branding campaign, which would include an update of the logo, formal announcement of name change, unveiling of the strategic plan, and a robust and comprehensive educational campaign on the wide-ranging nature of AWBS' service and program offerings

Successes and Success Factors

It is important to be reminded of the **sixty-five years** of successes which AWBS has enjoyed as the Agency embarks upon its next three years. Further, it behooves the organization to consider the organizational characteristics and assets employed to enact those successes, so they may be re-enlisted for future use. Leadership should be intentional about reviewing, considering and reinforcing the characteristics/assets that supported past successes with key staff, and otherwise create opportunities for learning and reinforcing these skills and behaviors.

<u>Successes</u>	<u>Success Factors (Characteristics/Assets)</u>
Dedicated, long-term staff	Flexible/open leadership Staff empowerment Effective recruitment and retention practices
Financially sound	Effective financial management practices
Increase in volume of persons served	Wide range of service offerings High engagement of persons served
Sustainability in spite of legal/financial issues	Financial creativity Engaged management and Board
Crain's recognition – Best Managed Non-profit (2009)	Strong management team
Care Transitions Program	Visionary thinking Evidence based
Board Members' Dedication	Effective recruitment and retention practices Mission-alignment
Diversity of funding sources	Grant writing expertise Collaboration Innovative thinking
Continuous CARF accreditation	Effective policies Board and staff engagement Quality of services provided Documentation Technical knowledge Organizational Skills
Effective, comprehensive programs and services	Visionary thinking Technical expertise and knowledge Partnerships and collaborations
Securing of federal grants	Effective grant writing Research Organizational skills

Diversified funding sources	Research Program evaluation Solid reputation in the community
Financial turnaround	Discipline Strong CFO Innovative thinking
Strong partnerships and collaborations	Networking Effective Memoranda of Understanding (MOUs)
Agency Longevity	Staff and Board commitment Adaptability Strong performance management Sound financial decisions

Assets

A key determinant of ABWS’ success is the effective and appropriate use of Agency assets. As part of the strategic planning retreat, participants were surveyed against the success factors they had developed in reviewing the agency’s many successes over the years. Those assets – and the Board/senior leaders that possess them – are delineated in asset matrix included with this document.

All Well-Being Services Strategic Plan Matrix – Four Year View

	YEAR ONE	YEAR TWO	YEARS THREE & FOUR
STRATEGIC IMPERATIVES			
Financial Stability & Sustainability	<ul style="list-style-type: none"> • Develop and implement a fund development plan • Increase number of service-based contracts with current funders • Diversify revenue streams and funders 	<ul style="list-style-type: none"> • Create contingency plan for potential CMH changes and loss of traditional funding streams 	<ul style="list-style-type: none"> • Maximize and showcase integrated services
Engaged/Trained/Appropriately Positioned Staff	<ul style="list-style-type: none"> • Assess all staff and positions against credentialing requirements • Conduct comprehensive internal assessment of current systems by department and staff level 	<ul style="list-style-type: none"> • Strategically position key staff in mutually beneficial collaborations and partnerships throughout SE Michigan 	<ul style="list-style-type: none"> • Maximize and showcase strong leadership and staff
High performing IT Infrastructure	<ul style="list-style-type: none"> • Commission an external IT assessment of system capacity and capability • Conduct an agency-wide process review/assessment and re-engineering project 	<ul style="list-style-type: none"> • Create and release an RFP for new IT infrastructure system(s) • Develop and maintain (or identify and join) an IT collaborative group with similarly situated organizations 	<ul style="list-style-type: none"> • Monetize agency's IT infrastructure to support smaller agencies
Culture of Excellence/CQI	<ul style="list-style-type: none"> • Maximize and showcase all current accreditations and certifications • Conduct an agency-wide process review/assessment and re-engineering project 	<ul style="list-style-type: none"> • Identify and secure quality/accreditation-focused professional(s) for Board service 	<ul style="list-style-type: none"> • Seek out and submit for quality awards, showcases, etc. to highlight agency's COE/CQI accomplishments

Efficient/High quality Service Delivery	<ul style="list-style-type: none"> Assess all staff/all positions against credentialing requirements Create re-branding and public awareness campaign that highlights agency's diversity of services and service delivery 	<ul style="list-style-type: none"> Conduct community needs assessment to determine the scope and breadth of service/program needs in the agency's catchment area(s) Commission a facilities study to determine the optimal use and longevity of agency's real estate 	<ul style="list-style-type: none"> Align agency's service offerings with results of community needs assessment
Effective/Well-developed Governance Body	<ul style="list-style-type: none"> Conduct a governance self-assessment Conduct a governance process review/assessment and re-engineering project Review and update Board Bylaws 	<ul style="list-style-type: none"> Create and implement public awareness campaign that highlights agency's strength and diversity in Board leadership 	<ul style="list-style-type: none"> Seek out and participate in state and nationwide Board development activities
Collective Advocacy & Activism	<ul style="list-style-type: none"> Hire/contract advocacy/government relations professional Push for the creation of an advocacy and activism platform and agenda in conjunction with provider collaborative 	<ul style="list-style-type: none"> Identify/purchase system that provides timely advocacy updates/calls to action Strengthen advocacy-specific collaborative efforts 	<ul style="list-style-type: none"> Identify and secure advocacy professional for Board service

All Well-Being Services Strategic Plan Matrix – Year One

Strategic Imperative	Objective	Tactic	Timeline	Champion(s)
Financial Stability & Sustainability	<ul style="list-style-type: none"> • Develop and implement a fund development plan • Increase number of service-based contracts with current funders • Diversify revenue streams and funders 	<ul style="list-style-type: none"> • Contract vendor/direct current staff to develop • Review current contracts; identify gaps; engage funders • Research potential funders; develop solicitation plan 	<ul style="list-style-type: none"> • June – July, 2018 • June – July, 2018 • June – August, 2018 	<ul style="list-style-type: none"> • CFO/FD Chair • Programs • Intern
Engaged/Trained/Appropriately Positioned Staff	<ul style="list-style-type: none"> • Assess all staff and positions against credentialing requirements • Conduct comprehensive internal assessment of current systems by department and staff level 	<ul style="list-style-type: none"> • Secure credentialing requirements for all current and potential funders • Identify project lead, develop project plan for full assessment 	<ul style="list-style-type: none"> • June – August, 2018 • June – Sept, 2018 	<ul style="list-style-type: none"> • HR • HR/IT/FIN
High performing IT Infrastructure	<ul style="list-style-type: none"> • Commission an external IT assessment of system capacity and capability • Conduct an agency-wide process review/assessment and re-engineering project 	<ul style="list-style-type: none"> • Issue RFP for assessment project; select vendor • Identify project lead, develop project plan for full assessment 	<ul style="list-style-type: none"> • June – Sept, 2018 • June, 2017 – Feb, 2019 	<ul style="list-style-type: none"> • IT/FIN • COO
Culture of Excellence/CQI	<ul style="list-style-type: none"> • Maximize and showcase all current accreditations and certifications • Conduct an agency-wide process review/assessment and re-engineering project 	<ul style="list-style-type: none"> • Incorporate into agency-wide Rebranding /Public Awareness campaign • Identify project lead, develop project plan for full assessment 	<ul style="list-style-type: none"> • June – Sept, 2018 • June, 2017 – Feb, 2019 	<ul style="list-style-type: none"> • CEO/Chair • COO

Efficient/High quality Service Delivery	<ul style="list-style-type: none"> Assess all staff and positions against credentialing requirements Create re-branding and public awareness campaign that highlights agency's diversity of services and service delivery 	<ul style="list-style-type: none"> Secure credentialing requirements for all current and potential funders Issue RFP/identify vendor 	<ul style="list-style-type: none"> June – August, 2018 June – Sept, 2018 	<ul style="list-style-type: none"> HR CEO/Chair
Effective/Well-developed Governance Body	<ul style="list-style-type: none"> Conduct a governance self-assessment Conduct a governance process review/assessment and re-engineering project Review and update Board Bylaws 	<ul style="list-style-type: none"> Secure and implement assessment tool(s) Develop project plan; secure project lead Review best-practice bylaws; recommend revisions 	<ul style="list-style-type: none"> June, 2018 June – Dec, 2018 June – July, 2018 	<ul style="list-style-type: none"> Chair/CEO Chair/CEO Bylaws Committee
Collective Advocacy & Activism	<ul style="list-style-type: none"> Hire/contract advocacy/government relations professional Push for the creation of an advocacy and activism platform and agenda in conjunction with provider collaborative 	<ul style="list-style-type: none"> Issue RFP or post to identify appropriate professional Assess current stage of advocacy with collaborative 	<ul style="list-style-type: none"> June – August June, 2018 	<ul style="list-style-type: none"> CEO CEO

All Well-Being Services Strategic Plan Matrix – Year Two

Strategic Imperative	Objective	Tactic	Timeline	Champion(s)
Financial Stability & Sustainability	<ul style="list-style-type: none"> • Create contingency plan for potential CMH changes and loss of traditional funding streams 	<ul style="list-style-type: none"> • Charge advocacy/gov't relations staff with developing position paper 	<ul style="list-style-type: none"> • 90 days 	<ul style="list-style-type: none"> • CEO
Engaged/Trained/Appropriately Positioned Staff	<ul style="list-style-type: none"> • Strategically position key staff in mutually beneficial collaborations and partnerships throughout SE Michigan 	<ul style="list-style-type: none"> • Identify potential partners 	<ul style="list-style-type: none"> • 60 days 	<ul style="list-style-type: none"> • COO
High performing IT Infrastructure	<ul style="list-style-type: none"> • Create and release an RFP for new IT infrastructure system(s) • Develop and maintain (or identify and join) an IT collaborative group with similarly situated organizations 	<ul style="list-style-type: none"> • Assess satisfaction with peer systems and vendors to determine RFP recipients; create project timeline • Identify partner organizations 	<ul style="list-style-type: none"> • 90 days • 30 days 	<ul style="list-style-type: none"> • IT/CFO • IT/CFO
Culture of Excellence/CQI	<ul style="list-style-type: none"> • Identify and secure quality/accreditation-focused professional(s) for Board service 	<ul style="list-style-type: none"> • Research and source for professional(s); present Board member responsibilities and expectations 	<ul style="list-style-type: none"> • 90 days 	<ul style="list-style-type: none"> • Chair/CEO
Efficient/High quality Service Delivery	<ul style="list-style-type: none"> • Conduct community needs assessment to determine the scope and breadth of service/program needs in the agency's catchment area(s) • Commission a facilities study to determine the optimal use and longevity of agency's real estate 	<ul style="list-style-type: none"> • Identify and secure project lead; charge with assessment task • Identify and secure vendor 	<ul style="list-style-type: none"> • 4 – 6 months • 90 days 	<ul style="list-style-type: none"> • Programs • COO

Effective/Well-developed Governance Body	<ul style="list-style-type: none"> • Create and implement public awareness campaign that highlights agency's strength and diversity in Board leadership 	<ul style="list-style-type: none"> • Enact subsection of Agency-wide Rebranding/Public Awareness campaign 	<ul style="list-style-type: none"> • 120 – 180 days 	<ul style="list-style-type: none"> • CEO/Chair
Collective Advocacy & Activism	<ul style="list-style-type: none"> • Identify/purchase system that provides timely advocacy updates/calls to action • Strengthen advocacy-specific collaborative efforts 	<ul style="list-style-type: none"> • Resource/source tool and/or vendor • Offer Agency as topical expert/accountability partner for Collaborative in this effort 	<ul style="list-style-type: none"> • 90 days • Ongoing 	<ul style="list-style-type: none"> • IT/CFO • CEO/COO

All Well-Being Services Strategic Plan Matrix – Years Three & Four

Strategic Imperative	Objective	Tactic	Timeline	Champion(s)
Financial Stability & Sustainability	<ul style="list-style-type: none"> Maximize and showcase integrated services 	<ul style="list-style-type: none"> Enact subsection of Agency-wide Rebranding/Public Awareness campaign 	<ul style="list-style-type: none"> 90 days 	<ul style="list-style-type: none"> Programs/CEO
Engaged/Trained/Appropriately Positioned Staff	<ul style="list-style-type: none"> Maximize and showcase strong leadership and staff 	<ul style="list-style-type: none"> Enact subsection of Agency-wide Rebranding/Public Awareness campaign 	<ul style="list-style-type: none"> 90 days 	<ul style="list-style-type: none"> HR/CEO
High performing IT Infrastructure	<ul style="list-style-type: none"> Monetize agency's IT infrastructure to support smaller agencies 	<ul style="list-style-type: none"> Identify potential customers and create/market value proposition 	<ul style="list-style-type: none"> 120 days 	<ul style="list-style-type: none"> IT/CFO
Culture of Excellence/CQI	<ul style="list-style-type: none"> Seek out and submit for quality awards, showcases, etc. to highlight agency's COE/CQI accomplishments 	<ul style="list-style-type: none"> Research and identify targets 	<ul style="list-style-type: none"> Ongoing/1 year (cycle) 	<ul style="list-style-type: none"> CEO/COO
Efficient/High quality Service Delivery	<ul style="list-style-type: none"> Align agency's service offerings with results of community needs assessment 	<ul style="list-style-type: none"> Add, expand or sunset services according to CNA results 	<ul style="list-style-type: none"> 6 months 	<ul style="list-style-type: none"> Programs/COO
Effective/Well-developed Governance Body	<ul style="list-style-type: none"> Seek out and participate in state and nationwide Board development activities 	<ul style="list-style-type: none"> Research and identify targets 	<ul style="list-style-type: none"> Ongoing/1 year (cycle) 	<ul style="list-style-type: none"> Chair/CEO
Collective Advocacy & Activism	<ul style="list-style-type: none"> Identify and secure advocacy professional for Board service 	<ul style="list-style-type: none"> Research and source for professional(s); present Board member responsibilities and expectations 	<ul style="list-style-type: none"> 90 days 	<ul style="list-style-type: none"> Chair/CEO