Integrated Strategic Plan



Fiscal Year
2025 - 2028

Crossroads Community
Behavioral Health Recovery

CORSICA RIVER
Mental Health Services

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Table of Contents

3
Background & Context

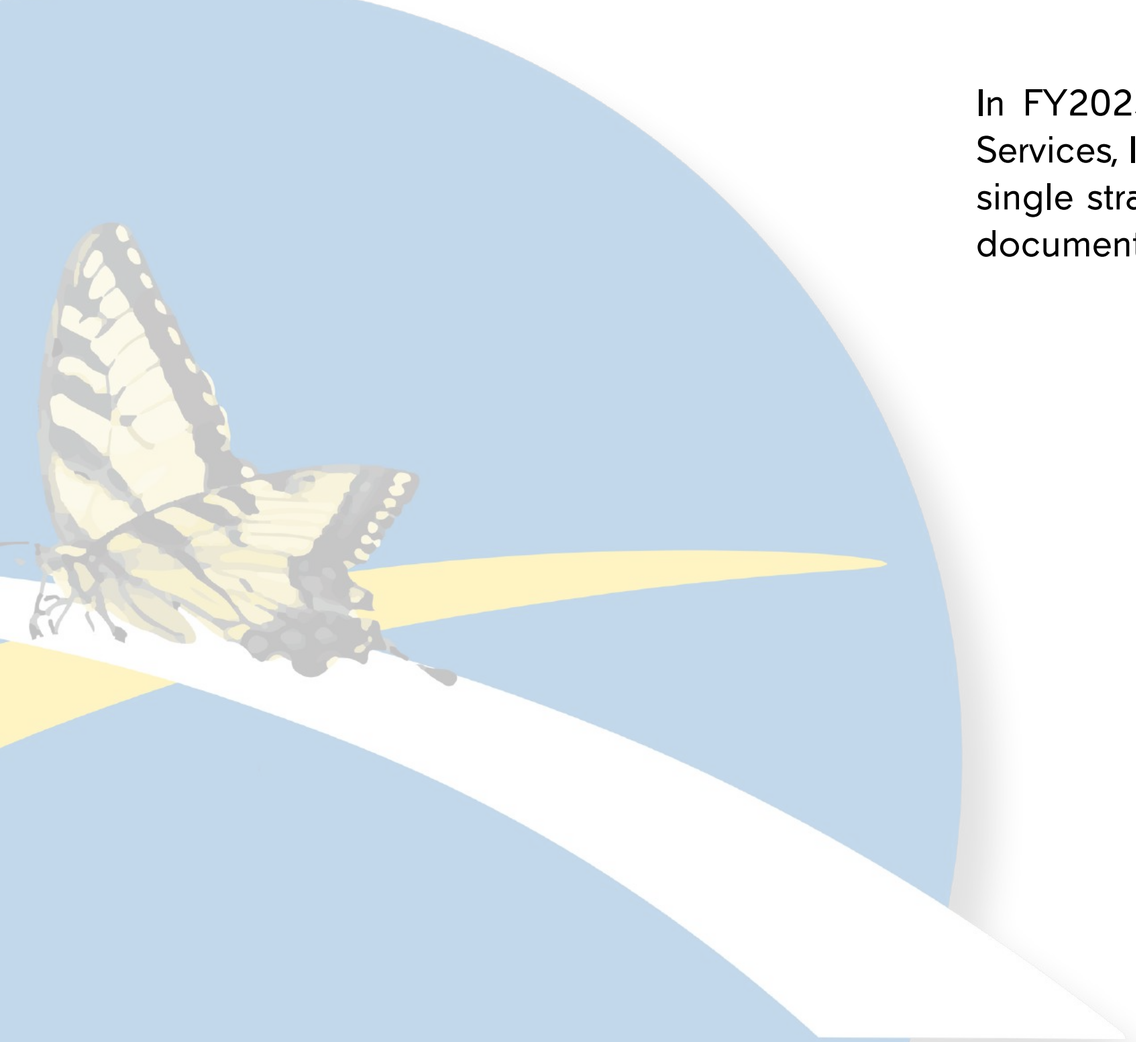
4 - 6
Strategic Planning Committee & Process

7
Mission & Values

8 - 17
Strategic Priorities

18
Driving & Restraining Forces

19
End Slide



In FY2023, the Boards of Crossroads Community Inc, and Corsica River Mental Health Services, Inc. initiated an effort to integrate the strategic plans for both agencies, into one single strategic planning process to guide the organizations for the next three years. This document explains the process and the plan, and sets a course to move ahead.

Background and Context

Following an extensive search process, the consultant team of Ann Quinn of Quinn Strategies, and Margaret Wilson of Tandem Partners, lead us through an integrated strategic planning process.

In the two years since the Executive Director succession from John Plaskon to Holly Ireland, it became apparent that there was considerable overlap between the separate, agency specific strategic plans, and the existing priorities did not align with the needs identified in the recent SWOT analyses.

Additionally, there is movement towards mergers and acquisitions in the health care sector at both national and state levels. The growing expectation of measurement based care in preparation for value-based, population health payment systems was another motivating factor. Models endorsed by SAMHSA such as the CCBHC require nine components of care, eight of which are currently offered, some by CCI and others by CRMHS. Together, the agencies will be well positioned to adapt to future health care financing structures.

Historically, CRMHS was established as a separate agency, due to the potential for financial loss and instability. With increased reimbursement rates, and clinical services efficiencies, CRMHS had made significant strides in financial stability and assets.

Strategic Planning Committee and Process

Strategic Planning Committee





Board Members
Susan Banks, CCI
Linda Carroll, CRMHS
Julie Hickey, CCI



United Leadership Team (ULT) Members
Paula Turner, CRMHS Clinical Director
Katie Schoonover, CRMHS and CCI Finance and Admin Director
Holly Ireland, CRMHS & CCI Executive Director
Kelsey Horney, CRMHS & CCI Human Resources Director
Kara Morris, CCI Program Director

Strategic Planning Committee and Process

Over the course of seven months, the organization worked collaboratively to create the strategic plan. This plan was led by the senior leadership team with three board members serving on the committee. The board was involved at key touchpoints to provide input, agree on goals and priorities, and finalize the plan. The following process ensured a robust, inclusive strategic planning process:

August 2023

Kickoff Meeting

- Surface the themes and questions facing the organization
- Determine which stakeholders to include and what questions to ask
- Discussed mission, vision and values
- Inventory of current resources

September 2023

Stakeholder Engagement

- 10 external stakeholder interviews (partners, peer organizations)
- Board survey
- Staff survey

October 2023

Planning Retreat

- Senior Leadership and board members participated in a visioning retreat
- Completed a Context Map to understand external landscape – attached in Appendix
- Completed a SPOT Analysis – attached in Appendix

Strategic Planning Committee and Process

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November 2023

Strategic Priorities & Objectives

- Strategic planning committee confirmed the strategic priorities and objectives needed to achieve 3-year vision
- Board session to share priorities and objectives and get input and feedback

January 2024

Implementation Planning

- Senior leadership team identified the strategies needed to achieve objectives
- Create Year One implementation Plan
- Set outcome measures for priorities

February 2024

Finalize Plan & Board Approval

- Executive Director drafted strategic plan with consultant
- Strategic planning committee reviewed and provide input
- Boards approved the plan at February board meeting

Mission, Vision & Values

Mission

The mission of Crossroads Community, Inc. is to teach skills and access resources that empower individuals with behavioral health needs to recover and live satisfying and productive lives. Crossroads promotes community acceptance through advocacy and community education.

Vision

Crossroads Community envisions a community where people with behavioral health needs recover and are treated with dignity, respect and equality.

Values

We believe in delivering quality services through effective leadership and empowered professional teams who are focused on meeting the needs of our customers.

Mission

To provide caring, effective and highly accessible mental health and substance use disorder treatment through our clinics.

Vision

Our vision is that all persons served will realize their inherent resiliency to successfully cope with life's challenges.

Values

We value performing as a client-centered, solution-focused, outcome oriented team.

Strategic Priorities





Evaluate and Continuously Enhance Services



Define and Communicate Our Brand

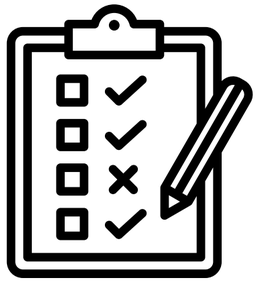


Integrate the Operational Model

Evaluate and Continuously Enhance Services



Rationale: A commitment to providing high quality services and service enhancements is true to our missions and legacy. Our agencies were born out of community need. We provide high quality service, and we strive to continuously improving and keeping pace with behavioral health care innovation. This priority encourages us to see our clients holistically and respond with services that the community needs. Focusing on service enhancement ties to financial sustainability because it allows us to maximize our census and billing. Enhancing services opens us up to alternate funding sources and attracts and retains a highly qualified and trained staff. We strive to provide a full continuum of services and supports for social determinates of health.



Evaluate and Continuously Enhance Services

Objective A

Comprehensively train staff in evidence-based practices

Strategies

1. Develop evidence-based practices training plan for all staff.
2. Train staff to become trainers for our team.
3. Seek, provide and support opportunities for staff to gain professional certifications.
4. Offer preceptorships for students to build a recruiting pipeline.
5. Maintain Supported-Employment Evidence-Based Practice enhanced rates.
6. Achieve ACT fidelity and earn enhanced EBP rates.

Budget Implications and Considerations

- Additional position - salary and fringe
- Additional professional certifications - increased salary and fringe
- Ensure adequate professional development funding and inclusive access for staff.
- Increase revenue through EBP rates

Objective B

Ensure adequate facilities and space for service delivery

Strategies

1. Secure funding to expand and improve facilities.
2. Build new Cambridge location on existing owned property.
3. Develop and implement a safety and security plan for all facilities.
4. Explore opportunities to bring partners into our spaces to co-locate.

Budget Implications and Considerations

- Consider capital campaign
- Contractual grant writer costs
- Ongoing costs of safety and security systems
- Increase in facilities operational costs

Objective C

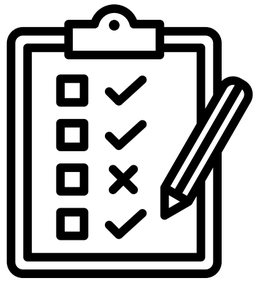
Evaluate community needs and service mix to respond to evolving needs

Strategies

1. Utilize existing community needs assessments to help inform our services quality, quantity and type.
2. Review our services and use data and trends to adjust and evolve our service array.
3. Expand existing service volumes and maximize access.

Budget Implications and Considerations

- Ensuring aligned staffing resources with productivity, expenses with income
- Grant availability (local, state, federal and private) for start-up and on-going cost leveraging



Evaluate and Continuously Enhance Services

Objective A

Comprehensively train staff in evidence-based practices

Year One implementation

- Hire a training coordinator
- Evaluate feasibility of becoming a BSWE CEU provider; submit application if indicated
- Complete a train the trainer program in one evidence-based practice (e.g., motivational interviewing)
- Develop an implementation plan to train all staff in one EBP (MI)
- 10% of staff will gain professional certification/licensure

Lead: Executive Director

Objective B

Ensure adequate facilities and space for service delivery

Year One implementation

- Work with a grant writer to identify potential funding sources for new buildings
- Create a move plan to shift administrative services to accommodate clinical services
- Update our safety and security plan annually to prioritize and budget
- Review safety and security plan to differentiate between maintenance and upgrades
- Designate an organization safety officer and define position and role

Lead: Administrative Director

Objective C

Evaluate community needs and service mix to respond to evolving needs

Year One implementation

- Review and analyze existing needs assessments to determine what service needs are aligned with our mission
- Determine how to respond to the expressed needs of the community
- Redevelop and relaunch our child and adolescent services
- Conduct a program review using clear criteria aligned with mission and financial goals.
- Establish productivity expectations for programs, teams, and individual staff members

Lead: Clinical Director; Program Director

Define and Communicate Our Brand



Rationale: We have an opportunity to build awareness and recognition in the communities in which we operate. To grow and thrive we need to tell our story to increase name recognition and knowledge of our services. Telling a compelling story about our organization allows us to service clients, position as a top referral partner and attract and retain our employees.



Define and Communicate Our Brand

Objective A

Rebrand and Promote the Agency for the future

Strategies

1. Define and operate as an unified agency.
2. Hire outside expertise to define and navigate a rebranding process.
3. Include internal operations and consider staff perspectives in the brand/identity discussion.
4. Intentionally shape and influence our culture as we integrate the two organizations.

Budget Implications and Considerations

- Ensure adequate marketing budget
- Ensure existing agencies DBA a unified agency until all program and site licenses and NPI numbers are updated and transferred to new agency entity

Objective B

Align and leverage partnerships to deliver mission

Strategies

1. Communicate with county and local governments and stakeholders to discuss our services and capabilities.
2. Develop and implement a plan to market and promote our work with youth to re-educate key members of the youth-serving system.
3. Create a partner plan and responsible person to ensure the Agency stays top of mind.

Budget Implications and Considerations

- Possible increased funding from Counties investments
- Increase sponsorship of events to cover expenses

Objective C

Become an Employer of Choice

Strategies

1. Define the agency culture and values and the type of employee that you want to attract and retain.
2. Become a HRSA site to attract and retain high quality staff.
3. Become a field site with schools of social work and nursing to attract a pipeline of potential employees.
4. Complete salary survey and update salary scale on an annualized basis to ensure competitive salaries in a limited workforce environment
5. Develop a productivity-based compensation structure that allows staff to grow their income while also growing the agencies.

Budget Implications and Considerations

- Phase increases to salary and fringe budget line it to move to a competitive salary scale
- Increase revenue with compensation incentives
- Cost of any proprietary assessment tool used



Define and Communicate Our Brand

Objective A

Rebrand and promote the Agency for the future

Year One implementation

- Update our marketing plan to addresses and define new identity by June 2024.
  - New digital branding (name, logo, mission, vision, values, style guide, etc.)
- Create and implement a plan for staff to engage with the new brand and identity.

Lead: Executive Director

Objective B

Align and leverage partnerships to deliver mission

Year One implementation

- Visit each county government and commission to solidify our relationship.
- Create presentation materials and do a roadshow on our team and services.
- Identify all partner agencies in the region.
- Assign a partner lead and schedule meetings to build awareness and connection.

Lead: Executive Director

Objective C

Become an Employer of Choice

Year One implementation

- Update and continue to implement the Recruitment and Retention Plan annually.
- Assess gaps and prioritize opportunities to understand what engages our staff and revise our recruitment and retention plan to reflect our findings.
- Survey prospective job seekers to understand how the Agency is perceived in the market.
- Develop a plan to move staff to market compensation levels.
- Use an employee survey tool (Gallup 12) to measure employee engagement.

Lead: Executive Director; HR Director

Integrate the Operational Model



Rationale: We were originally set up as two organizations to protect the assets of the original organization from the risk of launching a startup. This model no longer serves the organization or our clients. We recognize that becoming one agency, one mission, one vision and one board is critical for future success. Streamlining our internal systems and operations will allow us to achieve efficiencies. Achieving an integrated operational model by June 2027 will allow us to present a unified external presence and better coordinated care for the community and our referral sources.

Integrate the Operational Model

Objective A

Integrate systems, policies and procedures for efficiency

Strategies

1. Evaluate the policies crosswalk to align and adopt a set of unified policies in compliance with national accreditation standards.
2. Look at HR policies to adopt one set of policies and guidelines.
3. Consolidate our accounting systems.

Budget Implications and Considerations

- Fiscal note of any policy changes
- Possible cost savings by streamlining accounting systems.

Objective B

Integrate the organization culture while maintaining quality standards

Strategies

1. Enhance communication channels and meetings to integrate the staff as one.
2. Reflect the internal integration in our social media, website and other external communication platforms.
3. Maintain ongoing national accreditation and licensure of programs.
4. Develop a team-based, collaborative care environment to meet client's needs aligned with staff capacity.

Budget Implications and Considerations

- Possible cost savings related to single agency accreditation.
- Implementation of One Team approach agency-wide, cost associated with staff hours and materials.

Objective C

Integrate the boards and build capacity to support the Agency

Strategies

1. Consolidate the two boards of directors into one board to guide the integrated agency.
2. Identify skills, expertise, competencies, and networks for board members and use as a recruitment tool.
3. Build board capacity to enhance their ability to help with fundraising, stakeholder development and strategy.

Budget Implications and Considerations

- Increased Financial Support from our board members.
- Costs associated with board development and integration activities.

Integrate the Operational Model

Objective A

Integrate systems, policies and procedures for efficiency

Year One implementation

- Review and revise all policies and procedures that reflect the new integrating identity.
- Implement a single EHR in 2024.
  - Integrate Greenspace Single Sign-on
  - Integrate CRISP into EHR
- Investigate a single accounting system that can create automated monthly, quarterly and annual reporting.

Lead: HR Director; Finance Director

Objective B

Integrate the organization culture while maintaining quality standards

Year One implementation

- Map out workflows to understand how operations work, and could be improved.
- Standardize and strengthen use of technology tools to drive efficiencies and collaboration.
- Strengthen information technology reliability.
- National accreditation for CCI.
- Use data to drive decision making at all levels of service.

Lead: Executive Director; HR Director

Objective C

Integrate the boards and build capacity to support the Agency

Year One implementation

- Revise the bylaws and other governance structures and practices to reflect one board.
- As part of rebranding, develop new mission and vision statements.
- Work with the two board presidents to integrate the boards.
- Board development committee to plan a development training to build capacity on the board.

Lead: Executive Director

Driving Forces & Supports

- One Team Holly grounds us back in this team approach
- Team buy-in
- Desire to provide quality services and create a great experience for employees
- Ultimate outcome for our clients and the betterment of our community
- Commitment to quality; healthy work environment; strong recovery community

Restraining Forces & Challenges

- Too many initiatives, not enough bandwidth, What's already on our plate
- Money to follow through on the initiatives
- A mindset that the strategic plan disrupts business
- Organizational (the collective) Innate Fear of Change
- Financial limitations and consideration; Demand for growth
- Expressing our needs and priorities
- Poverty mentality and risk aversion

Thank You.



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