



Community • Independence • Empowerment



**INTEGRATED SERVICES OF KALAMAZOO  
BOARD RETREAT PRESENTATION**

# Welcome



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# Agenda



1

Landscape Review

2

Strategic Planning Team and Strategic Planning Process

3

Strategic Planning Model

4

SWOT Analysis

5

Strategic Plan Review

# External Landscape: State & Federal

High Demand & Limited Access

Workforce Shortages

Conflict Free Access & Planning

Technology & Health Information Exchange

Mergers & Acquisitions

Special Needs Plans for managing complex populations

Integrated Care Models

Rates, Admin Burden, New Requirements



# Strategic Planning Team

Amy Rottman

Ashley Esterline

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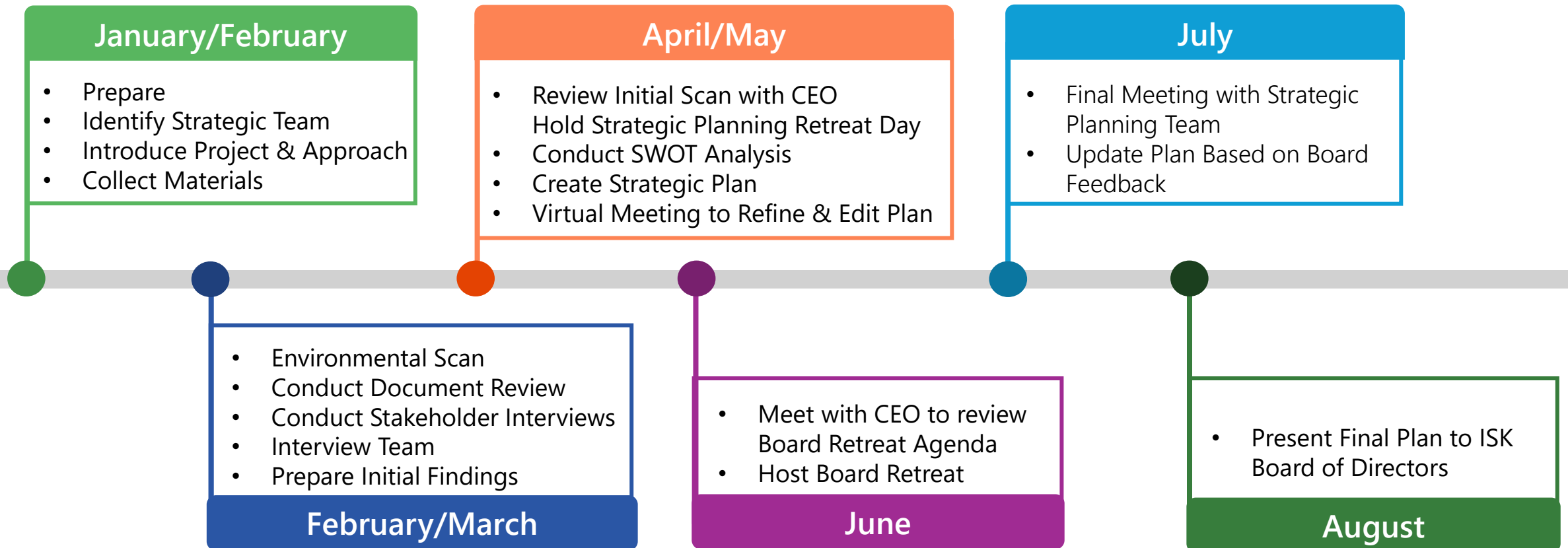
Nancy McDonald

Sheila Hibbs

Wanda Brown



# Timeline of Strategic Planning Process





# TBD Model of Strategic Planning

**Mission:** We promote and provide mental health, intellectual disability, and substance use disorder resources that empower people to succeed.

**Vision:** We provide a welcoming & diverse community partnership which collaborates and share effective resources that support individuals and families to be successful through all phases of life.

We Value...



Community

Diversity

Recovery

Focus Area A

Focus Area B

Focus Area C

Goal

Goal

Goal

KPI

Objective

KPI

Objective

KPI

Objective



**Mission:** We promote and provide mental health, intellectual disability, and substance use disorder resources that empower people to succeed.

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We Will...



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We Are...

Focus Area A

Focus Area B

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We Will...

Goal

Goal

Goal

We will know  
we are  
successful  
when...

KPI

Objective

KPI

Objective

KPI

Objective

We use... to get it done

Mission: We promote and provide mental health, intellectual disability, and substance use disorder resources that empower people to succeed.

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Goal

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We will know we are successful when...

KPI

Objective

KPI

Objective

KPI

Objective

# Stakeholder Interviews



Determine  
Goals



Identify  
Stakeholders



Prepare  
Questions



Document and  
Analyze

# Environmental Scan

Expectations and  
Needs of Persons  
Served

Expectations and  
Feedback from  
Staff

Community  
Needs

Regulatory &  
Legislative

Programs and  
Service Initiatives

Competitive  
Environment

Finance

Capital  
Resources/  
Management

Human Resources

Technology

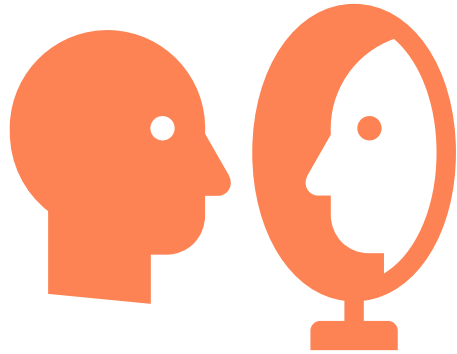
Training and  
Evidence-Based  
Practices

Relationships  
with External  
Stakeholders

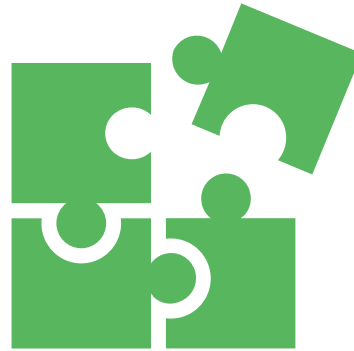
Community  
Awareness and  
Perception

Other Areas as  
Identified by ISK

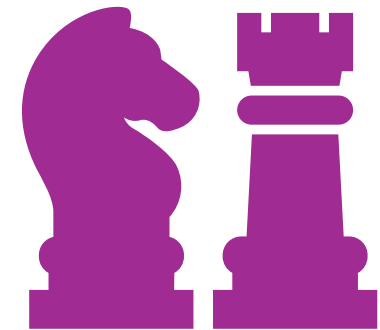
# Three Purposes



**Hold Up the  
Mirror**



**Discuss Gaps/Missing  
Pieces**

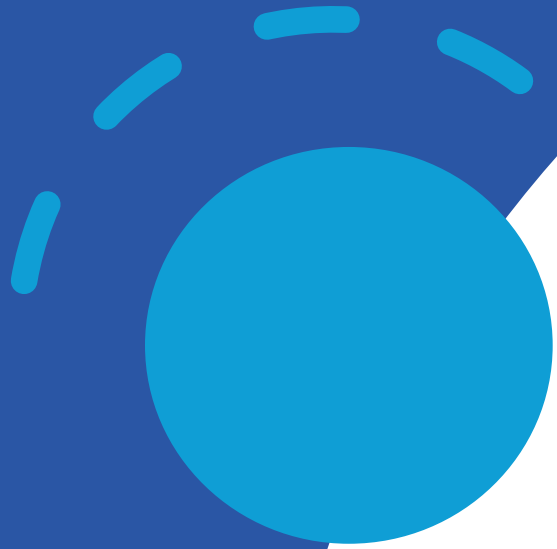


**Formulate  
Strategy**

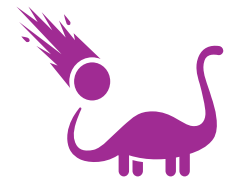
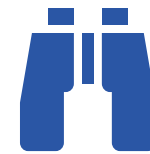
# SWOT Analysis

	Helpful	Harmful
Internal	<b>Strengths</b> 	<b>Weaknesses</b> 
External	<b>Opportunities</b> 	<b>Threats</b> 





# Team SWOT Analysis Themes



# Strengths



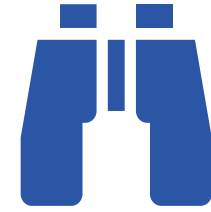
- Commitment to consistent focus on consumers served
- Comprehensive Array of services (Addition of Crisis services)
- Strong and supportive team
- Excellent Reputation with community organizations
- Strong financial position
- Robust provider network
- Adoption of new Electronic Medical Record

# Weaknesses



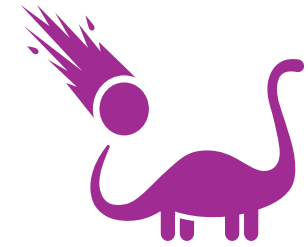
- Communication
- Administrative Burden and paperwork compliance
- Funding and resources
- Operational Challenges
- Physical Space Challenges
- Meeting Redundancy
- Mastery of internal and external changes

# Opportunities



- Leadership and Planning
- Workforce development and retention strategies
- Change Management strategies
- Increasing IT capabilities and simplifying processes through standardization and consolidation
- Community engagement and growth. Engaging underserved communities and addressing stigma through education
- Identifying opportunities for financial growth and cost analysis
- Advocacy

# Threats



- Political changes affecting the mental health system
- Financing uncertainties and long-term Medicaid structural deficits
- Over-regulation causing administrative inefficiencies
- Potential bifurcations of the system (CCBHC and non-CCBHC) funding fluctuations
- Provider network funding and workforce issues
- Workforce issues
- System identity crisis / lack of vision for public behavioral health system

# Assets

**Observation**

**Stakeholder Feedback**

# Asset #1

## Relationships with External Stakeholders



ISK has **excellent relationships** with **community stakeholders**.



*"ISK staff are responsive! They are always willing to assist, and they always seem to have a plan! We love the new urgent care!"*

# Asset #2

## ISK Employees



ISK Employees are invested in the mission, and community stakeholders view them as competent, caring, and person centered minded.



*"ISK Employees are responsive, consistent, competent and caring."*



# Vulnerabilities

**Observation**

**Stakeholder Feedback**

# Vulnerability #1

## State Policy Changes and Regulations



The number and frequency of changes is creating disruption that is becoming more challenging to manage.



*"It seems like there is one change coming right after the next without a chance to catch your breath."*

# Vulnerability #2

## Workforce Shortages



Workforce shortages are impacting service provision.



*"We need to work together as a group to find solutions to maintain and sustain our workforce, including ISK's workforce."*

# Vulnerability #3

## Communication



ISK is experiencing communication challenges within the culture which may lead to an increase in turnover.



*"ISK has wonderful staff, but it seems like the right hand doesn't always know what the left is doing; several redundant meetings; does everyone have their own agenda there?"*

# Focus Areas

We are...

---

Financially innovative and adept, sustainable, adaptable and cost effective.

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Engaging systems and monitoring data and outcomes to ensure effective services.

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Excellent and transparent communicators, both internally and externally, providing timely, proactive and transparent communication.

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Collaborative, inclusive, effective community partners, engaged in planning, outreach, and engagement with underserved populations, Diversity, Equity, Inclusion and Belonging

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Hospitable, supporting persons served and our staff in honorable space (trauma informed and welcoming spaces)

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Invested in growth (capacity and trainings) and development of our workforce and leaders.





# Draft Strategic Plan Review

Values	Focus Areas	Goals	Objectives / Projects
We Value...	We Are...	We Will...	We will do "it" to get it done by:
Integrity Recovery Self-Determination Effectiveness	Financially innovative and stops, sustainable, adaptable, and cost effective. Engaging systems and monitoring data and outcomes to ensure effective services. Monitored via data.	Strive to build sustainable financial operations to support the delivery of CCBHC and specialty CHH supports and services.	<ol style="list-style-type: none"> <li>1. Review revenue (grants, capitation, local, CCBHC) to maximize benefit and mitigate risk while benefiting the community.</li> <li>2. Strengthen community safety net through revenue enhancement using investments, grants and other sources</li> <li>3. Achieve maximum CCBHC Quality bonus payments through targeted monitoring of indicators and targeted action plans.</li> <li>4. Identify and reduce uncompensated care without negatively impacting clinically necessary services.</li> <li>4a. Develop a clinical pathway for a commercial benefit for serving the commercially insured population.</li> <li>4b. Maximize collection from commercially insured population.</li> </ol>
		Deliver clinically necessary services in the most cost effective manner.	<ol style="list-style-type: none"> <li>1. Analyze and establish service delivery expectations and cost for each service delivery area.</li> <li>2. Determine clinical pathways by level of care.</li> <li>3. Use Community Needs Assessment to develop model for predicting future service demand and needs.</li> <li>4. Establish our staffing teams based on clinical need and service delivery expectations.</li> </ol>
Trust	Excellent and transparent communications, both internally and externally, providing timely, proactive, and transparent communication. (Incorporate objectives to persons served.)	Demonstrate an effective, open, and timely communication strategy.	<ol style="list-style-type: none"> <li>1. ISK will develop a written communication plan to provide guidance towards consistent and transparent communication.</li> <li>2. Establish and distribute guides to ISK staff for types and methods for internal and external communication. For example, when to use email vs TEAMS messaging vs posting announcements on the ISK portal.</li> </ol>
		Deliver respectful, accurate, and concise information.	<ol style="list-style-type: none"> <li>1. Targeted use of social media and marketing/promotional efforts to provide education, current trends, and opportunities for engagement on social media platforms. Last staff will involve ISK staff in suggesting topics to communicate to the public and stakeholders.</li> <li>2. Staff will be educated on and utilize culturally appropriateness and humility throughout all communication.</li> </ol>
		Make information accessible.	<ol style="list-style-type: none"> <li>1. ISK will hold all staff meetings virtually at least quarterly.</li> <li>2. ISK will develop a centralized space on the portal for correspondence and newsletters for all staff and providers to access.</li> </ol>
Community Partnership	Collaborative, inclusive, effective community partners, engaged in planning, outreach, and engagement with underserved populations. Diversity, Equity, Inclusion, and Belonging	Be active listeners to our diverse community needs.	<ol style="list-style-type: none"> <li>1. An Outreach and Engagement evaluation will be developed.</li> <li>2. We will complete a Community Needs Assessment and targeted surveys (Annually).</li> <li>3. We will actively collaborate with targeted community/neighborhood associations.</li> <li>4. We will create and participate within targeted focus groups (community forums), public listening sessions.</li> </ol>
		Be active participants in community initiatives.	<ol style="list-style-type: none"> <li>1. To be intentional and actively participate in our community, by attending events and/or co-sponsoring events that align with our vision and mission.</li> <li>2. Allow staff volunteer time per month to partner with local nonprofits and community groups that align with our vision and mission.</li> </ol>
		Actively involve community partners in change initiatives.	<ol style="list-style-type: none"> <li>1. Intentionally inviting or seeking opportunities for community partners to be collaborative in conversations and sessions, regarding change initiatives.</li> <li>2. Set up town hall (virtual meetings) to promote conversations with our community regarding changes with service delivery or establishment of new services that support and empower individuals to succeed.</li> </ol>
Respect	Hospitable - Supporting persons served and our staff in honorable spaces (trauma informed and welcoming spaces)	Ensure that our spaces meet the needs of individuals we serve, and staff needed to deliver the services.	<ol style="list-style-type: none"> <li>1. Complete trauma focused environmental walk-through assessments.</li> <li>2. Hold listening sessions with staff regarding workplace safety.</li> </ol>
	Increased access to crisis services and engagement in follow up care	Expand and grow Mobile Crisis Response (MCR) in partnership with law enforcement, community partners and dispatch. Increase engagement in transition and follow up care for individuals seeking services.	<ol style="list-style-type: none"> <li>1. Build out a dispatch system for MCR teams</li> <li>2. Expand MCR to serve all populations</li> <li>3. Develop an engagement team that will include individuals with lived experiences.</li> </ol>
Diversity Competency	Invested in growth (capacity and training) and development of our workforce and leaders.	Formalize a succession plan for key positions.	<ol style="list-style-type: none"> <li>1. Identify key positions.</li> <li>2. Create succession planning process using an equity lens.</li> </ol>
		Develop competent, caring, confident supervisors.	<ol style="list-style-type: none"> <li>1. Provide training for supervisors in trauma-informed, culturally inclusive supervision.</li> <li>2. Offer opportunities and tools for professional development.</li> </ol>
		Establish creative strategies to recruit and retain quality staff.	<ol style="list-style-type: none"> <li>1. Implement a third party employee engagement survey biannually.</li> <li>2. Intentional outreach to informal networks and community organizations.</li> <li>3. Develop accountability structure to ensure being performed through an equity lens and according to ISK policy</li> </ol>
	Offer opportunities and tools for workforce development and advancement.	<ol style="list-style-type: none"> <li>1. Identify paths for employees that build on strengths.</li> <li>2. Develop a mentorship program for employees seeking out advancement opportunities.</li> <li>3. Create a formalized professional development plan and process</li> </ol>	
	Be an inclusive, equitable, supportive, and trauma-informed workplace for all.	<ol style="list-style-type: none"> <li>1. Continue and expand existing efforts such as JET, Affinity Groups, Wellness Works, equity reviews, etc.</li> <li>2. Ensure staff behaviors support an inclusive, equitable, supportive, and trauma-informed workplace.</li> </ol>	

Values

We Value...

Focus Areas

We Are...

Goals

We Will...

Objectives/  
Projects

We will do "x"  
to get it done

Integrity

Recovery

Self-Determination

Effectiveness

Financially innovative and adept, sustainable, adaptable, and cost effective. Engaging systems and monitoring data and outcomes to ensure effective services. Monitored via data.

Strive to build sustainable financial operations to support the delivery of CCBHC and specialty CMH supports and services.

Deliver clinically necessary services in the most cost-effective manner.

1. Review revenue (grants, capitation, local, CCBHC) to maximize benefit and mitigate risk while benefiting the community.

1. Analyze and establish service delivery expectations and cost for each service delivery area.

2. Strengthen community safety net through revenue enhancement using investments, grants and other sources

2. Determine clinical pathways by level of care.

3. Achieve maximum CCBHC Quality bonus payments through targeted monitoring of indicators and targeted action plans.

3. Use Community Needs Assessment to develop model for predicting future service demand and needs.

4. Identify and reduce uncompensated care without negatively impacting clinically necessary services.

4. Establish our staffing teams based on clinical need and service delivery expectations.

4a. Develop a clinical pathway for a commercial benefit for serving the commercially insured individual.

4b. Maximize collection from commercially insured population.



## Values

We Value...

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We Will...

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We will do "x"  
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# Trust

Excellent and transparent communicators, both internally and externally, providing timely, proactive, and transparent communication. (Incorporate objectives to persons served.)

Demonstrate an effective, open, and timely communication strategy.

Deliver respectful, accurate, and concise information.

Make information accessible.

1. ISK will develop a written communication plan to provide guidance towards consistent and transparent communication.

1. Targeted use of social media and marketing/promotional efforts to provide education, current trends, and opportunities for engagement on social media platforms. Lead staff will involve ISK staff in suggesting topics to communicate to the public and stakeholders.

1. ISK will hold all staff meetings virtually at least quarterly.

2. Establish and distribute guides to ISK staff for types and methods for internal and external communication. For example, when to use email vs TEAMS messaging vs posting announcements on the ISK portal.

2. Staff will be educated on and utilize culturally appropriateness and humility throughout all communication.

2. ISK will develop a centralized space on the portal for correspondence and newsletters for all staff and providers to access.



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# Community Partnership

Collaborative, inclusive, effective community partners, engaged in planning, outreach, and engagement with underserved populations- Diversity, Equity, Inclusion, and Belonging

Be active listeners to our diverse community needs.

1. An Outreach and Engagement workplan will be developed.

2. We will complete a Community Needs Assessment and targeted surveys (Annually).

3. We will actively collaborate with targeted community/ neighborhood associations.

4. We will create and participate within targeted focus group (community forums), public listening sessions.

Be active participants in community initiatives.

1. To be intentional and actively participate in our community, by attending events and/or co-sponsoring events that align with our vision and mission.

2. Allow staff volunteer time per month to partner with local nonprofits and community groups that align with our vision and mission.

Actively involve community partners in change initiatives.

1. Intentionally inviting or seeking opportunities for community partners to be collaborative in conversations and sessions, regarding change initiatives.

2. Set up town hall (virtual meetings) to promote conversations with our community regarding changes with service delivery or establishment of new services that support and empower individuals to succeed.

## Values

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We will do "x"  
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# Respect

Hospitable- Supporting persons served and our staff in honorable spaces (trauma informed and welcoming spaces).

Increasing access to crisis services and engagement in follow up care.

Ensure that our spaces meet the needs of individuals we serve and staff needed to deliver the services.

Expand and grow Mobile Crisis Response (MCR) in partnership with law enforcement, community partners and dispatch.  
Increase engagement in transition and follow up care for individuals seeking services.

1. Complete trauma focused environmental walk-through assessments.

1. Build out a dispatch system for MCR teams

2. Hold listening sessions with staff regarding workspace safety.

2. Expand MCR to serve all populations

3. Develop an engagement team that will include individuals with lived experiences.

## Values

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# Diversity Competency

Invested in growth (capacity and trainings) and development of our workforce and leaders.

Formalize a succession plan for key positions

1. Identify key positions.

2. Create succession planning process using an equity lens.

Develop competent, caring, confident supervisors

1. Provide training for supervisors in trauma-informed, culturally inclusive supervision.

2. Offer opportunities & tools for professional development.

Establish creative strategies to recruit and retain quality staff

1. Implement a 3<sup>rd</sup> party employee engagement survey biannually.

2. Intentional outreach to informal networks and community organizations.

3. Develop accountability structure to ensure hiring is performed through an equity lens & according to ISK policy

Offer opportunities & tools for workforce development & advancement

1. Identify paths for employees that build on strengths.

2. Develop a mentorship program for employees seeking out advancement opportunities.

3. Create a formalized professional development plan and process

Be an inclusive, equitable, supportive, and trauma-informed workplace for all

1. Continue and expand existing efforts such as JETT, Affinity Groups, Wellness Works, equity reviews, etc.

2. Ensure staff behavior supports an inclusive, equitable, supportive, and trauma-informed workplace.

# Thank you!



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## Questions?