



## STRATEGIC PLAN

Fiscal Year 2023-2024

AREAS NEEDING IMPROVEMENT	ACTIONS TO BE TAKEN	TIMELINE	TEAM MEMBER(S) RESPONSIBLE	UPDATE: PROGRESS MADE
1. Integrate departmental software to its full potential	Accounting: Integrate with banks for automated cash flow entries  Integrate with Arize for automated service reporting to the General Ledger  Build the budgeting and forecasting module in Multiview	In progress June 30, 2024	Bree Flores (Accounting Director)	Arize has created a template to receive the data
	HR- Getting evaluations integrated within Paylocity	Completed Jun 2023	Claudia Cordova (HR Dir)	Completed
	IT- Inventory Software updated	Ongoing	David Brown (IT Director)	
	2. Renovate Portales Office	Seeking Grants for funding options (1 applied for and denied)  Seeking secondary temporary location for staff during the rebuild  Need to determine building design  Determine an Architect  Get design approved by DHI  Financially prepare for cost and payments  Work with project manager to determine phases of demo and rebuild.	Started June 2023	Brad Rikel (Executive Director- ED) Emily Gum (Executive Assistant- EA)
3. Update and continue ongoing CARF Certification standards.	Continue to update all agency plans  Continue ongoing performance measures  Continue educating staff on standards and ongoing quality improvement processes to adhere to CARF standards.  Policies continue to be revised and updated by the MHR Policy committee.  Continue with outpatient and PSR CARF accreditations	June 2022-June 2025	Liz Frederick (QI Director)	CARF re-certification was achieved for three years.

<p>4. Implementation of WRAP program in all serviceable counties</p>	<p>Ensuring amendments are in place with MCOs</p> <p>Hiring of staff for expansion</p> <p>Internal plans for expansion (operational, training needed, qualifications required)</p> <p>Seeking grants to fund the expansion, outreach, and locations</p>	<p>April 2023</p>	<p>Brad Rikel (ED) Lacy Keith Deputy Executive Director -DED) Destry Hernandez (Clinical Program Director)</p>	<p>State approved the expansion-June 2023</p> <p>Billing rate are in place</p>
<p>5. Seek more MOUs or contracts for rural service areas (Tucumcari, Ft. Sumner, CCP)</p>	<p>Seek in-person staff to sustain these types of agreements</p> <p>Outreach to area schools for MOUs</p>	<p>Future goal when workforce can be located</p>	<p>Brad Rikel (ED)</p>	<p>Clovis Municipal School MOU in place</p>
<p>6. Implementation of Arize</p>	<p>Continue to enhance Arize capabilities with service outcome reporting</p> <p>Test and train components</p> <p>Implement the Client Portal with Arize</p> <p>Build, train, and test staff on the client portal</p>	<p>Ongoing</p>	<p>Brad Rikel (ED) Lacy Keith (DED) David Brown (IT Director), Monica Banuelos (E.H.R. Trainer) Elizabeth Frederick (QI Director)</p>	<p>Went live 12/01/2022 with Arize</p>
<p>7. Develop MAT program</p>	<p>Continue with outreach and creation of MOUs</p>	<p>SOR3 implemented</p>	<p>Brad Rikel (ED) Lacy Keith (DED) Janine Kinninson (Clinical Director of Services) IOP Director Ryan Wood (MAT Provider)</p>	<p>MAT Program up and running as of 09/2022</p>
	<p>Ensuring MAT program is self-sustainable</p>			
	<p>Seek funding until self sustained</p>			
<p>8. MHR will partner with PRMC and RGH to implement the alternate Crisis Triage. (originally under the 988 grant)</p>	<p>Develop the feasibility of a pilot site (Clovis &amp; Portales CCP/Hospitals)</p> <p>Research and analysis of budgeting needs along with training.</p> <p>Community implementation pieces.</p>	<p>Completed Grant Received, Invoicing remains</p>	<p>Brad Rikel (ED) Lacy Keith (DED) Bree Flores (Acct. Dir.) Liz Frederick (QI Dir- state data reporting)</p>	
<p>9. Position MHR for financial stability and growth by</p>	<ul style="list-style-type: none"> <li>• Investment advisor meeting bi-weekly.</li> <li>Keep up on Day to Day financial transactions</li> <li>• Monitor Investments</li> <li>Administrative cash flow meeting weekly.</li> <li>• Projected Growth</li> <li>• Debt Free</li> <li>• Financial Committee meeting monthly (with Board attendance)</li> <li>• Allow time for analyzing and planning</li> <li>• Decrease Expenses</li> <li>• Bring training onsite and available to all interested staff.</li> </ul> <p>External Financial Analysis</p> <p>Seek more grant oportunities</p>	<p>Ongoing</p>		

<p>increasing revenue, diversifying funding, and decreasing expenses.</p>	<p>Added a new administrative position - provides support and stability to Payroll, Human Resources, and Accounting Director from being crosstrained on daily duties.</p> <p>Added a new platform- Harness- for donations, marketing, planning events, and campaigns.</p> <p>Social Media presence has increase, spreading awareness of Mental Health and sharing MHR services, contact information.</p>	<p>Ongoing</p>	<p>Bree Flores (Acct Dir)  Claudia Cordova (HR Director)  Candy Avila (Billing Director)  Brad Rikel (ED)  Lacy Keith (DED)  Emily Gum (EA)  Susan Fackler (Payroll Director)  Caitlin Pollard (Policy/Grant Writer)</p>	
<p>10. MHR will continue to work to gain employees.</p>	<p>Increase benefits:  401K match was increased to 4%  Student Loan Repayment (HRSA)  Bonuses (Production, Retention)  Health, Gap, Dental, Vision, and Life Insurance (dismemberment, accidental death, long term disability) offered to FT employees (out to bid annually for cost savings)  Providing EAP to all staff and their families  Providing Smart Dollar to all staff  Providing Sick Leave to part-time and full-time employees (07/01/22)  Providing PTO to full-time staff</p> <p>Marketing of Open Position postings (Indeed, social media, job fairs)  Remote capabilities for out-of-state providers.</p> <p>Annual review and necessary adjustments of starting wages.  Compensation committee created for wage review. (includes Board attendants)  COLA considered annually.</p>	<p>Ongoing</p>	<p>Bree Flores (Acct Dir)  Claudia Cordova (HR Director)  Candy Avila (Billing Director)  Brad Rikel (ED)  Lacy Keith (DED)  Emily Gum (EA)  Susan Fackler (Payroll Director)  Select Board Members</p>	
<p>11. CCBHC Implementation</p>	<p>Compliance Check list  Cost analysis</p>	<p>June 2023-ongoing</p>	<p>Brad Rikel (ED)  Lacy Keith (DED)  Bree Flores (Acct Dir)  Liz Frederick (QI Dir.)</p>	