



Lifeline Connections' Strategic Plan

Fiscal Years 2014 -2019

Introduction

Each fiscal year Lifeline Connections continues to make strides towards becoming financially stable. As the organization looks towards the future, it becomes clear that the future is full of opportunities and uncertainty. The management team and the board of directors of Lifeline dedicated time to look towards the future and set goals and objectives that will move the organization forward.

Some of the objectives that the board of directors made special note of in their annual retreat are the following:

- Selecting, purchasing and implementing an electronic health record
- Explore opportunities to expand and enhance our co-occurring services
- Explore opportunities to integrate primary care into our existing programs
- Explore partnerships with other organizations as to enhance the services offered our clients
- Focus on board of directors recruitment

As the health care environment changes across the county and in the state of Washington, Lifeline will need to be able to adjust to those changes quickly. This strategic plan will help the agency plan for the future, but also adjust to the changing environment as needed.

Vision Statement

Our vision of Lifeline Connections is to be the recognized premier provider of substance use and mental health services in the Pacific Northwest by providing integrated care, comprehensive services, and enduring relationships.

Mission Statement

Through the use of superior customer service, high quality programs and a well trained and dedicated staff, our mission is to inspire hope and support life saving changes for people affected by substance use and mental health conditions

Values

We take responsibility for the quality of the services we deliver. We will be the “Best in Class” in value and outcomes. Each of us is responsible for the quality of whatever we do.

We deliver satisfaction to both our internal and external customers. We believe in respecting our customer's needs, listening to their requests and exceeding their expectations.

We act with integrity in all that we do. We are each personally accountable for the highest standards of behavior, including honesty and fairness in all aspects of our work.

We value our people and treat one another with respect and take pride in the contributions that come from the diversity of individuals and ideas.

We regard our Community Partners as essential team members. We believe they deserve fair and equitable treatment, clear agreements and honest feedback. We consider our Community Partner's needs in conducting all aspects of our business.

Strategic Direction FY 2014-2019

Goals	Objectives	Performance Measure	Action Plan	Responsible	Resources	Timeline
Promote a healthy organizational culture at Lifeline Connections	<ul style="list-style-type: none"> Values statements are evaluated 	<ul style="list-style-type: none"> Determine if changes are needed 	<ul style="list-style-type: none"> Include discussion around branding 	<ul style="list-style-type: none"> Management Team 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Long Term: 2017
	<ul style="list-style-type: none"> At least 80% of staff report satisfaction with their job 	<ul style="list-style-type: none"> Staff survey 	<ul style="list-style-type: none"> Administer annually 	<ul style="list-style-type: none"> Management Team 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Ongoing
	<ul style="list-style-type: none"> Provide a cost of living increase to staff and implement a merit increase program 	<ul style="list-style-type: none"> Merit increase standard is implemented for employees and departments 	<ul style="list-style-type: none"> Review the financial feasibility Evaluate Performance Reviews Process 	<ul style="list-style-type: none"> Lead: CEO/CFO Management Team Finance Committee 	<ul style="list-style-type: none"> Cost of a COLA Cost of merit increases 	<ul style="list-style-type: none"> Ongoing Long Term: implement a merit increase program 2016/2017
	<ul style="list-style-type: none"> At least two staff social events are held 	<ul style="list-style-type: none"> Successful execution of two events 	<ul style="list-style-type: none"> Support and encourage Activities Committee 	<ul style="list-style-type: none"> Activities Committee 	<ul style="list-style-type: none"> \$3000.00 	<ul style="list-style-type: none"> Short Term: Q4
	Maintain an optimal board of directors size (12 -14)	<ul style="list-style-type: none"> Recruit members of the board 	Explore backgrounds that could benefit Lifeline	<ul style="list-style-type: none"> Lead: Board of Directors CEO 	No new added expense	Ongoing
	<ul style="list-style-type: none"> Decrease staff 	Decrease	<ul style="list-style-type: none"> Establish 	<ul style="list-style-type: none"> Lead: HR 	<ul style="list-style-type: none"> No new added 	<ul style="list-style-type: none"> Short Term: Q4

	turnover	turnover by 3%	<ul style="list-style-type: none"> baseline Monitor turnover rates each Qtr Research industry standard 	<ul style="list-style-type: none"> Management Team 	expense	
	<ul style="list-style-type: none"> Ensure consistent wages 	Develop and implement grade/step system	<ul style="list-style-type: none"> Research other similar systems 	<ul style="list-style-type: none"> Lead: HR 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Implement New System/2017 Review the following positions:
	<ul style="list-style-type: none"> Ensure seamless leadership transition 	<ul style="list-style-type: none"> Develop a succession plan 	<ul style="list-style-type: none"> Discuss succession scenarios 	<ul style="list-style-type: none"> Lead: HR Management Team 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Officers/Directors/Supervisor/2017
	<ul style="list-style-type: none"> Improve internal communications 	<ul style="list-style-type: none"> Implement procedure to improve internal communication 	<ul style="list-style-type: none"> Executive team attends periodic department staff meetings 	<ul style="list-style-type: none"> Executive Team 	<ul style="list-style-type: none"> No new added expense 	Short Term: Q2
Improve the financial stability of the agency	<ul style="list-style-type: none"> Accounts payable over 120 days is reduced by 25% 	<ul style="list-style-type: none"> Review of monthly AP totals 	<ul style="list-style-type: none"> Continual look to reduce expenses 	<ul style="list-style-type: none"> Lead: CFO Management Team 	<ul style="list-style-type: none"> No new added expense 	Short Term: Q4
	<ul style="list-style-type: none"> Operating reserve account is funded monthly 	<ul style="list-style-type: none"> Monthly deposits 	<ul style="list-style-type: none"> Budget for monthly deposits 	<ul style="list-style-type: none"> CFO 	<ul style="list-style-type: none"> Existing resources 	<ul style="list-style-type: none"> Short Term: Q1-Q4
	<ul style="list-style-type: none"> Seventy-five percent (75%) of clinical and 	<ul style="list-style-type: none"> End of fiscal year financials 	<ul style="list-style-type: none"> Constant evaluation of programs 	<ul style="list-style-type: none"> Management Team 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Short Term: Q4

medical programs are financially self-sustaining		revenues and expenses			
<ul style="list-style-type: none"> Seventy five percent (75%) of self-pay accounts are current 	Private Pay reports reflect that 75% of self-pay accounts have made a payment within the past 60 days	Continue to follow collections procedures	<ul style="list-style-type: none"> Lead: Billing Director Billing Team 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Short Term: Q4
<ul style="list-style-type: none"> Establish and hold an annual fundraising event 	<ul style="list-style-type: none"> Event held 	<ul style="list-style-type: none"> Identify staff capacity Plan and execute event 	<ul style="list-style-type: none"> Lead: Fund Development Staff Management Team Fund Development Committee 	<ul style="list-style-type: none"> Events related expense 	<ul style="list-style-type: none"> Long Term: 2017
<ul style="list-style-type: none"> Develop a volunteer/inter n training/recruitment plan 	<ul style="list-style-type: none"> Plan developed, Plan implemented 	<ul style="list-style-type: none"> Develop capacity standard for each program 	<ul style="list-style-type: none"> Lead: HR Management Team 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Short Term: Q4
<ul style="list-style-type: none"> Improve Cash Flow 	<ul style="list-style-type: none"> Pay off Cash Advance 	<ul style="list-style-type: none"> Continue to make scheduled payments 	<ul style="list-style-type: none"> Lead: CFO Finance Committee 	<ul style="list-style-type: none"> Payments 	<ul style="list-style-type: none"> Long Term: 2017

	<ul style="list-style-type: none"> Improve recruitment of qualified staff 	<ul style="list-style-type: none"> Develop a recruitment plan 	<ul style="list-style-type: none"> Analyze recruitment efforts 	<ul style="list-style-type: none"> Lead: HR 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Short Term: Q4
Enhance treatment outcomes	<ul style="list-style-type: none"> Provide additional treatment options for our region and clients 	<ul style="list-style-type: none"> Open new programs to meet the community need Partnerships with other agencies 	<ul style="list-style-type: none"> Review community treatment needs in our region 	<ul style="list-style-type: none"> Lead: CEO Management Team Board of Directors 	<ul style="list-style-type: none"> Program related expenses 	<ul style="list-style-type: none"> Short & Long Term: Q1 - 2019
	<ul style="list-style-type: none"> At least 90% of clients report satisfaction with their treatment 	<ul style="list-style-type: none"> Patient survey 	<ul style="list-style-type: none"> Administer annually 	<ul style="list-style-type: none"> Management Team 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Short Term: Q4
	<ul style="list-style-type: none"> Integrate primary care into our programs 	<ul style="list-style-type: none"> Co-locate primary care services onsite Outstation BH professionals at PCP sites 	<ul style="list-style-type: none"> Explore relationships Explore funding sources 	<ul style="list-style-type: none"> Lead: CEO Management Team 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> Ongoing
	<ul style="list-style-type: none"> An electronic health record is implemented 	<ul style="list-style-type: none"> EHR is implemented and functional 	<ul style="list-style-type: none"> Planning meetings held to review status 	<ul style="list-style-type: none"> Lead: CCO Management Team IT 	<ul style="list-style-type: none"> Staff time 	<ul style="list-style-type: none"> Short Term: Q3
	<ul style="list-style-type: none"> Ensure treatment is accessible 	<ul style="list-style-type: none"> Conduct accessibility assessment 	<ul style="list-style-type: none"> Explore an open access system 	<ul style="list-style-type: none"> Management Team 	<ul style="list-style-type: none"> No new added expense 	<ul style="list-style-type: none"> Short Term: Q3
	<ul style="list-style-type: none"> Ensure positive treatment 	<ul style="list-style-type: none"> Review current EBPs 	<ul style="list-style-type: none"> Conduct EBP fidelity 	<ul style="list-style-type: none"> Lead: CCO Program 	<ul style="list-style-type: none"> Staff Time 	<ul style="list-style-type: none"> Long Term: 2017

	outcomes	and impact	review	Directors		
	<ul style="list-style-type: none"> Enhance treatment access and outcomes by using technology 	<ul style="list-style-type: none"> Implement technology 	<ul style="list-style-type: none"> Explore current and future technology Smartphone apps Tablets Client web portal 	<ul style="list-style-type: none"> Management Team IT 	<ul style="list-style-type: none"> Implementation costs 	Short & Long Term: Q1 - 2019
Educate our community about recovery through advocacy and outreach	<ul style="list-style-type: none"> Lifeline Alumni is strengthened by holding a recovery event 	<ul style="list-style-type: none"> Successful execution of two events 	<ul style="list-style-type: none"> Support and encourage Alumni Committee 	Alumni Committee	<ul style="list-style-type: none"> Events related expenses 	<ul style="list-style-type: none"> Short Term: Q1-Q4
	<ul style="list-style-type: none"> Participate in at least two recovery-focused events hosted by community members or partners 	<ul style="list-style-type: none"> Events scheduled and participated in 	<ul style="list-style-type: none"> Hands Across the Bridge and May event 	<ul style="list-style-type: none"> Management Team Activities Committee 	<ul style="list-style-type: none"> Costs associated with event participation 	<ul style="list-style-type: none"> Short Term: Q1-Q4
	<ul style="list-style-type: none"> Expand community participation 	<ul style="list-style-type: none"> Form an advisory board for relevant programs 	<ul style="list-style-type: none"> Recruit advisory board members 	<ul style="list-style-type: none"> Lead: CEO Program Directors 	<ul style="list-style-type: none"> No new added expense 	Short & Long Term: Q4 - 2019