

# Three-Year Strategic Plan

FY 2022-2024

Community Access & Connection

Financial Sustainability

Organizational Integration

Transforming through Diversity

Workforce Development



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# Three-Year Strategic Plan FY 2022-2024

## *Introduction*

### **Purpose**

Oak Hill, Gilead Community Services, and Easterseals of Oak Hill are three affiliated organizations that provide services and supports to people with disabilities, including developmental disabilities, mental health conditions, and substance use disorders and their families within the State of Connecticut. The three organizations came together for the purpose of developing an integrated strategic plan which outlines their collective strategic priorities over the next three years.

### **Process**

The organizations established a cross-functional Strategic Planning Team (SPT) and engaged external consultant, KJR Consulting (KJR), to help guide the strategic planning process. Input was gathered from a variety of internal and external stakeholder groups including the Board of Directors, Senior Leadership, Program Leaders, Staff, Donors & Partners, Program Participants, and Families through a series of planning retreats, focus groups, and electronic surveys.

KJR and the SPT convened on numerous occasions between April and December 2021 to process stakeholder input, define strategic priorities, and draft and revise strategic plan content. KJR and the SPT also worked independently to complete strategic planning tasks, as needed. A heavy emphasis was placed on collaboration, inclusivity, and input throughout the planning process.

### **Results**

The cumulative result of this process is a three-year plan which identifies five **Strategic Issues** (presented in alphabetical order):

1. Community Access & Connection
2. Financial Sustainability
3. Organizational Integration
4. Transforming through Diversity
5. Workforce Development

The plan is further broken down into the subcategories defined below. Each subcategory addresses the strategic issue with increasing specificity.

1. **Strategic Issues:** What organizational challenge do we need to be address?
2. **Goals:** What do we want to achieve in order to address the organizational challenge?
3. **Objectives:** How will we address the identified organizational challenge?
4. **Interventions:** What steps should we take in order to achieve our objectives?

A total of 376 individual interventions were developed to address the five Strategic Issues. Interventions are subsequently linked to a series of operational plans which will guide their implementation. Target completion dates are also identified for each intervention.

## **Acknowledgements**

Special thanks to the following individuals whose participation was integral to the development of the enclosed strategic plan. The time, effort, and commitment you have devoted to this process are greatly appreciated.

### ***Strategic Planning Team***

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# How to Read this Plan

Unlike traditional documents, this plan is not intended to be read from cover to cover. Instead, it is formatted to allow readers to view content at various levels of detail based on their individual needs and interests. We have incorporated several features throughout the document to make it easy to navigate. The following illustrations highlight key features to be aware of.

Each Strategic Issue is color-coded to allow readers to easily differentiate one content area from another.



Issues, goals, objectives, and interventions are differentiated by the number of decimal points. More decimal points indicates higher levels of detail.

## 1. Strategic Issue

1.1

Goals

1.1.1

Objectives

1.1.1.1

Interventions

Deeper levels of detail are shown in lighter shades within the same color scheme.

1. Community Access & Connection		
To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.		
1.1	Needs Assessment: Continually assess and align services to better meet the needs of the community, people we serve, and underserved populations.	p. 8
1.2	Relationships: Strengthen our relationships with for-profit and nonprofit businesses, family members and natural supports, and key community leaders and stakeholders to cultivate inclusion, improve collaboration and increase resources.	p. 12
1.3	Service Excellence: Deliver high quality services and the tools to measure outcomes and impact.	p. 16
1.4	Service Innovation: Develop, modify, and expand services to meet evolving community needs and ensure their long-term sustainability.	p. 20
1.5	Community Outreach	
1.6	Community Advocacy	

Each goal and objective is accompanied by a page number. This lets you know where to turn for more details about that item. Clicking the page number will hyperlink you directly to the indicated page when viewed in PDF format.

Each issue can be viewed at the goal, objective, or intervention levels.

1. Community Access & Connection		
To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.		
1.1	Needs Assessment: Continually assess and align services to better meet the needs of the community, people we serve, and underserved populations.	
1.1.1	Use available demographic and research data to identify community needs.	p. 9
1.1.2	Identify and assess the unmet needs within the organizations' continuum of care with particular attention to social determinants of health.	p. 10
1.1.3	Continue and expand networking relationships with surrounding municipal governments and organizations (such as police, hospitals, EMTs) to identify population needs and opportunities.	p. 11

1. Community Access & Connection			
To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.			
1.1	Needs Assessment: Continually assess and align services to better meet the needs of the community, people we serve, and underserved populations.		
1.1.1	Use available demographic and research data to identify community needs.	Operational Plan	Target Date
1.1.1.1	Identify at least one community or government produced needs assessment to inform program development or expansion needs across all service types including Outpatient, Residential, Education and other Community Programs.	Program Plan: OHS (OH) Program Plan: OHCP (OH) Clinical Program Plan (G) Information Technology (G)	June 23
1.1.1.2	Explore feasibility to open classrooms in New Haven, Bridgeport, and New London areas to fill regional presence gaps.	Program Plan: OHS (OH)	June 23
1.1.1.3	Explore the feasibility of providing transportation for students who attend OHS.	Program Plan: OHS (OH)	June 24
1.1.1.4	Provide requested data for business units based on available census data, social media data, and advertising analytics for the areas that we serve in order to facilitate data-driven decision making.	IT Plan (G)	June 23
1.1.1.5	Develop (OH) or continue to enhance (G) a community outreach model that communicates each organization's impact, educates the community about our services while also learning about the range of services being offered both internally (among affiliate partners) and externally.	Development Plan (OH, G)	June 23
1.1.1.6	Work with the state and towns we serve to understand key initiatives and opportunities our organizations could address.	IT Plan (G)	June 22

Interventions include associated operational plans. The initials "OH" and "G" indicate which agency is responsible for the plan. Target completion dates are also included.

The "Home" button at the bottom of each page brings you back to the Table of Contents.

## **1. Community Access & Connection**

To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.

## **2. Financial Sustainability**

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

## **3. Organizational Integration**

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

## **4. Transforming through Diversity**

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

## **5. Workforce Development**

The organizations, consistent with industry trends, experience staffing shortages related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

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1.1	<b>Needs Assessment:</b> Continually assess and align services to better meet the needs of the community, people we serve, and underserved populations.	p. 9
1.2	<b>Relationships:</b> Strengthen our relationships with for-profit and nonprofit businesses, family members and natural supports, and key community leaders and stakeholders to cultivate inclusion, improve collaboration and increase resources.	p. 13
1.3	<b>Service Excellence:</b> Deliver high quality services and the tools to measure outcomes and impact.	p. 17
1.4	<b>Service Innovation:</b> Develop, modify, and expand services to meet evolving community needs and ensure their long-term sustainability.	p. 21
1.5	<b>Community Outreach and Awareness:</b> Enhance public awareness of the organizations' programs and services.	p. 27
1.6	<b>Community Advocacy:</b> Develop and enhance strategies to advocate for the people we serve.	p. 31



## 1. Community Access & Connection

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### 1.1

**Needs Assessment:** Continually assess and align services to better meet the needs of the community, people we serve, and underserved populations.

#### 1.1.1

Use available demographic and research data to identify community needs.

p. 10

#### 1.1.2

Identify and assess the unmet needs within the organizations' continuum of care with particular attention to social determinants of health.

p. 11

#### 1.1.3

Continue and expand networking relationships with surrounding municipal governments and organizations (such as police, hospitals, EMTs) to identify population needs and opportunities.

p. 12

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1.1.1.2	Explore feasibility to open classrooms in New Haven, Bridgeport, and New London areas to fill regional presence gaps.	Program Plan: OHS (OH)	June 23
1.1.1.3	Explore the feasibility of providing transportation for students who attend OHS.	Program Plan: OHS (OH)	June24
1.1.1.4	Provide requested data for business units based on available census data, social media data, and advertising analytics for the areas that we serve in order to facilitate data-driven decision making.	IT Plan (G)	June 23
1.1.1.5	Develop (OH) or continue to enhance (G) a community outreach model that communicates each organization's impact, educates the community about our services while also learning about the range of services being offered both internally (among affiliate partners) and externally.	Development Plan (OH, G)	June 23
1.1.1.6	Work with the state and towns we service to understand key initiatives and opportunities our organizations could address.	IT Plan (G)	June 22

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## 1.1

**Needs Assessment:** Continually assess and align services to better meet the needs of the community, people we serve, and underserved populations.

### 1.1.2

Identify and assess the unmet needs within the organizations' continuum of care with particular attention to social determinants of health.

Operational Plan

Target Date

#### 1.1.2.1

Develop and implement internal surveys designed to assess existing unmet needs among persons served (including all referrals). Ensure that the surveys themselves are accessible for people with disabilities.

Accessibility Plan (OH, G)  
Program Plan: OHC (OH)  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

#### 1.1.2.2

Assess needs of target populations that are not currently being served by any of our three organizations.

Accessibility Plan (OH, G,  
Program Plan: OHS (OH)  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

#### 1.1.2.3

Identify potential barriers, including physical ability, race, culture and digital accessibility (website, social media, etc..) that might prevent access to services.

Accessibility Plan (OH, G)  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

#### 1.1.2.4

Design and implement new programming and services to provide appropriate support for those unmet needs.

Accessibility Plan (OH, G)  
Program Plan: OHS (OH,  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 24

#### 1.1.2.5

Explore the feasibility of an extended day program for students that do not attend Oak Hill Schools and an inclusive Pre-K daycare program that is aligned with our mission, philosophies, and CT Early Learning and Development standards.

Program Plan: OHS (OH)

June 24

#### 1.1.2.6

Explore the feasibility of developing a consulting service, in which Oak Hill's Education Department would support the district's capacity to provide high quality programming for each student.

Program Plan: OHS (OH)

June 24

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**Needs Assessment:** Continually assess and align services to better meet the needs of the community, people we serve, and underserved populations.

1.1.3	Continue and expand networking relationships with surrounding municipal governments and organizations (such as police, hospitals, EMTs) to identify population needs and opportunities.	Operational Plan	Target Date
1.1.3.1	Develop a strong understanding of what services are already offered by other organizations in the community to address existing needs and create strong collaborative partnerships to enhance and strengthen these services.	Program Plan: OHC (OH) Clinical Program Plan (G)	June 24
1.1.3.2	Identify a list of currently operating private organization and governmental collaborations or workgroups (e.g., CCT, NB Recovers, Opiate Task Forces, etc..) in each geographic area or within each department and assign attendance by staff.	Clinical Program Plan (G)	June 22
1.1.3.3	Explore the creation of a working group of private organizations and government agencies to meet informally and periodically to facilitate the coordinated provision of services.	Clinical Program Plan (G)	June 23
1.1.3.4	Identify key community stakeholders who may be missing from existing collaborations and create innovative strategies for greater inclusion.	Program Plan: OHCP (OH) Clinical Program Plan (G)	June 23
1.1.3.5	Develop a community outreach model that communicates the organization's community impact and educates about our services while also learning about range of services being offered by other providers.	Development Plan (OH, G)	June 24

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### 1.2

**Relationships:** Strengthen our relationships with for-profit and nonprofit businesses, family members and natural supports, and key community leaders and stakeholders to cultivate inclusion, improve collaboration and increase resources.

#### 1.2.1

Develop a geographic and community driven plan to build relationships within communities where we currently serve individuals.

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#### 1.2.2

Improve and implement strategy of regular contact for fundraising and advocacy purposes.

p. 15

#### 1.2.3

Build up corporate, university, and private volunteering initiatives.

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Develop a geographic and community driven plan to build relationships within communities where we currently serve individuals.

Operational Plan

Target Date

##### 1.2.1.1

Appoint one or more individuals to act as community outreach liaisons.

Clinical Program Plan (G)  
Development Plan (OH)

June 23

##### 1.2.1.2

Establish educational programs and support groups to meet the needs of the people we serve.

Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

##### 1.2.1.3

Develop at least 5 new strategic partnerships with for-profit or nonprofit businesses related to Gilead's Mental Health Resource Center.

Clinical Program Plan (G)

June 23

##### 1.2.1.4

Develop a workgroup consisting of multiple departments at all levels of the organization and constituents to participate in planning and implementation of strategies to expand relationships within communities where we currently provide services.

Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

##### 1.2.1.5

Enhance engagement opportunities to educate families and other social supports on the numerous ways they can get involved in our mission and how we may collaborate.

Development Plan (OH, G)

June 24

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**Relationships:** Strengthen our relationships with for-profit and nonprofit businesses, family members and natural supports, and key community leaders and stakeholders to cultivate inclusion, improve collaboration and increase resources.

#### 1.2.2

Improve and implement strategy of regular contact for fundraising and advocacy purposes.

Operational Plan

Target Date

##### 1.2.2.1

Partner with the CT Nonprofit Alliance to regularly engage board members and family members for advocacy purposes.

Program Plan: OHCP (OH)  
Facilities Plan (OH)

June 23

##### 1.2.2.2

Proactively reach out to families with newly discovered needs to introduce the organization and its services.

Clinical Program Plan (G)

June 22

##### 1.2.2.3

Develop strategies to address any existing and emerging barriers (including privacy law) that prevent family member involvement in advocacy and fundraising activities.

Clinical Program Plan (G)

June 22

##### 1.2.2.4

Explore strategies for enhancing the organization's relationship with NAMI through things such as family groups and advocacy.

Clinical Program Plan (G)

June 23

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**Relationships:** Strengthen our relationships with for-profit and nonprofit businesses, family members and natural supports, and key community leaders and stakeholders to cultivate inclusion, improve collaboration and increase resources.

#### 1.2.3

Build up corporate, university, and private volunteering initiatives.

Operational Plan

Target Date

##### 1.2.3.1

Assess and implement programmatic volunteer opportunities that exist within current service models.

Program Plan: OHC (OH)

June 23

##### 1.2.3.2

Identify local colleges and universities with human services or other relevant programs.

HR Plan (G)

June 22

##### 1.2.3.3

Evaluate resources necessary to support a strong volunteer program at Oak Hill and Gilead.

Development Plan (OH, G)

June 24

##### 1.2.3.4

Disseminate recruitment marketing materials to local colleges, universities, local and statewide organizations, town boards, advocacy, community recreation centers that have been identified as partners.

HR Plan (OH)

June 22



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### 1.3

**Service Excellence:** Deliver high quality services and the tools to measure outcomes and impact.

#### 1.3.1

Develop a method to ensure effective staffing ratios within programs and to ensure the highest quality of services delivered to the community.

p. 18

#### 1.3.2

Develop service excellence standards for all programs to include diversity and cultural differences, social determinants of health, and which include measurable outcomes and quality standards.

p. 19

#### 1.3.3

Create and provide regular feedback to all personnel and other stakeholders on the results of the implemented outcome measures.

p. 20

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### 1.3 Service Excellence: Deliver high quality services and the tools to measure outcomes and impact.

1.3.1	Develop a method to ensure effective staffing ratios within programs and to ensure the highest quality of services delivered to the community.	Operational Plan	Target Date
1.3.1.1	Identify the ideal staffing ratios within programs, create a method to monitor, and implement monitoring strategies.	Program Plan: OHCP (OH) Quality Assurance Plan (OH, G)	June 23
1.3.1.2	Implement a budgeting process to compare historical staffing ratios to current needs and funding levels.	Program Plan: OHCP (OH) Finance MGT Plan (OH, G)	June 22
1.3.1.3	Expand and adapt the emergency staffing plan developed during the COVID-19 pandemic to address specific program challenges.	Program Plan: OHCP (OH) Clinical Program Plan (G)	June 22
1.3.1.4	Develop strategies and measurable targets to expand per diem staffing pool.	Clinical Program Plan (G)	June 22

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## 1.3 Service Excellence: Deliver high quality services and the tools to measure outcomes and impact.

1.3.2

Develop service excellence standards for all programs to include diversity and cultural differences, social determinants of health, and which include measurable outcomes and quality standards.

Operational Plan

Target Date

1.3.2.1

Implement outcome measures at the Gilead Farrell Treatment Center's Residential, IOP, and Outpatient programs and include specific outcomes for substance treatments.

Quality Assurance Plan (OH, G)  
HR Plan (G)  
Corporate Compliance Plan (G)

June 24

1.3.2.2

Develop and implement outcome goals, objectives, and measures for Oak Hill's administrative departments that demonstrate their contribution to the achievement of the organization's mission.

Quality Assurance Plan (OH)  
HR Plan (OH)  
Corporate Compliance Plan (G)

June 24

1.3.2.3

Develop and implement outcome goals, objectives, and measures for Gilead's Mental Health Resource Center.

Quality Assurance Plan (G)

June 24

1.3.2.4

Ensure Gilead maintains and improves its conformance to CARF standards and achieves full re-accreditation.

Quality Assurance Plan (G)

June 23

1.3.2.5

Create revisions and improvements in Oak Hill's policies, procedures, and processes to work towards conformance to CARF standards for possible future accreditation.

Quality Assurance Plan (OH)

June 24

1.3.2.6

Develop curriculum system rooted in Oak Hill School philosophies and educational methodology, CCSS, and CSDE regulations and licensure requirements.

Program Plan: OHS (OH)

June 24

1.3.2.7

Use the performance evaluation tool to evaluate each departments performance as it relates to the organization's mission.

HR Plan (OH)

June 23

1.3.2.8

Integrate this objective into the new DEI plan when it is developed.

Cultural Competency Plan (G)

June 24

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## 1.3 Service Excellence: Deliver high quality services and the tools to measure outcomes and impact.

1.3.3	Create and provide regular feedback to all personnel and other stakeholders on the results of the implemented outcome measures.	Operational Plan	Target Date
1.3.3.1	Regularly review and revise program and administrative outcome measures and provide consistent and clear reporting and improved feedback to relevant stakeholders on performance.	Quality Assurance Plan (OH, G)	June 24
1.3.3.2	Incorporate review of measures into department and supervisory meetings.	Program Plan I (OH)	June 23
1.3.3.3	Provide monthly actual vs budget reports per program to analyze the impact of implemented outcome measures on program financials.	Finance MGT Plan (OH, G)	June 22
1.3.3.4	Continue to communicate Gilead Outcome Measure Results through the Gilead Intranet Page and through an annual summary communication to all stakeholders.	Executive Plan (G)	June 22
1.3.3.5	Develop a communication plan that effectively communicates organizational impact.	Development Plan (OH, G)	June 23
1.3.3.6	Continue to promote and educate managers on culture of data management and provide data through reports by start of FY23.	Executive Plan (OH)	June 22

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1.4	<b>Service Innovation:</b> Develop, modify, and expand services to meet evolving community needs and ensure their long-term sustainability.
1.4.1	Develop increased opportunities for departments to collaborate and work together to increase creative output. p. 22
1.4.2	Explore new interventions that would better meet the needs and preferences of the community and include cultural differences, social determinants of health, and other barriers to access. p. 23
1.4.3	Identify new private pay service(s) with potential for scalability and profit enhancement. p. 24
1.4.4	Each program will develop an expansion proposal which senior leadership will evaluate for viability. p. 25
1.4.5	Develop strategies to ameliorate barriers to access including physical and cultural barriers. p. 26

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### 1.4 Service Innovation: Develop, modify, and expand services to meet evolving community needs and ensure their long-term sustainability.

1.4.1	Develop increased opportunities for departments to collaborate and work together to increase creative output.	Operational Plan	Target Date
1.4.1.1	Actively seek partnerships and collaborations related to existing art programs.	Program Plan: OHS (OH)	June 23
1.4.1.2	Invite other departments to participate in regular department meetings.	Program Plan: OHC (OH) Program Plan: OHCP (OH)	June 23
1.4.1.3	Attend existing Clinical Rounds meetings twice per year to discuss recommendations for service innovation and expansion.	Executive Plan (G)	June 23
1.4.1.4	Use virtual platforms to share individual program knowledge/expertise in planned offerings at some consistent frequency across OH/GCS/ES programs (should be fun and educational).	Clinical Program Plan (G)	June 24
1.4.1.5	Develop a platform to share articles/info available to all program staff.	Clinical Program Plan (G)	June 23
1.4.1.6	Explore the use of a committee that will come together and discuss recognized needs of the employees and explore training resources where we may assist. Consult and provide training or resources to the departments based on committee recommendations.	HR Plan (OH)	June 22
1.4.1.7	Implement a new executive level role at Oak Hill to promote increased collaboration and program development.	Executive Plan (OH)	June 22

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### 1.4 Service Innovation: Develop, modify, and expand services to meet evolving community needs and ensure their long-term sustainability.

1.4.2	Explore new interventions that would better meet the needs and preferences of the community and include cultural differences, social determinants of health, and other barriers to access.	Operational Plan	Target Date
1.4.2.1	Identify, develop and promote resources for adults with co-occurring disabilities (e.g., mental health and developmental disabilities).	Accessibility Plan (OH, G) Clinical Program Plan (G) Executive Plan (OH)	June 24
1.4.2.2	Actively seek relationships with new school districts and educational organizations/agencies.	Program Plan: OHS (OH)	June 24
1.4.2.3	Develop at least one new organizational relationship that provides input related to the needs of the community.	Executive Plan (OH)	June 23
1.4.2.4	Develop and implement a training and integration plan to increase knowledge and skills of staff regarding social determinants of health.	Clinical Program Plan (G)	June 22
1.4.2.5	Provide a calendar of training offerings as part of the organization's professional development efforts to provide effective tools for our staff related to diversity, equity and inclusion.	Program Plan: OHCP (OH) HR Plan (OH) Executive Plan (OH)	June 22
1.4.2.6	Explore ways to adjust service offerings to provide access and interest specifically for people of color.	Cultural Competency Plan (G)	June 24

## 1. Community Access & Connection

To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.

### 1.4 Service Innovation: Develop, modify, and expand services to meet evolving community needs and ensure their long-term sustainability.

#### 1.4.3

Identify new private pay service(s) with potential for scalability and profit enhancement.

Operational Plan

Target Date

##### 1.4.3.1

Assess and identify opportunities for new service with scalability.

Program Plan: OHC (OH)  
Program Plan: OHCP (OH)

June 24

##### 1.4.3.2

Provide financial staff support to programming departments developing business plans for new private pay services. (i.e., budget, costs analysis, pricing, etc..).

Finance MGT Plan (OH, G)

June 23

##### 1.4.3.3

Add one new billable service to Gilead's Outpatient Services (MOPC, Chester OPC, Farrell OPC or MHRC).

Executive Plan (G)

June 23

##### 1.4.3.4

Reevaluate barriers to implementing private pay in-home case management and recovery support services at Gilead and determine viability moving forward.

Clinical Program Plan (G)

June 22

##### 1.4.3.5

Develop one viable business plan for one new private pay service.

Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

##### 1.4.3.6

Develop a business plan to increase utilization and profitability of Camp Hemlocks.

Executive Plan (OH)

June 22



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### 1.4 Service Innovation: Develop, modify, and expand services to meet evolving community needs and ensure their long-term sustainability.

1.4.4	Each program will develop an expansion proposal which senior leadership will evaluate for viability.	Operational Plan	Target Date
1.4.4.1	Generate and devise collaborative program expansion through Senior Program Leadership meetings.	Program Plan: OHC (OH)	June 24
1.4.4.2	Research costs vs potential revenue and demand for expanded services to identify potential long-term positive financial impact on the organization.	Finance MGT Plan (OH, G)	June 23
1.4.4.3	Develop a rough program expansion proposal for each Gilead Clinical Department to evaluate for viability.	Clinical Program Plan (G)	June 23
1.4.4.4	Evaluate all program expansion proposals and move forward with at least one new proposal, if viable.	Executive Plan (G)	June 23
1.4.4.5	Review program expansion concepts at least quarterly through the Senior Program Leadership Team Meetings.	Executive Plan (OH)	June 22

## 1. Community Access & Connection

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### 1.4 Service Innovation: Develop, modify, and expand services to meet evolving community needs and ensure their long-term sustainability.

1.4.5	Develop strategies to ameliorate barriers to access including physical and cultural barriers.	Operational Plan	Target Date
1.4.5.1	Develop methods to increase the people we serve's knowledge and understanding of available services.	Accessibility Plan (OH, G)	June 23
1.4.5.2	Develop an improved transportation program that includes gathering data, aligning Gilead and Oak Hill fleet management, establishing a semi-annual maintenance program and increasing efficiencies of fleet utilization.	Facilities Plan (OH) Facilities Plan (G) Accessibility Plan (OH, G)	June 24
1.4.5.3	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Accessibility Plan (OH, G)	June 24
1.4.5.4	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Facilities Plan (OH, G) Accessibility Plan (OH, G)	June 23
1.4.5.5	Develop methods to increase staff knowledge and understanding of programmatic service offerings that are available throughout all 3 organizations.	HR Plan (OH, G)	June 23
1.4.5.6	Research grant opportunities to fund cultural competency initiative.	HR Plan (OH) Development Plan (OH)	June 22
1.4.5.7	Develop strategies to communicate with populations who may not ordinarily feel comfortable accessing mental health services.	Cultural Competency Plan (G)	June 24

## 1. Community Access & Connection

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### 1.5 Community Outreach and Awareness: Enhance public awareness of the organizations' programs and services.

1.5.1	Determine clear outreach and communication goals based on mission-driven impact and return-on-investment evaluation.	p. 28
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1.5.2	Develop clear and effective messages.	p. 29
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1.5.3	Identify and leverage internal and external marketing opportunities.	p. 30
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# 1. Community Access & Connection

To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.

## 1.5 Community Outreach and Awareness: Enhance public awareness of the organizations' programs and services.

1.5.1	Determine clear outreach and communication goals based on mission-driven impact and return-on-investment evaluation.	Operational Plan	Target Date
1.5.1.1	Collaborate with Development and Program Departments to identify outreach and communication goals and methods to evaluate success towards those goals.	Quality Assurance Plan (OH, G)	June 23
1.5.1.2	Develop a communication plan that effectively communicates organizational impact to all stakeholders.	Development Plan (OH, G)	June 23

## 1. Community Access & Connection

To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.

### 1.5 Community Outreach and Awareness: Enhance public awareness of the organizations' programs and services.

1.5.2	Develop clear and effective messages.	Operational Plan	Target Date
1.5.2.1	Develop standards to ensure consistent external messaging.	Program Plan: OHC (OH, Clinical Program Plan (G) Executive Plan (OH) Development Plan (OH, G)	June 22
1.5.2.2	Develop marketing plan that will appropriately communicate to all stakeholders what we do and the scope of the program.	Program Plan: OHC (OH) Program Plan: OHS (OH) Clinical Program Plan (G) HR Plan (G) Executive Plan (OH) Development Plan (OH, G)	June 24
1.5.2.3	Create a partnership between the HR Department and the Development Department to expand our recruitment footprint by creating, promoting, and disseminating recruitment marketing materials.	HR Plan (OH, G)	June 23
1.5.2.4	Identify and add at least one new communication strategy to enhance the public's understanding of our services.	Executive Plan (G)	June 23

## 1. Community Access & Connection

To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.

### 1.5 Community Outreach and Awareness: Enhance public awareness of the organizations' programs and services.

1.5.3	Identify and leverage internal and external marketing opportunities.	Operational Plan	Target Date
1.5.3.1	Develop a mandatory training that ensures all employees understand the services that we offer and how they can be accessed.	Executive Plan (OH, G) Clinical Program Plan (G)	June 23
1.5.3.2	Identify programming across all three organizations in which a standardized referral and intake process could create synergies to improve program access and clarify outreach efforts.	Program Plan: OHC (OH) Clinical Program Plan (G) Executive Plan (OH)	June 24
1.5.3.3	Reach out to consumers and family members, especially younger parents, directly to share our service offerings and discuss their support needs.	Clinical Program Plan (G) Executive Plan (OH)	June 23
1.5.3.4	Develop standards and processes to ensure consistent internal messaging.	Program Plan: OHC (OH) HR Plan (OH)	June 22

## 1. Community Access & Connection

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<b>1.6</b>	<b>Community Advocacy:</b> Develop and enhance strategies to advocate for the people we serve.	
1.6.1	In coordination with our trade associations, develop and implement campaigns to educate the public and strategically influence public opinion and policy.	p. 32
1.6.2	Engage with other organizations, including those who may not be members of the CT Nonprofit Alliance, to leverage and coordinate broader advocacy efforts.	p. 33
1.6.3	Offer ongoing education and support for family members and friends on the importance of advocacy and how to do it.	p. 34
1.6.4	Work with marketing firms and lobbying firms to help with community advocacy efforts.	p. 35
1.6.5	Expand the current resource center model to meet the needs of additional populations and leverage for potential political advocacy.	p. 36

## 1. Community Access & Connection

To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.

### 1.6 Community Advocacy: Develop and enhance strategies to advocate for the people we serve.

1.6.1	In coordination with our trade associations, develop and implement campaigns to educate the public and strategically influence public opinion and policy.	Operational Plan	Target Date
1.6.1.1	Undertake a major public relations campaign to enable voters to understand the value of our nonprofit provided services.	Executive Plan (OH)	June 22
1.6.1.2	Develop and implement a strategy to increase voter and legislator awareness of the importance of adequate state funding of programs for the individuals we serve.	Executive Plan (OH)	June 22
1.6.1.3	Explore access and coordination with advocacy resources through Oak Hill (Staff Position and Consultant Resource).	Executive Plan (G) Development Plan (OH, G)	June 23



# 1. Community Access & Connection

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## 1.6 Community Advocacy: Develop and enhance strategies to advocate for the people we serve.

1.6.2	Engage with other organizations, including those who may not be members of the CT Nonprofit Alliance, to leverage and coordinate broader advocacy efforts.	Operational Plan	Target Date
1.6.2.1	Utilize existing supporter database to communicate about various advocacy issues as needed.	Executive Plan (G)	June 22
1.6.2.2	Engage with the other CT Easterseals agencies.	Executive Plan (OH)	June 22

## 1. Community Access & Connection

To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.

### 1.6 Community Advocacy: Develop and enhance strategies to advocate for the people we serve.

1.6.3	Offer ongoing education and support for family members and friends on the importance of advocacy and how to do it.	Operational Plan	Target Date
1.6.3.1	Incorporate advocacy opportunities through in-person, electronic and print communications.	Program Plan: OHC (OH)	June 23
1.6.3.2	Develop and implement an Advocacy Training for staff and external stakeholders.	Executive Plan (G)	June 23
1.6.3.3	Partner with NAMI to offer parent support groups, to nurture relationship with NAMI, and to establish Gilead in Middletown as the regional chapter.	Clinical Program Plan (G)	June 24
1.6.3.4	Develop a process, through our rehab centers, to engage and train families on consumer advocacy.	Clinical Program Plan (G)	June 23
1.6.3.5	Create a Family Engagement Opportunity to educate families on the numerous ways they can invest in the organization's mission.	Development Plan (OH)	June 23
1.6.3.6	Integrate advocacy campaign messaging into the Communication Plan.	Development Plan (G)	June 22
1.6.3.7	Offer 1-2 public policy training sessions per year and provide access to other training opportunities as available.	Executive Plan (OH) Public Policy Plan (OH)	June 22

# 1. Community Access & Connection

To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.

## 1.6 Community Advocacy: Develop and enhance strategies to advocate for the people we serve.

1.6.4	Work with marketing firms and lobbying firms to help with community advocacy efforts.	Agency Plan	Target Date
1.6.4.1	Create clear advocacy goals and evaluate the best investment strategy to meet those goals (i.e. hire a social media staff person, work with marketing and lobbying firms, etc..).	Development Plan (OH, G)	June 24
1.6.4.2	Establish regular board advocacy committee meetings and leverage relationship with Gaffney Bennett Associates, Inc.	Executive Plan (OH)	June 22

# 1. Community Access & Connection

To serve people who could benefit from our services, we need to cultivate a close connection to community resources and develop strategies to improve access to the services they need. We need to ensure availability and accessibility of services, advocate for full support of those services, and promote community integration and education.

## 1.6 Community Advocacy: Develop and enhance strategies to advocate for the people we serve.

1.6.5	Expand the current resource center model to meet the needs of additional populations and leverage for potential political advocacy.	Operational Plan	Target Date
1.6.5.1	Develop a model for MHRC program replication in other parts of the state.	Executive Plan (G)	June 23
1.6.5.2	Identify one additional specific population (e.g., racial, ethnic or other demographic group) based on need and develop a strategy to address their mental health needs.	Clinical Program Plan (G)	June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

- |     |   |       |
|-----|---|-------|
| 2.1 | <b>Fiscal Evaluation - Existing Services:</b> Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact of existing services on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and the mission impact (“Key Factors”). | p. 38 |
| 2.2 | <b>Fiscal Evaluation - New Services:</b> Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and mission impact (the “Key Factors”).                           | p. 44 |
| 2.3 | <b>Fundraising:</b> Develop and expand fundraising culture to increase and diversify revenue.   | p. 49 |
| 2.4 | <b>Financial Competency:</b> Improve organizational financial competency by implementing data-driven best practices and improved procedures to evaluate and monitor the financial impact of decision-making.  | p. 56 |
| 2.5 | <b>Revenue Enhancement:</b> Identify and develop sustainable opportunities to diversify and enhance funding streams by capitalizing on our current and future assets, capabilities, and resources.  | p. 61 |

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

<b>2.1</b>	<b>Fiscal Evaluation - Existing Services:</b> Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact of existing services on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and the mission impact (“Key Factors”).	
<b>2.1.1</b>	Identify areas where we are expanding service delivery without expanded compensation. Examples include length of counseling session, services without contracts and services beyond contract reimbursement.	p. 39
<b>2.1.2</b>	At least annually, identify underfunded programs and explore possible alternate funding sources, including the investment in marketing resources needed to achieve defined financial metrics.	p. 40
<b>2.1.3</b>	Develop a business planning process/template that outlines prospective impact across the organization by referencing the Key Factors in any expansion or contraction of existing services.	p. 41
<b>2.1.4</b>	At least annually, perform a fiscal evaluation as a standard metric for evaluating each existing service/program; to be used in conjunction with assessment of program’s impact on mission.	p. 42
<b>2.1.5</b>	Develop an organization-wide process for evaluating grant opportunities for existing services.	p. 43

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

2.1	<b>Fiscal Evaluation - Existing Services:</b> Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact of existing services on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and the mission impact (“Key Factors”).		
2.1.1	Identify areas where we are expanding service delivery without expanded compensation. Examples include length of counseling session, services without contracts and services beyond contract reimbursement.	Operational Plan	Target Date
2.1.1.1	Hold team/ department meetings to identify unpaid services and research other funding mechanisms (e.g., Grants, Contracts, Fundraising, etc..) to help pay for these needed services. Additional discussions around rate settings can also be held.	Program Plan: OHCP (OH) Finance MGT Plan (OH, G)	June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.1

**Fiscal Evaluation - Existing Services:** Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact of existing services on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and the mission impact (“Key Factors”).

#### 2.1.2

At least annually, identify underfunded programs and explore possible alternate funding sources, including the investment in marketing resources needed to achieve defined financial metrics.

Operational Plan

Target Date

##### 2.1.2.1

Utilize the annual budget process to help identify other funding mechanisms.

Program Plan: OHC (OH)  
Clinical Program Plan (G)

June 22

##### 2.1.2.2

Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.

Finance MGT Plan (OH, G)  
Risk MGT Plan (OH, G)

June 23



## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.1

**Fiscal Evaluation - Existing Services:** Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact of existing services on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and the mission impact (“Key Factors”).

#### 2.1.3

Develop a business planning process/template that outlines prospective impact across the organization by referencing the Key Factors in any expansion or contraction of existing services.

Operational Plan

Target Date

##### 2.1.3.1

Convene key program staff to complete business planning.

Program Plan: OHC (OH),  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

##### 2.1.3.2

Assess existing services to ensure they align with current market need.

Finance MGT Plan (OH, G)

June 23

##### 2.1.3.3

Use data from the evaluation process to assess the need for marketing investment and if relevant incorporate into the business plan.

Development Plan (OH, G)

June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.1

**Fiscal Evaluation - Existing Services:** Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact of existing services on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and the mission impact (“Key Factors”).

#### 2.1.4

At least annually, perform a fiscal evaluation as a standard metric for evaluating each existing service/program; to be used in conjunction with assessment of program’s impact on mission.

Operational Plan

Target Date

##### 2.1.4.1

Collaborate with other departments to provide billing audits or other applicable reporting to support fiscal evaluation efforts.

Quality Assurance Plan (OH, G)

June 23

##### 2.1.4.2

Continually review staffing needs and effectiveness for optimal service delivery and fiscal viability.

Program Plan: OHS (OH)  
Program Plan: OHCP (OH)

June 23

##### 2.1.4.3

Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.

Program Plan: OHCP (OH)  
Finance MGT Plan (OH, G)

June 24

##### 2.1.4.4

Develop a process for evaluating the need to reduce or discontinued unfunded or underfunded services as needed.

Finance MGT Plan (OH, G)

June 24

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.1

**Fiscal Evaluation - Existing Services:** Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact of existing services on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and the mission impact (“Key Factors”).

#### 2.1.5

Develop an organization-wide process for evaluating grant opportunities for existing services.

Operational Plan

Target Date

##### 2.1.5.1

Provide data on fiscally underperforming programs, or potential expanding services to assist in the grant evaluation process.

Finance MGT Plan (OH, G)

June 23

##### 2.1.5.2

Use data from the evaluation process to assess the need for grant funding and if relevant incorporate into the business plan.

Development Plan (G)

June 24

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.2

**Fiscal Evaluation - New Services:** Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and mission impact (the “Key Factors”).

#### 2.2.1

When identifying new programming, explore possible alternate funding sources, including the investment in marketing resources needed to achieve the metrics defined in the profitability index/return on investment analysis.

p. 45

#### 2.2.2

Develop an organization-wide grant evaluation process for new services.

p. 46

#### 2.2.3

Create a profitability index/return on investment analysis as a standard metric for evaluating the fiscal health and viability of any new service/program; to be considered in conjunction with an assessment of such service’s mission impact.

p. 47

#### 2.2.4

Develop a business planning process/template that outlines prospective impact across the organization by referencing the Key Factors in any implementation of new programs or initiatives.

p. 48

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.2

**Fiscal Evaluation - New Services:** Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and mission impact (the “Key Factors”).

#### 2.2.1

When identifying new programming, explore possible alternate funding sources, including the investment in marketing resources needed to achieve the metrics defined in the profitability index/return on investment analysis.

#### Operational Plan

#### Target Date

##### 2.2.1.1

Based on market need and funding opportunities, business planning will be conducted to determine fiscal viability of new services and the presence of any gap in services. (e.g., New Haven, Bridgeport, New London).

Program Plan: OHC (OH,  
Program Plan: OHS (OH)  
Program Plan: OHCP (OH)

June 24

##### 2.2.1.2

With all new programming being considered, identify all possible funding methods (e.g., governmental, private insurance, private pay, private grants, etc.), or other pricing strategies to help determine fiscal viability.

Finance MGT Plan (OH, G)

June 23

##### 2.2.1.3

Use data from the evaluation process to assess the need for marketing investment and if relevant incorporate into the business plan

Development Plan (OH, G)

June 23

##### 2.2.1.4

Identify 3 potential new programming ideas with non-DMHAS funding sources.

Clinical Program Plan (G)

June 24

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.2

**Fiscal Evaluation - New Services:** Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and mission impact (the “Key Factors”).

#### 2.2.2

Develop an organization-wide grant evaluation process for new services.

Operational Plan

Target Date

##### 2.2.2.1

Provide financial data to determine any gaps in funding to assist in the grant evaluation process.

Finance MGT Plan (OH, G)

June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.2

**Fiscal Evaluation - New Services:** Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and mission impact (the “Key Factors”).

#### 2.2.3

Create a profitability index/return on investment analysis as a standard metric for evaluating the fiscal health and viability of any new service/program; to be considered in conjunction with an assessment of such service’s mission impact.

Operational Plan

Target Date

##### 2.2.3.1

Determine key performance indicators for each service type which will allow us to analyze mission and impact.

Program Plan: OHC (OH)  
Program Plan: OHS (OH)  
Program Plan: OHCP (OH)

June 22

##### 2.2.3.2

Determine key performance indicators for each service type which will allow us to analyze profitability and return on investment.

Program Plan: OHCP (OH)  
Finance MGT Plan (OH, G)

June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.2

**Fiscal Evaluation - New Services:** Prior to any expansion or contraction of existing services, develop and implement a process to evaluate the impact on the people we serve, the service need, marketing investment required, applicable funding rates and methodology, overall fiscal viability and mission impact (the “Key Factors”).

2.2.4	Develop a business planning process/template that outlines prospective impact across the organization by referencing the Key Factors in any implementation of new programs or initiatives.	Operational Plan	Target Date
2.2.4.1	Establish a core business planning team that will evaluate and select the most appropriate tool to be utilized with all new business needs.	Executive Plan (OH)	June 23
2.2.4.2	Participate in a multi-department business planning process by applying analytical financial research and studies to provide financial data to assist the decision-making process.	Program Plan: OHCP (OH) Finance MGT Plan (OH, G)	June 23
2.2.4.3	Participate in the business planning process if marketing has been prioritized as a fiscally prudent investment.	Development Plan (OH, G)	June 23



## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.3 Fundraising: Develop and expand fundraising culture to increase and diversify revenue.

**2.3.1** Strengthen the organizations' Annual Giving Programs. p. 50

**2.3.2** Create Oak Hill and Easterseals major donor and planned giving programs and strengthen Gilead's existing major donor and planned giving programs. p. 51

**2.3.3** Develop an events strategy for Oak Hill and Easterseals and strengthen Gilead's existing events strategy. p. 52

**2.3.4** Create a grants structure to meet all the needs of the organizations. p. 53

**2.3.5** Examine the philanthropic efforts on the investment, growth, and utilization of the endowment funds. p. 54

**2.3.6** Create a culture where organizational stakeholders at all levels understand the impact of philanthropy and the vital role they play in the organizations' success. p. 55

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.3

**Fundraising:** Develop and expand fundraising culture to increase and diversify revenue.

#### 2.3.1

Strengthen the organizations' Annual Giving Programs.

Operational Plan

Target Date

2.3.1.1	Create opportunities for donors at all economic levels.	Executive Plan (OH)	June 22
2.3.1.2	Engage grateful parents to share their stories with potential donors.	Executive Plan (OH)	June 22
2.3.1.3	Offer symposia to existing donors on exciting state of the art activities and coming attractions in our field to invite feedback and discussion.	Executive Plan (OH)	June 22
2.3.1.4	Evaluate the need for additional resources on the Development Team in order to strategically advance our Annual Giving.	Executive Plan (G)	June 23
2.3.1.5	Become familiar with our existing donors and their knowledge of and investment in our mission.	Development Plan (OH, G)	June 24
2.3.1.6	Create and provide engagement opportunities for existing and prospective donors that communicate impact.	Development Plan (OH, G)	June 24
2.3.1.7	Prioritize donor renewal, retention and relationship building in all Annual Giving Program strategies.	Development Plan (OH, G)	June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.3

**Fundraising:** Develop and expand fundraising culture to increase and diversify revenue.

#### 2.3.2

Create Oak Hill and Easterseals major donor and planned giving programs and strengthen Gilead's existing major donor and planned giving programs.

Operational Plan

Target Date

##### 2.3.2.1

Appoint an advisory committee of Oak Hill and Gilead donors to explore strategies and procedures to expand fundraising capacity.

Executive Plan (OH)

June 22

##### 2.3.2.2

Capitalize on the knowledge gained through Annual Giving Program strategies to target specific donors to engage as prospective major donors.

Development Plan (OH, G)

June 23

##### 2.3.2.3

Create and provide engagement opportunities for existing and prospective major donors that communicate impact.

Development Plan (OH, G)

June 24

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.3

**Fundraising:** Develop and expand fundraising culture to increase and diversify revenue.

#### 2.3.3

Develop an events strategy for Oak Hill and Easterseals and strengthen Gilead's existing events strategy.

Operational Plan

Target Date

2.3.3.1

Educate the organization's stakeholders about events and the need to evaluate their return on investment.

Development Plan (OH)  
HR Plan (OH)  
IT Plan (OH)

June 24

2.3.3.2

Create an annual event calendar for all three organizations.

Development Plan (OH, G)

June 23

2.3.3.3

Evaluate Gilead's events strategy to determine return on investment.

Development Plan (G)

June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.3

**Fundraising:** Develop and expand fundraising culture to increase and diversify revenue.

#### 2.3.4

Create a grants structure to meet all the needs of the organizations.

Operational Plan

Target Date

##### 2.3.4.1

Evaluate the current grant structure and resources to determine whether changes need to be made to meet the demands of the entire organization.

Program Plan: OHCP (OH)  
Development Plan (OH, G)

June 24

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.3

**Fundraising:** Develop and expand fundraising culture to increase and diversify revenue.

#### 2.3.5

Examine the philanthropic efforts on the investment, growth, and utilization of the endowment funds.

Operational Plan

Target Date

##### 2.3.5.1

Collaborate with Finance Team to create an educational module about the organization's philanthropic history, financial growth and use of donor funds.

Development Plan (OH)

June 24

##### 2.3.5.2

Work with Finance Committee and Finance Team to review endowment investment strategy and growth goals.

Development Plan (G)

June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.3

**Fundraising:** Develop and expand fundraising culture to increase and diversify revenue.

2.3.6	Create a culture where organizational stakeholders at all levels understand the impact of philanthropy and the vital role they play in the organizations' success.	Operational Plan	Target Date
2.3.6.1	Engage the boards in routine outreach to thank existing donors at all levels.	Development Plan (G) Executive Plan (OH)	June 24
2.3.6.2	Raise donor awareness of organizational mission and service offerings.	Development Plan (G) Executive Plan (OH)	June 24
2.3.6.3	Develop list of ways by which internal stakeholders can contribute by highlighting events at the beginning of the year.	Program Plan: OHCP (OH) HR Plan (OH, G)	June 23
2.3.6.4	Develop a training for all employees that highlights the history and role of philanthropy, cultivates positive engagement and nurtures a culture of thankfulness and recognition, beginning with New Employee Orientation.	Program Plan: OHCP (OH) Executive Plan (OH, G) Development (OH, G) HR Plan (OH, G)	June 23
2.3.6.5	Maintain and strengthen board and leadership knowledge of and role in creating a culture of philanthropy within the organization.	Development Plan (OH)	June 24

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

2.4	<b>Financial Competency:</b> Improve organizational financial competency by implementing data-driven best practices and improved procedures to evaluate and monitor the financial impact of decision-making.	
2.4.1	Enhance monthly billing audits and training.	p. 57
2.4.2	Develop a financial education program for organizational leaders and staff, including an understanding of how the different services/programs are funded, and how fundraising impacts the budget.	p. 58
2.4.3	Meet monthly with department heads to review monthly budget to actual financial reports and request responses to variances based upon agreed upon metrics.	p. 59
2.4.4	Provide targeted data analytics to department heads to assist in decision-making and to identify positive or negative trends.	p. 60



## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.4

**Financial Competency:** Improve organizational financial competency by implementing data-driven best practices and improved procedures to evaluate and monitor the financial impact of decision-making.

#### 2.4.1

Enhance monthly billing audits and training.

Operational Plan

Target Date

2.4.1.1

Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.

Program Plan: OHCP (OH)  
Quality Assurance Plan (OH, G)  
HR Plan (OH)

June 23

2.4.1.2

Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.

Quality Assurance Plan (OH, G)

June 23

2.4.1.3

Identify billing areas to monitor for lost revenue opportunities (e.g., day service authorizations vs. actual billed services).

Program Plan: OHCP (OH)  
Finance MGT Plan (OH, G)

June 22

2.4.1.4

Identify areas to monitor for revenue gain opportunities (e.g., productivity percentages for billable employees).

Finance MGT Plan (OH, G)  
Quality Assurance Plan (OH, G)

June 22

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.4

**Financial Competency:** Improve organizational financial competency by implementing data-driven best practices and improved procedures to evaluate and monitor the financial impact of decision-making.

#### 2.4.2

Develop a financial education program for organizational leaders and staff, including an understanding of how the different services/programs are funded, and how fundraising impacts the budget.

Operational Plan

Target Date

##### 2.4.2.1

Discuss with program leaders to help identify financial knowledge gaps with staff to help develop an appropriate training program that targets these needs.

Finance MGT Plan (OH, G)

June 22

##### 2.4.2.2

Implement a training program, across all levels of the organization (NEO, Management Training & program staff meetings).

Finance MGT Plan (OH, G)  
HR (OH, G)

June 22

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.4

**Financial Competency:** Improve organizational financial competency by implementing data-driven best practices and improved procedures to evaluate and monitor the financial impact of decision-making.

#### 2.4.3

Meet monthly with department heads to review monthly budget to actual financial reports and request responses to variances based upon agreed upon metrics.

Operational Plan

Target Date

##### 2.4.3.1

Determine financial key performance indicators (KPI) by service type.

Finance MGT Plan (OH, G)  
Program Plan: OHC (OH)  
Program Plan: OHS (OH)  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

##### 2.4.3.2

Review KPIs monthly and provide actionable steps if needed to the Finance Department.

Finance MGT Plan (OH, G)  
Program Plan: OHC (OH)  
Program Plan: OHS (OH)  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.4

**Financial Competency:** Improve organizational financial competency by implementing data-driven best practices and improved procedures to evaluate and monitor the financial impact of decision-making.

#### 2.4.4

Provide targeted data analytics to department heads to assist in decision-making and to identify positive or negative trends.

Operational Plan

Target Date

2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G) Finance MGT Plan (OH, G) Program Plan: OHC (OH) Program Plan: OHS (OH) Program Plan: OHCP (OH) Clinical Program Plan (G)	June 23
2.4.4.2	Shorten the investigation, decision-making, reporting and notification cycle to reduce time on administrative leave.	Program Plan: OHCP (OH) HR Plan (OH, G)	June 23
2.4.4.3	Explore a Lean Process study to identify appropriate level of training.	Program Plan: OHCP (OH) HR Plan (OH, G)	June 22
2.4.4.4	Implement training and recommendations from the Lean Process Study.	HR Plan (OH, G)	June 23
2.4.4.5	Create a metrics dashboard to measure cost related to HR functions such as workers comp and safety, labor/grievances, leave of absences, turnover. Report quarterly.	HR Plan (OH, G)	June 22
2.4.4.6	Implement a plan to improve the following areas; labor relations, safety, & employee engagement.	HR Plan (OH, G)	June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

2.5	<b>Revenue Enhancement:</b> Identify and develop sustainable opportunities to diversify and enhance funding streams by capitalizing on our current and future assets, capabilities, and resources.	
2.5.1	Review existing programs and assets to identify opportunities for utilization by private pay in addition to government funding.	p. 62
2.5.2	Explore current capabilities and resources and how internal skills and resources could be contracted out externally.	p. 63
2.5.3	Maximize billable revenue for each eligible program or service.	p. 64
2.5.4	Expand and implement statewide advocacy efforts to demand full funding of developmental disability and mental health services.	p. 65

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.5

**Revenue Enhancement:** Identify and develop sustainable opportunities to diversify and enhance funding streams by capitalizing on our current and future assets, capabilities, and resources.

#### 2.5.1

Review existing programs and assets to identify opportunities for utilization by private pay in addition to government funding.

Operational Plan

Target Date

##### 2.5.1.1

Identify two opportunities, per service type, for private pay services or government funded and explore the viability of pursuing those services, including financial analysis.

Clinical Program Plan (G)  
Program Plan: OHC (OH)  
Program Plan: OHS (OH)  
Program Plan: OHCP (OH)  
Finance MGT Plan (OH, G)

June 23

##### 2.5.1.2

Identify two opportunities to provide consulting services or administrative support services to other nonprofits, including financial analysis (e.g., training, group home maintenance, fiscal recordkeeping).

Finance MGT Plan (OH, G)  
HR Plan (OH, G)  
Facilities Plan (OH, G)

June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.5

**Revenue Enhancement:** Identify and develop sustainable opportunities to diversify and enhance funding streams by capitalizing on our current and future assets, capabilities, and resources.

#### 2.5.2

Explore current capabilities and resources and how internal skills and resources could be contracted out externally.

Operational Plan

Target Date

2.5.2.1

Consult financial experts with knowledge of non-profit finance management, third party billing, and revenue generation.

Program Plan: OHC (OH)  
Finance MGT Plan (OH, G)

June 23

2.5.2.2

Through business planning, evaluate the possibilities of new billable revenue opportunities (i.e., Outpatient Clinic in Hartford, Addiction Services in Middletown, etc..).

Program Plan: OHC (OH)  
Program Plan: OHS (OH)  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)  
Finance MGT Plan (OH, G)

June 23

2.5.2.3

Provide financial analysis on identified new revenue opportunities.

Finance MGT Plan (OH, G)

June 23

## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.5

**Revenue Enhancement:** Identify and develop sustainable opportunities to diversify and enhance funding streams by capitalizing on our current and future assets, capabilities, and resources.

#### 2.5.3

Maximize billable revenue for each eligible program or service.

Operational Plan

Target Date

##### 2.5.3.1

Through business planning, identify where marketing resources could help maximize revenue.

Program Plan: OHC (OH)  
Program Plan: OHS (OH)  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

##### 2.5.3.2

Perform lost revenue analysis on all programing/services currently being provided to help identify reasons or roadblocks to achieve maximum billing. Monitor and take action on productivity percentages vs established benchmarks and budgets.

Program Plan: OHCP (OH)  
Finance MGT Plan (OH, G)

June 23



## 2. Financial Sustainability

To create long-term financial stability and sustainability, the organizations need to manage funding streams, diversify funding streams, and ensure adequate rates for existing and new programs.

### 2.5

**Revenue Enhancement:** Identify and develop sustainable opportunities to diversify and enhance funding streams by capitalizing on our current and future assets, capabilities, and resources.

#### 2.5.4

Expand and implement statewide advocacy efforts to demand full funding of developmental disability and mental health services.

Operational Plan

Target Date

##### 2.5.4.1

Develop visitation plan with elected officials, public policy and appointed department heads.

Executive Plan (OH, G)

June 22

##### 2.5.4.2

Explore access and coordination with advocacy resources through Oak Hill (Staff Position and Lobbyist Resource).

Executive Plan (G)

June 23

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

3.1	<b>Shared Vision:</b> Develop and leverage each organization's unique brand, mission, and service offerings within a common shared vision.	p. 67
3.2	<b>Corporate Structure:</b> Conduct due diligence to explore legal options related to changes in corporate structure and administrative processes that would better support the shared vision of all three organizations.	p. 70
3.3	<b>Programs &amp; Processes:</b> Enhance collaboration, teamwork and efficiencies through the integration of programs and administrative processes, as appropriate, across all three organizations and among applicable departments.	p. 75
3.4	<b>Culture:</b> Internally and externally define and further cultivate the desired organizational culture with an emphasis on diversity, equity, and inclusion.	p. 79
3.5	<b>Expansion:</b> Develop a strategy to proactively evaluate and consider potential affiliations, mergers, and acquisitions to continually meet community needs and improve service delivery.	p. 84

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.1

**Shared Vision:** Develop and leverage each organization's unique brand, mission, and service offerings within a common shared vision.

##### 3.1.1

Engage the boards and administrative teams of all three organizations to create a shared vision statement.

p. 68

##### 3.1.2

Develop a comprehensive brand strategy by establishing brand objectives and guidelines for use of brands, understanding how they are perceived by the community and the people we serve.

p. 69

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.1

**Shared Vision:** Develop and leverage each organization's unique brand, mission, and service offerings within a common shared vision.

##### 3.1.1

Engage the boards and administrative teams of all three organizations to create a shared vision statement.

Operational Plan

Target Date

##### 3.1.1.1

Coordinate an annual leadership retreat to engage all 3 boards and all 3 leadership teams in vision development.

Executive Plan (OH, G)

June 23

##### 3.1.1.2

Create a process and timeline to examine, define, and differentiate the brands of all three organizations.

Development Plan (OH, G)

June 24

##### 3.1.1.3

Form an integrated committee by end FY22 consisting of Board Chairs, CEOs and Board members.

Executive Plan (OH, G)

June 22

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.1

**Shared Vision:** Develop and leverage each organization's unique brand, mission, and service offerings within a common shared vision.

#### 3.1.2

Develop a comprehensive brand strategy by establishing brand objectives and guidelines for use of brands, understanding how they are perceived by the community and the people we serve.

Operational Plan

Target Date

##### 3.1.2.1

Utilizing each brand's personality, purposes and points of difference, research and implement marketing plans, development plans and public relations campaigns to highlight brand and service offerings and impact.

Program Plan: OHC (OH,  
Executive Plan (OH)  
HR Plan (OH, G)

June 23

##### 3.1.2.2

Utilizing each brand's personality, purposes and points of difference, advance advocacy efforts collectively and separately, as appropriate.

Program Plan: OHC (OH)  
HR Plan (OH)  
Executive Plan (OH)

June 23

##### 3.1.2.3

Standardize the use of recruitment marketing materials and use them for recruitment fairs and hiring events.

HR Plan (OH, G)

June 22

##### 3.1.2.4

Develop a working budget, in coordination with relevant parties, to monitor internal and external costs related to brand development (e.g., consultants, third parties, personnel time, etc..).

Finance MGT Plan (OH, G)

June 23

##### 3.1.2.5

Involve stakeholders in discussion about existing brands, pros and cons of combined and or rebranding.

Development Plan (OH, G)

June 24

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.2

**Corporate Structure:** Conduct due diligence to explore legal options related to changes in corporate structure and administrative processes that would better support the shared vision of all three organizations.

##### 3.2.1

Evaluate corporate structure to integrate administrative functions and personnel deployment more effectively in a way that is most advantageous for all three organizations.

p. 71

##### 3.2.2

Explore and develop opportunities for utilizing human capital across all three organizations by sharing resources and talent and maximizing opportunities for employees.

p. 72

##### 3.2.3

Evaluate integration of administrative departments and infrastructure within reconsidered corporate structure.

p. 73

##### 3.2.4

Design opportunities for regular collaboration and cooperation among the Boards of Directors.

p. 74

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.2

**Corporate Structure:** Conduct due diligence to explore legal options related to changes in corporate structure and administrative processes that would better support the shared vision of all three organizations.

##### 3.2.1

Evaluate corporate structure to integrate administrative functions and personnel deployment more effectively in a way that is most advantageous for all three organizations.

Operational Plan

Target Date

##### 3.2.1.1

Collaborate with boards to identify a priority list of key factors that need to be established or maintained for an alternative corporate structure to be effective (e.g., the pillars document used during the affiliation discussion).

Executive Plan (OH, G)

June 23

##### 3.2.1.2

Clearly define the end goal of business operations to determine gaps in administrative functions.

IT Plan (G)

June 22

##### 3.2.1.3

Continue regular meetings between Gilead and Oak Hill. Consider merging processes where there is overlap and alignment.

IT Plan (OH)

June 24

##### 3.2.1.4

Evaluate departments with existing shared staffing between agencies, and further collaborate or integrate where appropriate to provide improved efficiencies and effectiveness.

Quality Assurance Plan (OH, G)

June 24

##### 3.2.1.5

Form a committee to explore changes in corporate structure.

Executive Plan (OH)

June 22

### 3. Organizational Integration

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#### 3.2

**Corporate Structure:** Conduct due diligence to explore legal options related to changes in corporate structure and administrative processes that would better support the shared vision of all three organizations.

##### 3.2.2

Explore and develop opportunities for utilizing human capital across all three organizations by sharing resources and talent and maximizing opportunities for employees.

Operational Plan

Target Date

##### 3.2.2.1

Create an effective process for inter-organization transfer to provide additional opportunities for personal and professional staff development and advancement.

HR Plan (OH, G)  
Program Plan: OHC (OH)

June 22

##### 3.2.2.2

Share vendors across departments, where appropriate.

Facilities Plan (G)

June 24

##### 3.2.2.3

Consider restructuring current responsibilities or improve cross-training to enable staff to better support all departments.

Finance MGT Plan (OH, G)

June 23

##### 3.2.2.4

Identify and integrate at least 3 key functions within each of the administrative departments.

HR Plan (OH, G)  
Executive Plan (OH)

June 22



### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.2

**Corporate Structure:** Conduct due diligence to explore legal options related to changes in corporate structure and administrative processes that would better support the shared vision of all three organizations.

#### 3.2.3

Evaluate integration of administrative departments and infrastructure within reconsidered corporate structure.

Operational Plan

Target Date

##### 3.2.3.1

Explore the integration of existing and new meetings and committees for programmatic, administrative, and training purposes, where appropriate.

Facilities Plan (G)  
HR Plan (OH, G)  
Executive Plan (OH)

June 24

##### 3.2.3.2

Implement technological tools and systems across all three organizations to improve collaboration and improve efficiencies.

IT Plan (OH)  
Executive Plan (OH)  
Facilities Plan (OH, G)

June 24

##### 3.2.3.3

Create a reporting tool that will document the areas of integration between/among departments.

HR Plan (OH, G)

June 23

##### 3.2.3.4

Develop integration plans based on integration initiative goals and long-term future intentions.

IT Plan (G)  
Development Plan (OH, G)

June 23

##### 3.2.3.5

Identify facility trainings that can be shared across departments and apply them to the appropriate training platform as needed.

Facilities Plan (G)

June 24

##### 3.2.3.6

Develop recommendations for targeted area where Work Order system could benefit the entire organization.

Facilities Plan (OH, G)

June 23

##### 3.2.3.7

Complete an assessment of existing administrative integration including future recommendations.

Executive Plan (G)

June 23

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.2

**Corporate Structure:** Conduct due diligence to explore legal options related to changes in corporate structure and administrative processes that would better support the shared vision of all three organizations.

#### 3.2.4

Design opportunities for regular collaboration and cooperation among the Boards of Directors.

Operational Plan

Target Date

##### 3.2.4.1

Conduct at least one "combined" board meeting annually.

Executive Plan (G)

June 23

##### 3.2.4.2

Create opportunities to collaborate using internal and external resources (such as SERC).

Development Plan (OH)

June 24

##### 3.2.4.3

Develop timeline and plan a retreat on governance or EDI work during FY22-23.

Executive Plan (OH)

June 22

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.3

**Programs & Processes:** Enhance collaboration, teamwork and efficiencies through the integration of programs and administrative processes, as appropriate, across all three organizations and among applicable departments.

##### 3.3.1

Integrate programs and referral processes across all three agencies where possible.

p. 76

##### 3.3.2

Maintain and further capitalize on a formal, centralized program team.

p. 77

##### 3.3.3

Implement the integrated project priorities that have been identified by the Senior Program Leadership Team.

p. 78

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.3

**Programs & Processes:** Enhance collaboration, teamwork and efficiencies through the integration of programs and administrative processes, as appropriate, across all three organizations and among applicable departments.

3.3.1	Integrate programs and referral processes across all three agencies where possible.	Operational Plan	Target Date
3.3.1.1	Develop a streamlined referral process across all three agencies, where possible.	Program Plan: OHC (OH) Program Plan: OHCP (OH) Clinical Program Plan (G)	June 23
3.3.1.2	Evaluate where synergies may exist among current service offerings to ensure seamless service delivery between all programs, education, residential, Oak hill Centers, and Gilead, as evidenced in inclusive services aligned with our mission.	Program Plan: OHC (OH) Program Plan: OHCP (OH) Clinical Program Plan (G)	June 23
3.3.1.3	Assess opportunities for shared resources/staffing.	Program Plan: OHC (OH) Program Plan: OHCP (OH) Clinical Program Plan (G)	June 23

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.3

**Programs & Processes:** Enhance collaboration, teamwork and efficiencies through the integration of programs and administrative processes, as appropriate, across all three organizations and among applicable departments.

3.3.2	Maintain and further capitalize on a formal, centralized program team.	Operational Plan	Target Date
3.3.2.1	Explore opportunities to create new programs that integrate the services and resources of the affiliated organizations.	Program Plan: OHC (OH) Program Plan: OHS (OH) Program Plan: OHCP (OH) Clinical Program Plan (G) Executive Plan (OH)	June 24
3.3.2.2	Provide thorough education about the organization's programs and services to upper and middle management.	Program Plan: OHC (OH) Program Plan: OHCP (OH) Clinical Program Plan (G) Executive Plan (OH)	June 23
3.3.2.3	Explore feasibility of partnering with a residential program to develop a high quality residential/educational program to meet identified referral needs.	Program Plan: OHS (OH) Program Plan: OHCP (OH)	June 24
3.3.2.4	Develop a collaborative programmatic team that includes "middle managers" from all 3 agencies.	Program Plan: OHCP (OH) Executive Plan (G)	June 23

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.3

**Programs & Processes:** Enhance collaboration, teamwork and efficiencies through the integration of programs and administrative processes, as appropriate, across all three organizations and among applicable departments.

##### 3.3.3

Implement the integrated project priorities that have been identified by the Senior Program Leadership Team.

Operational Plan

Target Date

##### 3.3.3.1

Develop a project description and action plan for each of the project priorities that have been identified by the integrated Senior Program Leadership Team.

Program Plan: OHCP (OH)  
Executive Plan (OH, G)

June 22

##### 3.3.3.2

Identify a project lead and targeted completion date for each of the identified priorities, in partnership with the Oak Hill and Gilead Executive Leadership Team.

Program Plan: OHCP (OH)  
Executive Plan (OH, G)

June 23

##### 3.3.3.3

Evaluate the financial investment required for each of the identified priority along with a projected future financial impact for the organization.

Executive Plan (OH, G)

June 23

### 3. Organizational Integration

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3.4	<b>Culture:</b> Internally and externally define and further cultivate the desired organizational culture with an emphasis on diversity, equity, and inclusion.	
3.4.1	Provide opportunities for staff from across the organizations to develop collaborative rapport.	p. 80
3.4.2	Develop, adopt, publish, and reiterate a statement of values common to all three organizations.	p. 81
3.4.3	Develop or enhance organizational plans that implement targeted strategies to enhance diversity, equity, inclusion, and access to services.	p. 82
3.4.4	Embrace an "esprit des corps" throughout the organizations in which employees understand their roles in fulfilling our mission and how they impact our relationships in the community and with the people we serve.	p. 83

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.4

**Culture:** Internally and externally define and further cultivate the desired organizational culture with an emphasis on diversity, equity, and inclusion.

##### 3.4.1

Provide opportunities for staff from across the organizations to develop collaborative rapport.

Operational Plan

Target Date

##### 3.4.1.1

Implement at least one organization-wide event that allows staff from all programs to develop collaborative rapport.

HR Plan (OH, G)  
Program Plan: OHC (OH)  
Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 24

##### 3.4.1.2

Develop a pilot meeting, like Gilead's clinical rounds, that includes members across all three organizations to address the people we serve's shared issues and needs.

Clinical Program Plan (G)

June 23



### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.4

**Culture:** Internally and externally define and further cultivate the desired organizational culture with an emphasis on diversity, equity, and inclusion.

##### 3.4.2

Develop, adopt, publish, and reiterate a statement of values common to all three organizations.

Operational Plan

Target Date

##### 3.4.2.1

Identify the customs, beliefs, and values of each organization.

HR Plan (OH)  
Executive Plan (OH)

June 22

##### 3.4.2.2

Integrate the concepts of justice, access and serving the whole person as part of each organization's core values.

HR Plan (G)  
Executive Plan (OH)

June 22

##### 3.4.2.3

Work with SERC (State Education Resource Center of CT; DEI Consultant) to develop revised organizational core values.

Development Plan (OH, G)

June 24

##### 3.4.2.4

Coordinate an annual leadership retreat to engage all 3 boards and all 3 leadership teams in vision development (same as 3.1.1.1).

Executive Plan (G)

June 23

### 3. Organizational Integration

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3.4	<b>Culture:</b> Internally and externally define and further cultivate the desired organizational culture with an emphasis on diversity, equity, and inclusion.		
3.4.3	Develop or enhance organizational plans that implement targeted strategies to enhance diversity, equity, inclusion, and access to services.	Operational Plan	Target Date
3.4.3.1	Implement internal survey and evaluation strategies with specific questions designed to assess the organizational culture as it relates to diversity, equity, and inclusion.	HR Plan (OH, G) Program Plan: OHC (OH) Cultural Competency Plan (G)	June 24
3.4.3.2	Develop and implement at least one event within the organization that is intentionally designed to celebrate the importance of diversity, equity, and inclusion.	HR Plan (OH, G) Program Plan: OHC (OH) Cultural Competency Plan (G)	June 24
3.4.3.3	Underscore the importance of a common culture of learning by offering internal and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH, G) Program Plan: OHC (OH) Program Plan: OHCP (OH, Cultural Competency Plan (G)	June 24
3.4.3.4	Underscore the importance of a common culture of learning by offering internal training that can be accessed by employees of both organizations and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH)	June 24
3.4.3.5	Execute action planning recommendations from Gilead and Oak Hill's DEI consultants into actionable targets and specific timeframes.	Cultural Competency Plan (OH, G)	June 23

### 3. Organizational Integration

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#### 3.4

**Culture:** Internally and externally define and further cultivate the desired organizational culture with an emphasis on diversity, equity, and inclusion.

#### 3.4.4

Embrace an "esprit des corps" throughout the organizations in which employees understand their roles in fulfilling our mission and how they impact our relationships in the community and with the people we serve.

Operational Plan

Target Date

#### 3.4.4.1

Create or enhance an outreach strategy that both cultivates internal relationships, captures impact and illustrates by example each employee's role within our rich history of philanthropy.

Development Plan (OH, G)

June 24

#### 3.4.4.2

Add a goal regarding our mission to the performance evaluation tool.

HR Plan (OH)

June 24

### 3. Organizational Integration

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#### 3.5

**Expansion:** Develop a strategy to proactively evaluate and consider potential affiliations, mergers, and acquisitions to continually meet community needs and improve service delivery.

##### 3.5.1

Develop a detailed vision for growth, including a gap analysis of our existing continuum of care and analysis of service trends related to our geographic, demographic, and programmatic service goals.

p. 85

##### 3.5.2

Implement a process to identify prospective partners.

p. 86

##### 3.5.3

Create opportunities to develop relationships that may lead to potential collaboration or partnership.

p. 87

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.5

**Expansion:** Develop a strategy to proactively evaluate and consider potential affiliations, mergers, and acquisitions to continually meet community needs and improve service delivery.

3.5.1	Develop a detailed vision for growth, including a gap analysis of our existing continuum of care and analysis of service trends related to our geographic, demographic, and programmatic service goals.	Operational Plan	Target Date
3.5.1.1	Develop criteria and methodology to evaluate potential partners/affiliations/mergers for fiscal viability. Perform a SWOT analysis focused on financial performance of these potential providers.	Finance MGT Plan (OH, G) Risk MGT Plan (OH, G)	June 23
3.5.1.2	Identify and Develop Gilead and OH's growth vision for the next 3-6 years (2 strategic plan cycles).	Executive Plan (OH, G)	June 23
3.5.1.3	Develop process and methodology for annual implementation of ANCOR initiatives.	HR Plan (OH)	June 22
3.5.1.4	Hold blue sky retreat in FY23.	Executive Plan (OH)	June 23
3.5.1.5	Leverage current survey development tools in QA to survey payers and the people we serve of services wanted as part of satisfaction survey.	Executive Plan (OH)	June 22
3.5.1.6	Develop format and methodology for senior managers to report back on National trends.	Executive Plan (OH)	June 22

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

#### 3.5

**Expansion:** Develop a strategy to proactively evaluate and consider potential affiliations, mergers, and acquisitions to continually meet community needs and improve service delivery.

3.5.2	Implement a process to identify prospective partners.	Operational Plan	Target Date
3.5.2.1	Develop format and methodology for identifying potential third party brokers who could facilitate collaborative arrangements.	Executive Plan (OH)	June 22
3.5.2.2	Develop format and methodology for conducting a service delivery SWOT to identify potential needs for partners/affiliations/mergers.	Executive Plan (OH, G)	June 23
3.5.2.3	Develop a format and methodology for reviewing publicly available financial data of prospective partners identified.	Finance MGT Plan (OH, G) Risk MGT Plan (OH, G)	June 23
3.5.2.4	Evaluate any and all financial impacts of existing and/or future affiliations such as cost saving opportunities, tax/audit, treasury, or credit implications and entity related government filings.	Finance MGT Plan (OH, G)	June 23

### 3. Organizational Integration

Oak Hill, Gilead Community Services, and Easterseals operate as three separate organizations. Integrating our programs, services, and administrative processes, while maintaining our individual identities where appropriate, will enable us to grow through collaboration and leverage our existing skills and resources to further benefit the people we serve, our staff, and our communities.

3.5	<b>Expansion:</b> Develop a strategy to proactively evaluate and consider potential affiliations, mergers, and acquisitions to continually meet community needs and improve service delivery.		
3.5.3	Create opportunities to develop relationships that may lead to potential collaboration or partnership.	Operational Plan	Target Date
3.5.3.1	Develop criteria and timeline to initiate contact with at least one external agency to explore the potential for an affiliation, merger or acquisition that would further expand the continuum of care offered by the organization.	Executive Plan (OH)	June 22
3.5.3.2	Develop criteria and timeline to participate in at least one training, event or activity with other agencies to explore the potential for collaboration or partnership.	Executive Plan (OH, G) Development Plan (G)	June 23
3.5.3.3	Evaluate the efficacy of, and then approach, the professional medical and health insurance communities, and state government agencies to become the go-to partner to provide essential services.	Executive Plan (OH)	June 22
3.5.3.4	Identify appropriate group to educate the Development Team about Oak Hill's desire to continue to partner with organizations looking for affiliation opportunities.	Development Plan (OH, G)	June 23
3.5.3.5	Evaluate corporate structure in order to facilitate affiliations that advance the organization's mission.	HR Plan (OH, G) Facilities Plan (OH) Executive Plan (OH)	June 23
3.5.3.6	Create a written plan resulting from the evaluation of a corporate structure in order to facilitate affiliations that advance the organization's mission.	HR Plan (OH)	June 23

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

4.1

**Culture of Belonging:** Expand diversity and inclusion practices to create a culture of belonging and enhance productivity, innovation, and collaboration.

p. 89

4.2

**Address Stigma:** Address cultural stigmas within the people served to elevate access to adequate healthcare.

p. 93

4.3

**Economic Barriers:** Identify economic barriers that limit access and opportunities for our staff and the people we serve and seek solutions to help overcome challenges of scarcity.

p. 97

4.4

**Inclusive Communication:** Improve and diversify communication methods to overcome language barriers and accommodate varying communication styles.

p. 101

4.5

**Recruitment and Retention:** Identify and implement strategies for improved recruitment and retention of diverse populations that reflect the communities we serve.

p. 105



## 4. Transforming through Diversity

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4.1	<b>Culture of Belonging:</b> Expand diversity and inclusion practices to create a culture of belonging and enhance productivity, innovation, and collaboration.	
4.1.1	Develop clear and consistent messaging that communicates the organization's' collective commitment to diversity, equity, inclusion and access to services.	p. 90
4.1.2	Engage the board, staff, people we serve, and community in ongoing education, discussion, and reflection on the organizations' DEI plans and activities.	p. 91
4.1.3	Develop a process for ongoing evaluation and strategy development related to enhancing diversity, equity, and inclusion within the culture of the organizations.	p. 92

## 4. Transforming through Diversity

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### 4.1

**Culture of Belonging:** Expand diversity and inclusion practices to create a culture of belonging and enhance productivity, innovation, and collaboration.

#### 4.1.1

Develop clear and consistent messaging that communicates the organization's collective commitment to diversity, equity, inclusion and access to services.

#### Operational Plan

#### Target Date

##### 4.1.1.1

Create and communicate organizational definition of diversity, equity, and inclusion.

Program Plan: OHC (OH)  
Program Plan: OHS (OH)  
HR Plan (OH, G)

June 24

##### 4.1.1.2

Create and communicate, internally and externally, a vision statement to promote a culture of inclusion.

Program Plan: OHC (OH)  
Program Plan: OHS (OH)  
HR Plan (OH, G)  
Executive Plan (G)

June 24

##### 4.1.1.3

Review and update language, including forms and documents, policy, treatment planning, etc., to reflect an open and affirming culture of inclusion.

Program Plan: OHCP (OH)  
Clinical Program Plan (G)

June 23

## 4. Transforming through Diversity

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### 4.1

**Culture of Belonging:** Expand diversity and inclusion practices to create a culture of belonging and enhance productivity, innovation, and collaboration.

#### 4.1.2

Engage the board, staff, people we serve, and community in ongoing education, discussion, and reflection on the organizations' DEI plans and activities.

Operational Plan

Target Date

##### 4.1.2.1

Create a staff and a management training to strengthen a diversity, equity and inclusion focus that emphasizes anti-biased strategies across the organization.

HR Plan (OH, G)  
Executive Plan (OH, G)

June 23

##### 4.1.2.2

Utilize external training resources as needed to enhance supervisory skills that foster trust and belonging for all staff.

Program Plan: OHC (OH)  
Program Plan: OHS (OH)  
HR Plan (OH, G)  
Executive Plan (OH)

June 23

##### 4.1.2.3

Develop and implement professional learning on key principles of equity and social justice that will align with the organization's vision and mission for development and growth.

Program Plan: OHS (OH)

June 24

##### 4.1.2.4

Identify and integrate educational materials regarding DEI strategies.

Clinical Program Plan (G)

June 24

##### 4.1.2.5

Host at least one event that educates staff about others' cultures, with the potential for recurring future events.

HR Plan (OH)

June 23

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

### 4.1

**Culture of Belonging:** Expand diversity and inclusion practices to create a culture of belonging and enhance productivity, innovation, and collaboration.

#### 4.1.3

Develop a process for ongoing evaluation and strategy development related to enhancing diversity, equity, and inclusion within the culture of the organizations.

Operational Plan

Target Date

##### 4.1.3.1

Conduct yearly reviews of diversity of workforce compared to diversity of Connecticut and the relevant geographical area.

HR Plan (OH, G)  
Executive Plan (OH, G)

June 22

##### 4.1.3.2

Conduct yearly reviews of diversity of population served compared to diversity of Connecticut or relevant geographical area.

Quality Assurance Plan (OH, G)  
Clinical Program Plan (G)  
HR Plan (OH)  
Executive Plan (OH)

June 23

##### 4.1.3.3

Explore strategies that can be implemented during the training process that will promote employee retention.

HR Plan (OH)  
Executive Plan (OH)

June 23

##### 4.1.3.4

Conduct quarterly reviews that demonstrate the diversity within the supervisory ranks.

HR Plan (OH, G)

June 23

##### 4.1.3.5

Work with SERC to identify status of DEI initiative at least annually.

Executive Plan (G)

June 22

## 4. Transforming through Diversity

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4.2	<b>Address Stigma:</b> Address cultural stigmas within the people served to elevate access to adequate healthcare.	
4.2.1	Investigate data related to the effect of stigma and formulate programs using existing skills and resources to educate stakeholders on the effects and costs of stigma.	p. 94
4.2.2	Implement an internally focused educational curriculum focused on awareness of the people we serve, including misconceptions and stigma.	p. 95
4.2.3	Implement an externally focused educational curriculum focused on awareness of populations served, including misconceptions and stigma.	p. 96

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

### 4.2 Address Stigma: Address cultural stigmas within the people served to elevate access to adequate healthcare.

4.2.1	Investigate data related to the effect of stigma and formulate programs using existing skills and resources to educate stakeholders on the effects and costs of stigma.	Operational Plan	Target Date
4.2.1.1	Integrate the need to educate around stigma into the Outreach and Communication Plans.	Development Plan (OH, G)	June 24
4.2.1.2	Identify and review at least two sources of data (e.g., drug companies, Boston University, etc..).	Clinical Program Plan (G)	June 23
4.2.1.3	Implement the cultural competency training through Professional Development.	HR Plan (OH)	June 22
4.2.1.4	Integrate the issue of inadequate access to healthcare into the advocacy messaging campaign.	Development Plan (OH, G)	June 24
4.2.1.5	Create a simple one-page fact sheet to share with stakeholders and community members.	Clinical Program Plan (G)	June 24
4.2.1.6	Work with SERC to create EDI training programs for staff.	HR Plan (OH)	June 23

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

### 4.2 Address Stigma: Address cultural stigmas within the people served to elevate access to adequate healthcare.

4.2.2	Implement an internally focused educational curriculum focused on awareness of the people we serve, including misconceptions and stigma.	Operational Plan	Target Date
4.2.2.1	Provide disability awareness educational content regarding physical and digital accessibility.	Program Plan: OHC (OH)	June 23
4.2.2.2	Develop a curriculum to address bias and stigma and train staff on how to implement curriculum.	Clinical Program Plan (G)	June 23
4.2.2.3	Implement the cultural competency training through Professional Development.	HR Plan (OH)	June 22
4.2.2.4	Work with SERC to create EDI training programs for staff.	HR Plan (OH)	June 23

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

### 4.2 Address Stigma: Address cultural stigmas within the people served to elevate access to adequate healthcare.

4.2.3	Implement an externally focused educational curriculum focused on awareness of populations served, including misconceptions and stigma.	Operational Plan	Target Date
4.2.3.1	Integrate the need to educate around stigma into the Outreach and Communication Plans.	Development Plan (OH, G)	June 24
4.2.3.2	Provide disability awareness educational content regarding physical and digital accessibility.	Program Plan: OHC (OH)	June 23
4.2.3.3	Facilitate an experiential training for the public at large to give stakeholders an experience of the stigma faced by those with mental health and addictions challenges (e.g., schizophrenia virtual reality experience).	Clinical Program Plan (G)	June 23



## 4. Transforming through Diversity

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4.3	<b>Economic Barriers:</b> Identify economic barriers that limit access and opportunities for our staff and the people we serve and seek solutions to help overcome challenges of scarcity.	
4.3.1	Utilize research to identify barriers and potential solutions for overcoming them.	p. 98
4.3.2	Develop methods to assist stakeholders in delivering services to the people we serve that include consideration of social determinants of health.	p. 99
4.3.3	Evaluate opportunities to provide enhanced compensation and benefits (such as childcare, transportation, wellness, etc..) for staff based on increased revenues, where possible.	p. 100

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

### 4.3

**Economic Barriers:** Identify economic barriers that limit access and opportunities for our staff and the people we serve and seek solutions to help overcome challenges of scarcity.

#### 4.3.1

Utilize research to identify barriers and potential solutions for overcoming them.

#### Operational Plan

#### Target Date

##### 4.3.1.1

Compare data within the population served against the population of Connecticut or other relevant geographic areas to identify barriers in delivering services to under-represented members of the community.

Accessibility Plan (OH, G)  
Program Plan: OHC (OH)  
Clinical Program Plan (G)  
HR Plan (OH)

June 24

##### 4.3.1.2

Research national programs with a focus on underserved populations to identify and replicate innovative new solutions.

Accessibility Plan (OH, G)  
Program Plan: OHC (OH)  
Clinical Program Plan (G)  
HR Plan (OH)

June 24

##### 4.3.1.3

Research and access various federal relief funds available to populations served.

Accessibility Plan (OH, G)  
Program Plan: OHC (OH)  
Clinical Program Plan (G)  
HR Plan (OH)

June 24

##### 4.3.1.4

Identify two new ways to help current employees advance into management positions.

HR Plan (OH, G)

June 23

## 4. Transforming through Diversity

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### 4.3

**Economic Barriers:** Identify economic barriers that limit access and opportunities for our staff and the people we serve and seek solutions to help overcome challenges of scarcity.

#### 4.3.2

Develop methods to assist stakeholders in delivering services to the people we serve that include consideration of social determinants of health.

Operational Plan

Target Date

##### 4.3.2.1

Develop or expand existing services to provide targeted impact related to social determinants of health.

Accessibility Plan (OH, G)  
Program Plan: OHC (OH)  
Clinical Program Plan (G)

June 24

##### 4.3.2.2

Consider in-house resource center to refer and/or facilitate access to essential services (e.g., transportation, childcare, fitness, dental, mental and physical health).

Accessibility Plan (G)  
Program Plan: OHC (OH)  
Clinical Program Plan (G)

June 24

##### 4.3.2.3

Develop a plan to consistently and effectively provide interpretive services (ASL, Spanish, other language interpretation) to existing or potential service recipients.

Accessibility Plan (OH, G)

June 24

##### 4.3.2.4

Create, update, and implement outcome measures that demonstrate and reflect organizational performance and impact on the lives and social determinants of health of the individuals we serve.

Quality Assurance Plan (OH, G)

June 23

## 4. Transforming through Diversity

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### 4.3

**Economic Barriers:** Identify economic barriers that limit access and opportunities for our staff and the people we serve and seek solutions to help overcome challenges of scarcity.

#### 4.3.3

Evaluate opportunities to provide enhanced compensation and benefits (such as childcare, transportation, wellness, etc..) for staff based on increased revenues, where possible.

Operational Plan

Target Date

##### 4.3.3.1

Through the budget process, evaluate earned revenues including existing and projected.

Program Plan: OHC (OH)

June 23

##### 4.3.3.2

Provide cost analysis on enhanced wages/benefits to identify increased revenues needed organization-wide to support these enhancements. Continue to identify cost savings in other areas to help overcome economic barriers.

Finance MGT Plan (OH, G)

June 23

##### 4.3.3.3

Create a compensation plan with the goal of enhancing compensation across the organization.

Executive Plan (OH, G)

June 23

##### 4.3.3.4

Research and document what three other organizations are doing in this area for employees and present this for consideration.

HR Plan (OH)

June 23

## 4. Transforming through Diversity

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4.4	<b>Inclusive Communication:</b> Improve and diversify communication methods to overcome language barriers and accommodate varying communication styles.	
4.4.1	Develop policies to address inclusive communication including accountability measures for upholding them.	p. 102
4.4.2	Consult with experts in communication and investigate other communication styles to utilize.	p. 103
4.4.3	Provide resources and training to staff responsible for external communication.	p. 104

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

### 4.4

**Inclusive Communication:** Improve and diversify communication methods to overcome language barriers and accommodate varying communication styles.

#### 4.4.1

Develop policies to address inclusive communication including accountability measures for upholding them.

Operational Plan

Target Date

##### 4.4.1.1

Create a DEI work group to provide insight and input into the revision and development of policies to guide inclusive communications.

Executive Plan (OH)

June 22

##### 4.4.1.2

Explicitly define the goals of an inclusive communication strategy with specific and actionable language.

IT Plan (G)

June 22

##### 4.4.1.3

Design and implement a process for evaluating all Organizational Policies related to inclusive communication that values diversity and equity.

Executive Plan (G)

June 23

##### 4.4.1.4

Revise and create policies that will address the diverse communication needs of all stakeholders.

Program Plan: OHC (OH)

June 23

##### 4.4.1.5

Conduct periodic assessment of communications tools and platforms available. Review with business units and implement solutions as prudent.

IT Plan (OH)

June 24

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

### 4.4

**Inclusive Communication:** Improve and diversify communication methods to overcome language barriers and accommodate varying communication styles.

#### 4.4.2

Consult with experts in communication and investigate other communication styles to utilize.

Operational Plan

Target Date

##### 4.4.2.1

Conduct yearly reviews on primary and secondary languages among populations served.

Executive Plan (OH)

June 22

##### 4.4.2.2

Conduct yearly reviews on communication disabilities among populations served.

Executive Plan (OH)

June 22

##### 4.4.2.3

Hire a Communications Director to focus on internal communications and collaborate with Development Department on external communications, including an emphasis on inclusive communication.

Executive Plan (OH, G)  
Development Plan (G)  
HR Plan (OH)

June 24

##### 4.4.2.4

Integrate external communication position into discussions about and training on including inclusive language.

Development Plan (OH, G)

June 24

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

**4.4** **Inclusive Communication:** Improve and diversify communication methods to overcome language barriers and accommodate varying communication styles.

4.4.3	Provide resources and training to staff responsible for external communication.	Operational Plan	Target Date
4.4.3.1	Develop a communications training for Gilead Staff who are involved in external communication.	Executive Plan (G)	June 23
4.4.3.2	DEI Committee to develop plan.	Executive Plan (OH) Development Plan (OH, G)	June 22



## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

4.5	<b>Recruitment and Retention:</b> Identify and implement strategies for improved recruitment and retention of diverse populations that reflect the communities we serve.	
4.5.1	Implement improved and expanded recruitment methods to better attract diverse and highly qualified candidates. (See Goal 5.1 Workforce Development - Recruitment.)	p. 108
4.5.2	Enhance the onboarding program to focus on the new hire experience. (See Goal 5.2 Workforce Development - Onboarding.)	p. 113
4.5.3	Create strategies to increase the retention of diverse and qualified staff by leveraging employee feedback, providing opportunities for internal career growth, and cultivating a culture of belonging. (See Goal 5.4 Workforce Development - Retention.)	p. 123
4.5.4	Develop and monitor a strategy for recruitment of diverse board members.	p. 106

## 4. Transforming through Diversity

The organizations employ and provide services to demographic groups that are systematically marginalized, including people with disabilities. Intentionally and explicitly considering diversity, equity, and inclusion (DEI) as part of every major decision and prioritizing the funding of DEI initiatives is critical to the achievement of our collective mission of access and empowerment.

4.5

**Recruitment and Retention:** Identify and implement strategies for improved recruitment and retention of diverse populations that reflect the communities we serve.

4.5.4	Develop and monitor a strategy for recruitment of diverse board members.	Operational Plan	Target Date
4.5.4.1	Develop a board recruitment manual that guides current and future board recruitment.	Executive Plan (G)	June 23
4.5.4.2	Develop a communication plan that includes emphasis on innovative ways to create and disseminate a powerful recruitment message.	Development Plan (G)	June 24
4.5.4.3	Conduct Board Assessment annually as part of recruitment process.	Executive Plan (OH, G)	June 22

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

- |     |   |        |
|-----|---|--------|
| 5.1 | <b>Recruitment:</b> Implement improved and expanded recruitment methods to better attract diverse and highly qualified candidates.  | p. 108 |
| 5.2 | <b>Onboarding:</b> Enhance the onboarding program to focus on the new hire experience.  | p. 113 |
| 5.3 | <b>Training &amp; Development:</b> Strengthen professional development programs and provide equitable access to development opportunities at all levels of the organizations.   | p. 117 |
| 5.4 | <b>Retention:</b> Create strategies to increase the retention of diverse and qualified staff by leveraging employee feedback, providing opportunities for internal career growth, and cultivating a culture of belonging. | p. 123 |
| 5.5 | <b>Employee Recognition:</b> Design and implement methods for recognizing and rewarding outstanding employee performance.   | p. 128 |

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

5.1	<b>Recruitment:</b> Implement improved and expanded recruitment methods to better attract diverse and highly qualified candidates.	
5.1.1	Develop and implement additional training, assistance, and resources to support the recruitment team and hiring managers.	p. 109
5.1.2	Implement a new recruitment strategy across the organization to enhance the diversity of qualified candidates.	p. 110
5.1.3	Identify and implement non-compensation-based strategies to help position the organization as an “Employer of Choice” (a place that workers choose when they have other options).	p. 111
5.1.4	Review and revise job descriptions to make sure that the stated experience and qualifications necessary for each position are consistent with business necessity.	p. 112

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.1 Recruitment: Implement improved and expanded recruitment methods to better attract diverse and highly qualified candidates.

5.1.1	Develop and implement additional training, assistance, and resources to support the recruitment team and hiring managers.	Operational Plan	Target Date
5.1.1.1	Determine how we can approach the medical community and payor community to provide specific services. Create opportunities for meetings with the medical providers.	Clinical Program Plan (G)	June 23
5.1.1.2	Simplify and streamline the job application process to improve the selection process of qualified candidates.	IT Plan (G) HR Plan (OH, G)	June 23
5.1.1.3	Review recruitment policies and implement strategies to expand pool of workers.	Program Plan: OHC (OH) HR Plan (OH)	June 23
5.1.1.4	Identify existing weaknesses in training and resources that directly support the hiring of employees to develop a plan of action for the recruitment team and hiring managers.	IT Plan (G)	June 23
5.1.1.5	Create technical-skill tests that are on par with job requirements for prospective employees to complete during the recruiting process.	IT Plan (OH)	June 22
5.1.1.6	Review staffing needs and effectiveness before each classroom/program opens.	Program Plan: OHS (OH) Program Plan: OHCP (OH)	June 24
5.1.1.7	Identify and utilize additional external recruitment sources to advertise.	HR Plan (OH, G)	June 22
5.1.1.8	Identify and build relationships with organizations that provide grants to agencies that are focusing on diversifying their organizations.	HR Plan (OH)	June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.1 Recruitment: Implement improved and expanded recruitment methods to better attract diverse and highly qualified candidates.

5.1.2	Implement a new recruitment strategy across the organization to enhance the diversity of qualified candidates.	Operational Plan	Target Date
5.1.2.1	Explore other methods of attracting a broader pool of candidates.	Program Plan: OHC (OH) Cultural Competency Plan (OH, G) HR Plan (OH)	June 22
5.1.2.2	Focus on affinity organizations (e.g., Association of Black Accountants), and other partnerships and internships to expand our recruitment to better attract diverse candidates for professional positions.	Program Plan: OHC (OH) HR Plan (OH, G) Cultural Competency Plan (OH, G)	June 22
5.1.2.3	Utilize creative and innovative avenues including digital tools and social media, to expand the advertisement of job opportunities.	Program Plan: OHC (OH) HR Plan (OH, G)	June 24
5.1.2.4	Explore the feasibility of organization operated services, like affordable daycare, as a way to attract and support a diverse staffing pool.	Cultural Competency Plan (G)	June 23
5.1.2.5	Establish quarterly review of demographic data in each department to determine where targeted efforts should be used to increase diversity.	HR Plan (OH), Cultural Competency Plan (OH)	June 22

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.1 Recruitment: Implement improved and expanded recruitment methods to better attract diverse and highly qualified candidates.

5.1.3	Identify and implement non-compensation-based strategies to help position the organization as an “Employer of Choice” (a place that workers choose when they have other options).	Operational Plan	Target Date
5.1.3.1	Review and enhance competency-based recruitment strategies.	Program Plan: OHC (OH) Program Plan: OHCP (OH) HR Plan (OH, G) Cultural Competency Plan (OH, G)	June 23
5.1.3.2	Create work-life balance initiatives.	HR Plan (OH, G) Cultural Competency Plan (OH) Program Plan: OHCP (OH)	June 23
5.1.3.3	Develop a communication plan that incorporates innovative ways to create and disseminate a powerful recruitment message.	Development Plan (OH, G)	June 23
5.1.3.4	Investigate and develop recruitment strategies that are specific to ethnic, cultural and demographic groups.	Cultural Competency Plan (G)	June 22
5.1.3.5	Establish career paths for direct support employees.	Program Plan: OHCP (OH) HR Plan (OH)	June 24

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.1 Recruitment: Implement improved and expanded recruitment methods to better attract diverse and highly qualified candidates.

5.1.4	Review and revise job descriptions to make sure that the stated experience and qualifications necessary for each position are consistent with business necessity.	Operational Plan	Target Date
5.1.4.1	Evaluate each job responsibility and create a productive and effective system based on accountability. Adjust job descriptions to ensure they accurately reflect the needs of the department.	Program Plan: OHS (OH) Program Plan: OHCP (OH)	June 23
5.1.4.2	Revise existing job descriptions, on an annual basis and when needed, to reflect the evolution of the changing times and service trends.	Program Plan: OHC (OH) Program Plan: OHCP (OH) HR Plan (OH, G)	June 23
5.1.4.3	Create a check in experience with new employees as a part of the onboarding process.	HR Plan (OH)	June 22
5.1.4.4	Review job descriptions for language that is inclusive, understandable and inviting to diverse readers.	Cultural Competency Plan (G)	June 24



## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.2 Onboarding: Enhance the onboarding program to focus on the new hire experience.

- |       |   |        |
|-------|---|--------|
| 5.2.1 | Complete a thorough analysis of the information and skills that newly hired applicants should learn in order to succeed (including a gap analysis of existing training).                      | p. 114 |
| 5.2.2 | Implement a year-long new hire onboarding program implementing the components recommended by the Professional Development committee, based on the analysis completed through objective 5.2.1. | p. 115 |
| 5.2.3 | Integrate the new onboarding and training process to ensure consistency across all three organizations.   | p. 116 |

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.2 Onboarding: Enhance the onboarding program to focus on the new hire experience.

5.2.1	Complete a thorough analysis of the information and skills that newly hired applicants should learn in order to succeed (including a gap analysis of existing training).	Operational Plan	Target Date
5.2.1.1	Identify skills and peripheral information needed within each position and department to build categories or training initiatives which can then be built off of.	IT Plan (G)	June 23
5.2.1.2	Collaborate with the business units to automate and streamline the recruiting processes where logical.	IT Plan (OH)	June 24
5.2.1.3	Assist with the creation of onboarding training materials pertaining to necessary skills and knowledge to perform job functions.	IT Plan (OH)	June 23
5.2.1.4	Integrate existing onboarding strategies with individualized department needs in a structured approach.	Program Plan: OHC (OH)	June 24
5.2.1.5	Use results from analysis 5.2.1 to inform the New Employee Orientation (NEO) experience.	HR Plan (OH)	June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.2 Onboarding: Enhance the onboarding program to focus on the new hire experience.

5.2.2

Implement a year-long new hire onboarding program implementing the components recommended by the Professional Development committee, based on the analysis completed through objective 5.2.1.

Operational Plan

Target Date

5.2.2.1

Create a training module providing education and information on how to interact with individuals with disabilities in a supportive and respectful manner, that also considers the roles and duties of each position.

Accessibility Plan (OH, G)

June 23

5.2.2.2

Develop and implement a comprehensive onboarding process for all staff.

Program Plan: OHS (OH)

June 23

5.2.2.3

Develop an onboarding checklist to engage staff throughout the year and provide necessary training.

HR Plan (G)

June 23

5.2.2.4

Maintain and expand Professional Development based on staff needs and interests. Develop new teacher orientation training.

Program Plan: OHS (OH)

June 24

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.2 Onboarding: Enhance the onboarding program to focus on the new hire experience.

#### 5.2.3

Integrate the new onboarding and training process to ensure consistency across all three organizations.

Operational Plan

Target Date

##### 5.2.3.1

Develop small committee to continually evaluate and adjust the onboarding initiatives among the agencies.

IT Plan (G)

June 22

##### 5.2.3.2

Collaborate with the business units to automate and streamline the on/off-boarding processes where logical.

IT Plan (OH)

June 24

##### 5.2.3.3

Identify areas where onboarding and training processes differ and identify changes for integration and collaboration.

HR Plan (G)

June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.3

**Training & Development:** Strengthen professional development programs and provide equitable access to development opportunities at all levels of the organizations.

#### 5.3.1

Conduct a training needs assessment to identify the skills staff need to perform more effectively throughout the course of their employment.

p. 118

#### 5.3.2

Develop mechanisms for capturing and disseminating organizational knowledge and best practices based on results of the needs assessment.

p. 119

#### 5.3.3

Dedicate time and resources for supervisors to engage in staff mentoring and on-the-job training, including the implementation of staff supervision across all three organizations.

p. 120

#### 5.3.4

Explore the implementation of cohort or individual degree programs for various employee groups.

p. 121

#### 5.3.5

Identify and secure funding for relevant external professional development resources.

p. 122

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.3

**Training & Development:** Strengthen professional development programs and provide equitable access to development opportunities at all levels of the organizations.

5.3.1	Conduct a training needs assessment to identify the skills staff need to perform more effectively throughout the course of their employment.	Operational Plan	Target Date
5.3.1.1	Ensure that ongoing training needs assessments are inclusive of the needs of individuals with disabilities and provides a universally designed environment.	Accessibility Plan (OH, G)	June 23
5.3.1.2	Develop a training assessment tool specific to our program offerings.	Program Plan: OHC (OH)	June 24
5.3.1.3	Create a form that captures the needs assessment information that is collected during supervisory meetings.	HR Plan (OH, G)	June 23
5.3.1.4	Create and review a training needs assessment in coordination with a DEI committee with a focus on inclusivity.	Cultural Competency Plan (OH, G)	June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.3

**Training & Development:** Strengthen professional development programs and provide equitable access to development opportunities at all levels of the organizations.

5.3.2	Develop mechanisms for capturing and disseminating organizational knowledge and best practices based on results of the needs assessment.	Operational Plan	Target Date
5.3.2.1	Create a consistently updated Intranet resource that disseminates institutional knowledge, best practices, internal training initiatives and 3rd party training resources.	IT Plan (G)	June 24
5.3.2.2	Periodically assess tools/platforms available and update to accurately reflect best practices and business requirements.	IT Plan (OH)	June 24
5.3.2.3	Support relevant Quality Assurance related training efforts of staff on documentation requirements identified in the needs assessment.	Quality Assurance Plan (OH, G)	June 24
5.3.2.4	Ensure that the internal communication and training mechanisms are inclusive of the needs of individuals with disabilities, provides a universally designed environment, and happen on a recurring basis.	Accessibility Plan (OH, G)	June 23
5.3.2.5	Identify how other companies capture and disseminate organizational knowledge.	HR Plan (OH, G)	June 24
5.3.2.6	Cross train staff so that knowledge is not lost.	HR Plan (OH, G)	June 24

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.3

**Training & Development:** Strengthen professional development programs and provide equitable access to development opportunities at all levels of the organizations.

#### 5.3.3

Dedicate time and resources for supervisors to engage in staff mentoring and on-the-job training, including the implementation of staff supervision across all three organizations.

Operational Plan

Target Date

##### 5.3.3.1

Regularly engage with staff to mentor and educate through on-the-job training.

Program Plan: OHC (OH)

June 24

##### 5.3.3.2

Implement a consistent management training program for both new manager and existing managers.

Executive Plan (G)

June 23

##### 5.3.3.3

Explore avenues to develop affinity or support groups that target traditionally neglected or overlooked groups.

Cultural Competency Plan (G)

June 23

##### 5.3.3.4

Identify specific DEI training elements for supervisory staff.

Cultural Competency Plan (G)

June 22



## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.3

**Training & Development:** Strengthen professional development programs and provide equitable access to development opportunities at all levels of the organizations.

#### 5.3.4

Explore the implementation of cohort or individual degree programs for various employee groups.

Operational Plan

Target Date

##### 5.3.4.1

Create internal program for staff to advance into a higher-level position while obtaining the necessary degree/credential.

HR Plan (G)

June 23

##### 5.3.4.2

Develop an enhanced Tuition Reimbursement program that covers a higher portion of master's degree coursework.

Executive Plan (OH, G)

June 23

##### 5.3.4.3

Create training on philanthropic impact and each employee's role in its success.

Development Plan (OH, G)

June 24

##### 5.3.4.4

Identify mission matches with each program to ensure maximum investment by our stakeholders.

Development Plan (OH, G)

June 24

##### 5.3.4.5

Explore the creation and establishment of Oak Hill University.

HR Plan (OH)

June 24

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.3

**Training & Development:** Strengthen professional development programs and provide equitable access to development opportunities at all levels of the organizations.

#### 5.3.5

Identify and secure funding for relevant external professional development resources.

Operational Plan

Target Date

##### 5.3.5.1

Establish external partnerships with colleges and universities.

HR Plan (OH, G)

June 24

##### 5.3.5.2

Actively participate in the grant seeking and development process.

Program Plan: OHCP (OH)  
Finance MGT Plan (OH, G)

June 23

##### 5.3.5.3

Identify and cultivate donors and grantors interested in investing in professional development programs.

Development Plan (OH, G)

June 24

##### 5.3.5.4

Identify groups who are committed to our mission and establish partnerships with them.

HR Plan (OH)

June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

5.4	<b>Retention:</b> Create strategies to increase the retention of diverse and qualified staff by leveraging employee feedback, providing opportunities for internal career growth, and cultivating a culture of belonging.	
5.4.1	Track and examine data such as employee turnover and retention data and employee feedback data for relevant trends or challenges to be addressed.	p. 124
5.4.2	Develop career paths for each job classification.	p. 125
5.4.3	Develop an executive and management level mentorship program.	p. 126
5.4.4	Create an enhanced organization-wide succession plan including incentive programs and strategies for talent identification.	p. 127

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.4

**Retention:** Create strategies to increase the retention of diverse and qualified staff by leveraging employee feedback, providing opportunities for internal career growth, and cultivating a culture of belonging.

#### 5.4.1

Track and examine data such as employee turnover and retention data and employee feedback data for relevant trends or challenges to be addressed.

Operational Plan

Target Date

##### 5.4.1.1

Utilize system of record reports and internal QA surveys to analyze employee data and understand trends for a given time period.

IT Plan (G)  
Quality Assurance Plan (OH, G)

June 24

##### 5.4.1.2

Develop reporting automation based on source systems, amending as required by the business to provide business units the data needed to make thoughtful decisions.

IT Plan (OH)

June 24

##### 5.4.1.3

Continue to analyze and encourage Lean processes to improve productivity and ensure that quality services are provided.

Program Plan: OHS (OH)

June 24

##### 5.4.1.4

Conduct regular exit interviews with staff.

Program Plan: OHCP (OH)  
HR Plan (G)

June 23

##### 5.4.1.5

Develop a process within HR to track and report on turnover and retention data.

Strike Contingency Plan (G)

June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

**5.4** **Retention:** Create strategies to increase the retention of diverse and qualified staff by leveraging employee feedback, providing opportunities for internal career growth, and cultivating a culture of belonging.

5.4.2	Develop career paths for each job classification.	Operational Plan	Target Date
5.4.2.1	Examine the organizational structure to identify opportunities for advancement.	Program Plan: OHC (OH) Program Plan: OHCP (OH) HR Plan (G)	June 23
5.4.2.2	Communicate accessible avenues of advancement opportunities to staff.	Program Plan: OHC (OH) Program Plan: OHCP (OH) HR Plan (G)	June 24
5.4.2.3	Maintain and expand systems to encourage leadership at all staff levels.	Program Plan: OHS (OH) Program Plan: OHCP (OH)	June 24

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.4

**Retention:** Create strategies to increase the retention of diverse and qualified staff by leveraging employee feedback, providing opportunities for internal career growth, and cultivating a culture of belonging.

#### 5.4.3

Develop an executive and management level mentorship program.

Operational Plan

Target Date

##### 5.4.3.1

Ensure that the recipients of the mentorship program demonstrate competency in supporting people with disabilities.

Accessibility Plan (OH, G)

June 24

##### 5.4.3.2

Design and implement an organizational Leadership Program to prepare employees for both middle and executive management roles.

Executive Plan (G)

June 23

##### 5.4.3.3

Develop a strategy and implementation plan for a mentorship program as part of the Professional Development Committee work.

Executive Plan (OH)

June 22

##### 5.4.3.4

Research and re-establish a mentorship program with clear structure, concise learning objectives and encouragement to build strong working relationships.

HR Plan (OH)

June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

5.4

**Retention:** Create strategies to increase the retention of diverse and qualified staff by leveraging employee feedback, providing opportunities for internal career growth, and cultivating a culture of belonging.

5.4.4	Create an enhanced organization-wide succession plan including incentive programs and strategies for talent identification.	Operational Plan	Target Date
5.4.4.1	Review and enhance the organization's current succession plan in order to identify and cultivate talent within the organization.	Executive Plan (G)	June 23
5.4.4.2	Create a system to identify and develop internal employees for succession opportunities while also identifying external candidates with potential for advancement.	HR Plan (OH)	June 23
5.4.4.3	Review the details of the existing succession plan with the CEO and Executive Team for regular feedback and enhancements.	HR Plan (OH)	June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.5 Employee Recognition: Design and implement methods for recognizing and rewarding outstanding employee performance.

5.5.1	Develop an organization-wide recognition program that is designed to highlight staff from all three organizations and celebrate success.	p. 129
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5.5.2	Create no or low-cost options for recognizing employees who engage in “mission moments” (short inspirational examples of how our organization is making an impact).	p. 130
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5.5.3	Develop and implement compensation-based employee recognition strategies.	p. 131
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5.5.4	Engage the board and development department in employee recognition efforts.	p. 132
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## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.5 Employee Recognition: Design and implement methods for recognizing and rewarding outstanding employee performance.

5.5.1	Develop an organization-wide recognition program that is designed to highlight staff from all three organizations and celebrate success.	Operational Plan	Target Date
5.5.1.1	Establish staff appreciation events to celebrate the achievements of all staff and recognize outstanding achievements.	Program Plan: OHC (OH) Program Plan: OHCP (OH) HR Plan (OH, G) Executive Plan (OH)	June 23
5.5.1.2	Recognize special dates like work anniversaries.	Executive Plan (OH)	June 22
5.5.1.3	Provide cost analysis to identified events or recognition and identify special funding available to determine feasibility of purposed activities.	Finance MGT Plan (OH, G)	June 23
5.5.1.4	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.5 Employee Recognition: Design and implement methods for recognizing and rewarding outstanding employee performance.

5.5.2	Create no or low-cost options for recognizing employees who engage in “mission moments” (short inspirational examples of how our organization is making an impact).	Operational Plan	Target Date
5.5.2.1	Provide occasional personal, handwritten notes from the CEO recognizing a frontline employee’s work and accomplishments.	Program Plan: OHC (OH) Executive Plan (OH) HR Plan (OH)	June 22
5.5.2.2	Recognize "mission moments" in the newsletter.	HR Plan (G)	June 23
5.5.2.3	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.5 Employee Recognition: Design and implement methods for recognizing and rewarding outstanding employee performance.

5.5.3	Develop and implement compensation-based employee recognition strategies.	Operational Plan	Target Date
5.5.3.1	Develop strategies/programs for tying compensation to a review process that rates performance and experience, while also identifying areas for growth and future goals.	Executive Plan (OH) HR Plan (OH, G) Development Plan (G)	June 23
5.5.3.2	Create an employee recognition plan that clearly outlines methods of recognition, captures the success of this recognition, communicates the recognition internally and externally, outlines an available budget, outlines the role of each department and the board in this effort.	Development Plan (OH)	June 23
5.5.3.3	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23

## 5. Workforce Development

The organizations, consistent with industry trends, experience staffing shortages Related to compensation (impacted by funding), turnover and the need for specialized skills. Attracting, recruiting, developing, and retaining a passionate and capable workforce is necessary to deliver high quality programs and services.

### 5.5 Employee Recognition: Design and implement methods for recognizing and rewarding outstanding employee performance.

5.5.4	Engage the board and development department in employee recognition efforts.	Operational Plan	Target Date
5.5.4.1	Look for ways to invite board members to honor and thank employees.	Development Plan (G) Executive Plan (OH)	June 23
5.5.4.2	Encourage the board and development department to maintain staff appreciation as a priority in fundraising efforts.	Executive Plan (OH)	June 22
5.5.4.3	Educate all stakeholders of their roles in recognizing employees as outlined in the Employee Recognition Plan.	Development Plan (OH)	June 24
5.5.4.4	Communicate the impact of employee recognition.	Development Plan (OH)	June 22
5.5.4.5	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23

## Appendix A: Interventions by Target Date

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## Appendix A: Interventions by Target Date

#	Intervention	Operational Plan	Target Date
June 2022			
1.1.1.6	Work with the state and towns we service to understand key initiatives and opportunities our organizations could address.	IT Plan (G)	June 22
1.1.3.2	Identify a list of currently operating private organization and governmental collaborations or workgroups (e.g., CCT, NB Recovers, Opiate Task Forces, etc..) in each geographic area or within each department and assign attendance by staff.	Clinical Program Plan (G)	June 22
1.2.2.2	Proactively reach out to families with newly discovered needs to introduce the organization and its services.	Clinical Program Plan (G)	June 22
1.2.2.3	Develop strategies to address any existing and emerging barriers (including privacy law) that prevent family member involvement in advocacy and fundraising activities.	Clinical Program Plan (G)	June 22
1.2.3.2	Identify local colleges and universities with human services or other relevant programs.	HR Plan (G)	June 22
1.2.3.4	Disseminate recruitment marketing materials to local colleges, universities, local and statewide organizations, town boards, advocacy, community recreation centers that have been identified as partners.	HR Plan (OH)	June 22
1.3.1.2	Implement a budgeting process to compare historical staffing ratios to current needs and funding levels.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 22
1.3.1.3	Expand and adapt the emergency staffing plan developed during the COVID-19 pandemic to address specific program challenges.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 22
1.3.1.4	Develop strategies and measurable targets to expand per diem staffing pool.	Clinical Program Plan (G)	June 22
1.3.2.3	Develop and implement outcome goals, objectives, and measures for Gilead's Mental Health Resource Center.	Quality Assurance Plan (G)	June 22
1.3.3.3	Provide monthly actual vs budget reports per program to analyze the impact of implemented outcome measures on program financials.	Finance MGT Plan (OH, G)	June 22
1.3.3.4	Continue to communicate Gilead Outcome Measure Results through the Gilead Intranet Page and through an annual summary communication to all stakeholders.	Executive Plan (G)	June 22
1.3.3.6	Continue to promote and educate managers on culture of data management and provide data through reports by start of FY23.	Executive Plan (OH)	June 22
1.4.1.6	Explore the use of a committee that will come together and discuss recognized needs of the employees and explore training resources where we may assist. Consult and provide training or resources to the departments based on committee recommendations.	HR Plan (OH)	June 22
1.4.1.7	Implement a new executive level role at Oak Hill to promote increased collaboration and program development.	Executive Plan (OH)	June 22
1.4.2.4	Develop and implement a training and integration plan to increase knowledge and skills of staff regarding social determinants of health.	Clinical Program Plan (G)	June 22

#	Intervention	Operational Plan	Target Date
1.4.2.5	Provide a calendar of training offerings as part of the organization's professional development efforts to provide effective tools for our staff related to diversity, equity and inclusion.	Program Plan: OHCP (OH), HR Plan (OH), Executive Plan (OH)	June 22
1.4.3.4	Reevaluate barriers to implementing private pay in-home case management and recovery support services at Gilead and determine viability moving forward.	Clinical Program Plan (G)	June 22
1.4.3.6	Develop a business plan to increase utilization and profitability of Camp Hemlocks.	Executive Plan (OH)	June 22
1.4.4.5	Review program expansion concepts at least quarterly through the Senior Program Leadership Team Meetings.	Executive Plan (OH)	June 22
1.4.5.6	Research grant opportunities to fund cultural competency initiative.	HR Plan (OH), Development Plan (OH)	June 22
1.5.2.1	Develop standards to ensure consistent external messaging.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 22
1.5.3.4	Develop standards and processes to ensure consistent internal messaging.	Program Plan: OHC (OH), HR Plan (OH)	June 22
1.6.1.1	Undertake a major public relations campaign to enable voters to understand the value of our nonprofit provided services.	Executive Plan (OH)	June 22
1.6.1.2	Develop and implement a strategy to increase voter and legislator awareness of the importance of adequate state funding of programs for the individuals we serve.	Executive Plan (OH)	June 22
1.6.2.1	Utilize existing supporter database to communicate about various advocacy issues as needed.	Executive Plan (G)	June 22
1.6.2.2	Engage with the other CT Easterseals agencies.	Executive Plan (OH)	June 22
1.6.3.6	Integrate advocacy campaign messaging into the Communication Plan.	Development Plan (G)	June 22
1.6.3.7	Offer 1-2 public policy training sessions per year and provide access to other training opportunities as available.	Executive Plan (OH), Public Policy Plan (OH)	June 22
1.6.4.2	Establish regular board advocacy committee meetings and leverage relationship with Gaffney Bennett Associates, Inc.	Executive Plan (OH)	June 22
2.1.2.1	Utilize the annual budget process to help identify other funding mechanisms.	Program Plan: OHC (OH), Clinical Program Plan (G)	June 22
2.2.3.1	Determine key performance indicators for each service type which will allow us to analyze mission and impact.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 22
2.3.1.1	Create opportunities for donors at all economic levels.	Executive Plan (OH)	June 22
2.3.1.2	Engage grateful parents to share their stories with potential donors.	Executive Plan (OH)	June 22
2.3.1.3	Offer symposia to existing donors on exciting state of the art activities and coming attractions in our field to invite feedback and discussion.	Executive Plan (OH)	June 22
2.3.2.1	Appoint an advisory committee of Oak Hill and Gilead donors to explore strategies and procedures to expand fundraising capacity.	Executive Plan (OH)	June 22

#	Intervention	Operational Plan	Target Date
2.4.1.3	Identify billing areas to monitor for lost revenue opportunities (e.g., day service authorizations vs. actual billed services).	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 22
2.4.1.4	Identify areas to monitor for revenue gain opportunities (e.g., productivity percentages for billable employees).	Finance MGT Plan (OH, G), Quality Assurance Plan (OH, G)	June 22
2.4.2.1	Discuss with program leaders to help identify financial knowledge gaps with staff to help develop an appropriate training program that targets these needs.	Finance MGT Plan (OH, G)	June 22
2.4.2.2	Implement a training program, across all levels of the organization (NEO, Management Training & program staff meetings).	Finance MGT Plan (OH, G), HR (OH, G)	June 22
2.4.4.3	Explore a Lean Process study to identify appropriate level of training.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 22
2.4.4.5	Create a metrics dashboard to measure cost related to HR functions such as workers comp and safety, labor/grievances, leave of absences, turnover. Report quarterly.	HR Plan (OH, G)	June 22
2.5.4.1	Develop visitation plan with elected officials, public policy and appointed department heads.	Executive Plan (OH, G)	June 22
3.1.1.3	Form an integrated committee by end FY22 consisting of Board Chairs, CEOs and Board members.	Executive Plan (OH, G)	June 22
3.1.2.3	Standardize the use of recruitment marketing materials and use them for recruitment fairs and hiring events.	HR Plan (OH, G)	June 22
3.2.1.2	Clearly define the end goal of business operations to determine gaps in administrative functions.	IT Plan (G)	June 22
3.2.1.5	Form a committee to explore changes in corporate structure.	Executive Plan (OH)	June 22
3.2.2.1	Create an effective process for inter-organization transfer to provide additional opportunities for personal and professional staff development and advancement.	HR Plan (OH, G), Program Plan: OHC (OH)	June 22
3.2.2.4	Identify and integrate at least 3 key functions within each of the administrative departments.	HR Plan (OH, G), Executive Plan (OH)	June 22
3.2.4.3	Develop timeline and plan a retreat on governance or EDI work during FY22-23.	Executive Plan (OH)	June 22
3.3.3.1	Develop a project description and action plan for each of the project priorities that have been identified by the integrated Senior Program Leadership Team.	Program Plan: OHCP (OH), Executive Plan (OH, G)	June 22
3.4.2.1	Identify the customs, beliefs, and values of each organization.	HR Plan (OH), Executive Plan (OH)	June 22
3.4.2.2	Integrate the concepts of justice, access and serving the whole person as part of each organization's core values.	HR Plan (G), Executive Plan (OH)	June 22
3.5.1.3	Develop process and methodology for annual implementation of ANCOR initiatives.	HR Plan (OH)	June 22
3.5.1.5	Leverage current survey development tools in QA to survey payers and the people we serve of services wanted as part of satisfaction survey.	Executive Plan (OH)	June 22
3.5.1.6	Develop format and methodology for senior managers to report back on National trends.	Executive Plan (OH)	June 22
3.5.2.1	Develop format and methodology for identifying potential third party brokers who could facilitate collaborative arrangements.	Executive Plan (OH)	June 22



#	Intervention	Operational Plan	Target Date
3.5.3.1	Develop criteria and timeline to initiate contact with at least one external agency to explore the potential for an affiliation, merger or acquisition that would further expand the continuum of care offered by the organization.	Executive Plan (OH)	June 22
3.5.3.3	Evaluate the efficacy of, and then approach, the professional medical and health insurance communities, and state government agencies to become the go-to partner to provide essential services.	Executive Plan (OH)	June 22
4.1.3.1	Conduct yearly reviews of diversity of workforce compared to diversity of Connecticut and the relevant geographical area.	HR Plan (OH, G), Executive Plan (OH, G)	June 22
4.1.3.5	Work with SERC to identify status of DEI initiative at least annually.	Executive Plan (G)	June 22
4.2.1.3	Implement the cultural competency training through Professional Development.	HR Plan (OH)	June 22
4.2.2.3	Implement the cultural competency training through Professional Development.	HR Plan (OH)	June 22
4.4.1.1	Create a DEI work group to provide insight and input into the revision and development of policies to guide inclusive communications.	Executive Plan (OH)	June 22
4.4.1.2	Explicitly define the goals of an inclusive communication strategy with specific and actionable language.	IT Plan (G)	June 22
4.4.2.1	Conduct yearly reviews on primary and secondary languages among populations served.	Executive Plan (OH)	June 22
4.4.2.2	Conduct yearly reviews on communication disabilities among populations served.	Executive Plan (OH)	June 22
4.4.3.2	DEI Committee to develop plan.	Executive Plan (OH), Development Plan (OH, G)	June 22
4.5.4.3	Conduct Board Assessment annually as part of recruitment process.	Executive Plan (OH, G)	June 22
5.1.1.5	Create technical-skill tests that are on par with job requirements for prospective employees to complete during the recruiting process.	IT Plan (OH)	June 22
5.1.1.6	Identify and utilize additional external recruitment sources to advertise.	HR Plan (OH, G)	June 22
5.1.2.1	Explore other methods of attracting a broader pool of candidates.	Program Plan: OHC (OH), Cultural Competency Plan (OH, G), HR Plan (OH)	June 22
5.1.2.2	Focus on affinity organizations (e.g., Association of Black Accountants), and other partnerships and internships to expand our recruitment to better attract diverse candidates for professional positions.	Program Plan: OHC (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 22
5.1.2.5	Establish quarterly review of demographic data in each department to determine where targeted efforts should be used to increase diversity.	HR Plan (OH), Cultural Competency Plan (OH)	June 22
5.1.3.4	Investigate and develop recruitment strategies that are specific to ethnic, cultural and demographic groups.	Cultural Competency Plan (G)	June 22
5.1.4.3	Create a check in experience with new employees as a part of the onboarding process.	HR Plan (OH)	June 22
5.2.3.1	Develop small committee to continually evaluate and adjust the onboarding initiatives among the agencies.	IT Plan (G)	June 22
5.3.3.4	Identify specific DEI training elements for supervisory staff.	Cultural Competency Plan (G)	June 22

#	Intervention	Operational Plan	Target Date
5.4.3.3	Develop a strategy and implementation plan for a mentorship program as part of the Professional Development Committee work.	Executive Plan (OH)	June 22
5.5.1.2	Recognize special dates like work anniversaries.	Executive Plan (OH)	June 22
5.5.2.1	Provide occasional personal, handwritten notes from the CEO recognizing a frontline employee's work and accomplishments.	Program Plan: OHC (OH), Executive Plan (OH) HR Plan (OH)	June 22
5.5.4.2	Encourage the board and development department to maintain staff appreciation as a priority in fundraising efforts.	Executive Plan (OH)	June 22
5.5.4.4	Communicate the impact of employee recognition.	Development Plan (OH)	June 22
<b>June 2023</b>			
1.1.1.1	Identify at least one community or government produced needs assessment to inform program development or expansion needs across all service types including Outpatient, Residential, Education and other Community Programs.	Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), IT Plan (G)	June 23
1.1.1.2	Explore feasibility to open classrooms in New Haven, Bridgeport, and New London areas to fill regional presence gaps.	Program Plan: OHS (OH)	June 23
1.1.1.4	Provide requested data for business units based on available census data, social media data, and advertising analytics for the areas that we serve in order to facilitate data-driven decision making.	IT Plan (G)	June 23
1.1.1.5	Develop (OH) or continue to enhance (G) a community outreach model that communicates each organization's impact, educates the community about our services while also learning about the range of services being offered both internally (among affiliate partners) and externally.	Development Plan (OH, G)	June 23
1.1.2.1	Develop and implement internal surveys designed to assess existing unmet needs among persons served (including all referrals). Ensure that the surveys themselves are accessible for people with disabilities.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.2	Assess needs of target populations that are not currently being served by any of our three organizations.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.3	Identify potential barriers, including physical ability, race, culture and digital accessibility (website, social media, etc..) that might prevent access to services.	Accessibility Plan (OH, G), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.3.3	Explore the creation of a working group of private organizations and government agencies to meet informally and periodically to facilitate the coordinated provision of services.	Clinical Program Plan (G)	June 23
1.1.3.4	Identify key community stakeholders who may be missing from existing collaborations and create innovative strategies for greater inclusion.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
1.2.1.1	Appoint one or more individuals to act as community outreach liaisons.	Clinical Program Plan (G), Development Plan (OH)	June 23
1.2.1.2	Establish educational programs and support groups to meet the needs of the people we serve.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.2.1.3	Develop at least 5 new strategic partnerships with for-profit or nonprofit businesses related to Gilead's Mental Health Resource Center.	Clinical Program Plan (G)	June 23
1.2.1.4	Develop a workgroup consisting of multiple departments at all levels of the organization and constituents to participate in planning and implementation of strategies to expand relationships within communities where we currently provide services.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.2.2.1	Partner with the CT Nonprofit Alliance to regularly engage board members and family members for advocacy purposes.	Program Plan: OHCP (OH), Facilities Plan (OH)	June 23
1.2.2.4	Explore strategies for enhancing the organization's relationship with NAMI through things such as family groups and advocacy.	Clinical Program Plan (G)	June 23
1.2.3.1	Assess and implement programmatic volunteer opportunities that exist within current service models.	Program Plan: OHC (OH)	June 23
1.3.1.1	Identify the ideal staffing ratios within programs, create a method to monitor, and implement monitoring strategies.	Program Plan: OHCP (OH), Quality Assurance Plan (OH, G)	June 23
1.3.2.4	Ensure Gilead maintains and improves its conformance to CARF standards and achieves full re-accreditation.	Quality Assurance Plan (G)	June 23
1.3.2.7	Use the performance evaluation tool to evaluate each departments performance as it relates to the organization's mission.	HR Plan (OH)	June 23
1.3.3.2	Incorporate review of measures into department and supervisory meetings.	Program Plan I (OH)	June 23
1.3.3.5	Develop a communication plan that effectively communicates organizational impact.	Development Plan (OH, G)	June 23
1.4.1.1	Actively seek partnerships and collaborations related to existing art programs.	Program Plan: OHS (OH)	June 23
1.4.1.2	Invite other departments to participate in regular department meetings.	Program Plan: OHC (OH), Program Plan: OHCP (OH)	June 23
1.4.1.3	Attend existing Clinical Rounds meetings twice per year to discuss recommendations for service innovation and expansion.	Executive Plan (G)	June 23
1.4.1.5	Develop a platform to share articles/info available to all program staff.	Clinical Program Plan (G)	June 23
1.4.2.3	Develop at least one new organizational relationship that provides input related to the needs of the community.	Executive Plan (OH)	June 23
1.4.3.2	Provide financial staff support to programming departments developing business plans for new private pay services. (i.e. budget, costs analysis, pricing, etc.).	Finance MGT Plan (OH, G)	June 23
1.4.3.3	Add one new billable service to Gilead's Outpatient Services (MOPC, Chester OPC, Farrell OPC or MHRC).	Executive Plan (G)	June 23
1.4.3.5	Develop one viable business plan for one new private pay service.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
1.4.4.2	Research costs vs potential revenue and demand for expanded services to identify potential long-term positive financial impact on the organization.	Finance MGT Plan (OH, G)	June 23
1.4.4.3	Develop a rough program expansion proposal for each Gilead Clinical Department to evaluate for viability.	Clinical Program Plan (G)	June 23
1.4.4.4	Evaluate all program expansion proposals and move forward with at least one new proposal, if viable.	Executive Plan (G)	June 23
1.4.5.1	Develop methods to increase the people we serve's knowledge and understanding of available services.	Accessibility Plan (OH, G)	June 23
1.4.5.4	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Facilities Plan (OH, G), Accessibility Plan (OH, G)	June 23
1.4.5.5	Develop methods to increase staff knowledge and understanding of programmatic service offerings that are available throughout all 3 organizations.	HR Plan (OH, G)	June 23
1.5.1.1	Collaborate with Development and Program Departments to identify outreach and communication goals and methods to evaluate success towards those goals.	Quality Assurance Plan (OH, G)	June 23
1.5.1.2	Develop a communication plan that effectively communicates organizational impact to all stakeholders.	Development Plan (OH, G)	June 23
1.5.2.3	Create a partnership between the HR Department and the Development Department to expand our recruitment footprint by creating, promoting, and disseminating recruitment marketing materials.	HR Plan (OH), HR Plan (G)	June 23
1.5.2.4	Identify and add at least one new communication strategy to enhance the public's understanding of our services.	Executive Plan (G)	June 23
1.5.3.1	Develop a mandatory training that ensures all employees understand the services that we offer and how they can be accessed.	Executive Plan (OH, G), Clinical Program Plan (G)	June 23
1.5.3.3	Reach out to consumers and family members, especially younger parents, directly to share our service offerings and discuss their support needs.	Clinical Program Plan (G), Executive Plan (OH)	June 23
1.6.1.3	Explore access and coordination with advocacy resources through Oak Hill (Staff Position and Consultant Resource).	Executive Plan (G), Development Plan (OH, G)	June 23
1.6.3.1	Incorporate advocacy opportunities through in-person, electronic and print communications.	Program Plan: OHC (OH)	June 23
1.6.3.2	Develop and implement an Advocacy Training for staff and external stakeholders.	Executive Plan (G)	June 23
1.6.3.4	Develop a process, through our rehab centers, to engage and train families on consumer advocacy.	Clinical Program Plan (G)	June 23
1.6.3.5	Create a Family Engagement Opportunity to educate families on the numerous ways they can invest in the organization's mission.	Development Plan (OH)	June 23
1.6.5.1	Develop a model for MHRC program replication in other parts of the state.	Executive Plan (G)	June 23
1.6.5.2	Identify one additional specific population (e.g., racial, ethnic or other demographic group) based on need and develop a strategy to address their mental health needs.	Clinical Program Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
2.1.1.1	Hold team/ department meetings to identify unpaid services and research other funding mechanisms (e.g., Grants, Contracts, Fundraising, etc..) to help pay for these needed services. Additional discussions around rate settings can also be held.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.1.2.2	Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
2.1.3.1	Convene key program staff to complete business planning.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.1.3.2	Assess existing services to ensure they align with current market need.	Finance MGT Plan (OH, G)	June 23
2.1.3.3	Use data from the evaluation process to assess the need for marketing investment and if relevant incorporate into the business plan.	Development Plan (OH, G)	June 23
2.1.4.1	Collaborate with other departments to provide billing audits or other applicable reporting to support fiscal evaluation efforts.	Quality Assurance Plan (OH, G)	June 23
2.1.4.2	Continually review staffing needs and effectiveness for optimal service delivery and fiscal viability.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 23
2.1.5.1	Provide data on fiscally underperforming programs, or potential expanding services to assist in the grant evaluation process.	Finance MGT Plan (OH, G)	June 23
2.2.1.2	With all new programming being considered, identify all possible funding methods (e.g., governmental, private insurance, private pay, private grants, etc.), or other pricing strategies to help determine fiscal viability.	Finance MGT Plan (OH, G)	June 23
2.2.1.3	Use data from the evaluation process to assess the need for marketing investment and if relevant incorporate into the business plan	Development Plan (OH, G)	June 23
2.2.2.1	Provide financial data to determine any gaps in funding to assist in the grant evaluation process.	Finance MGT Plan (OH, G)	June 23
2.2.3.2	Determine key performance indicators for each service type which will allow us to analyze profitability and return on investment.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.2.4.1	Establish a core business planning team that will evaluate and select the most appropriate tool to be utilized with all new business needs.	Executive Plan (OH)	June 23
2.2.4.2	Participate in a multi-department business planning process by applying analytical financial research and studies to provide financial data to assist the decision-making process.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.2.4.3	Participate in the business planning process if marketing has been prioritized as a fiscally prudent investment.	Development Plan (OH, G)	June 23
2.3.1.4	Evaluate the need for additional resources on the Development Team in order to strategically advance our Annual Giving.	Executive Plan (G)	June 23
2.3.1.7	Prioritize donor renewal, retention and relationship building in all Annual Giving Program strategies.	Development Plan (OH, G)	June 23
2.3.2.2	Capitalize on the knowledge gained through Annual Giving Program strategies to target specific donors to engage as prospective major donors.	Development Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
2.3.3.2	Create an annual event calendar for all three organizations.	Development Plan (OH, G)	June 23
2.3.3.3	Evaluate Gilead's events strategy to determine return on investment.	Development Plan (G)	June 23
2.3.5.2	Work with Finance Committee and Finance Team to review endowment investment strategy and growth goals.	Development Plan (G)	June 23
2.3.6.3	Develop list of ways by which internal stakeholders can contribute by highlighting events at the beginning of the year.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
2.3.6.4	Develop a training for all employees that highlights the history and role of philanthropy, cultivates positive engagement and nurtures a culture of thankfulness and recognition, beginning with New Employee Orientation.	Program Plan: OHCP (OH), Executive Plan (OH, G), Development (OH, G), HR Plan (OH, G)	June 23
2.4.1.1	Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.	Program Plan: OHCP (OH), Quality Assurance Plan (OH, G), HR Plan (OH)	June 23
2.4.1.2	Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.	Quality Assurance Plan (OH, G)	June 23
2.4.3.1	Determine financial key performance indicators (KPI) by service type.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.3.2	Review KPIs monthly and provide actionable steps if needed to the Finance Department.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G), Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.4.2	Shorten the investigation, decision-making, reporting and notification cycle to reduce time on administrative leave.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
2.4.4.4	Implement training and recommendations from the Lean Process Study.	HR Plan (OH, G)	June 23
2.4.4.6	Implement a plan to improve the following areas; labor relations, safety, & employee engagement.	HR Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
2.5.1.1	Identify two opportunities, per service type, for private pay services or government funded and explore the viability of pursuing those services, including financial analysis.	Clinical Program Plan (G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.5.1.2	Identify two opportunities to provide consulting services or administrative support services to other nonprofits, including financial analysis (e.g., training, group home maintenance, fiscal recordkeeping).	Finance MGT Plan (OH, G), HR Plan (OH, G), Facilities Plan (OH, G)	June 23
2.5.2.1	Consult financial experts with knowledge of non-profit finance management, third party billing, and revenue generation.	Program Plan: OHC (OH), Finance MGT Plan (OH, G)	June 23
2.5.2.2	Through business planning, evaluate the possibilities of new billable revenue opportunities (i.e.: Outpatient Clinic in Hartford, Addiction Services in Middletown, etc.).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Finance MGT Plan (OH, G)	June 23
2.5.2.3	Provide financial analysis on identified new revenue opportunities.	Finance MGT Plan (OH, G)	June 23
2.5.3.1	Through business planning, identify where marketing resources could help maximize revenue.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.5.3.2	Perform lost revenue analysis on all programming/services currently being provided to help identify reasons or roadblocks to achieve maximum billing. Monitor and take action on productivity percentages vs. established benchmarks and budgets.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.5.4.2	Explore access and coordination with advocacy resources through Oak Hill (Staff Position and Lobbyist Resource).	Executive Plan (G)	June 23
3.1.1.1	Coordinate an annual leadership retreat to engage all 3 boards and all 3 leadership teams in vision development.	Executive Plan (OH, G)	June 23
3.1.2.1	Utilizing each brand's personality, purposes and points of difference, research and implement marketing plans, development plans and public relations campaigns to highlight brand and service offerings and impact.	Program Plan: OHC (OH), Executive Plan (OH), HR Plan (OH, G)	June 23
3.1.2.2	Utilizing each brand's personality, purposes and points of difference, advance advocacy efforts collectively and separately, as appropriate.	Program Plan: OHC (OH), HR Plan (OH), Executive Plan (OH)	June 23
3.1.2.4	Develop a working budget, in coordination with relevant parties, to monitor internal and external costs related to brand development (e.g., consultants, third parties, personnel time, etc.).	Finance MGT Plan (OH, G)	June 23
3.2.1.1	Collaborate with boards to identify a priority list of key factors that need to be established or maintained in order for an alternative corporate structure to be effective (e.g., the pillars document used during the affiliation discussion).	Executive Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
3.2.2.3	Consider restructuring current responsibilities or improve cross-training to enable staff to better support all departments.	Finance MGT Plan (OH, G)	June 23
3.2.3.3	Create a reporting tool that will document the areas of integration between/among departments.	HR Plan (OH, G)	June 23
3.2.3.4	Develop integration plans based on integration initiative goals and long-term future intentions.	IT Plan (G), Development Plan (OH, G)	June 23
3.2.3.6	Develop recommendations for targeted area where Work Order system could benefit the entire organization.	Facilities Plan (OH, G)	June 23
3.2.3.7	Complete an assessment of existing administrative integration including future recommendations.	Executive Plan (G)	June 23
3.2.4.1	Conduct at least one "combined" board meeting annually.	Executive Plan (G)	June 23
3.3.1.1	Develop a streamlined referral process across all three agencies, where possible.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.1.2	Evaluate where synergies may exist among current service offerings to ensure seamless service delivery between all programs, education, residential, Oak Hill Centers, and Gilead, as evidenced in inclusive services aligned with our mission.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.1.3	Assess opportunities for shared resources/staffing.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.2.2	Provide thorough education about the organization's programs and services to upper and middle management.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Executive Plan (OH)	June 23
3.3.2.4	Develop a collaborative programmatic team that includes "middle managers" from all 3 agencies.	Program Plan: OHCP (OH), Executive Plan (G)	June 23
3.3.3.2	Identify a project lead and targeted completion date for each of the identified priorities, in partnership with the Oak Hill and Gilead Executive Leadership Team.	Program Plan: OHCP (OH), Executive Plan (OH, G)	June 23
3.3.3.3	Evaluate the financial investment required for each of the identified priority along with a projected future financial impact for the organization.	Executive Plan (OH, G)	June 23
3.4.1.2	Develop a pilot meeting, like Gilead's clinical rounds, that includes members across all three organizations to address the people we serve's shared issues and needs.	Clinical Program Plan (G)	June 23
3.4.2.4	Coordinate an annual leadership retreat to engage all 3 boards and all 3 leadership teams in vision development (same as 3.1.1.1).	Executive Plan (G)	June 23
3.4.3.5	Execute action planning recommendations from Gilead and Oak Hill's DEI consultants into actionable targets and specific timeframes.	Cultural Competency Plan (OH, G)	June 23
3.5.1.1	Develop criteria and methodology to evaluate potential partners/affiliations/mergers for fiscal viability. Perform a SWOT analysis focused on financial performance of these potential providers.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23



#	Intervention	Operational Plan	Target Date
3.5.1.2	Identify and Develop Gilead and OH's growth vision for the next 3-6 years (2 strategic plan cycles).	Executive Plan (OH, G)	June 23
3.5.1.4	Hold blue sky retreat in FY23.	Executive Plan (OH)	June 23
3.5.1.4	Develop format and methodology for conducting a service delivery SWOT to identify potential needs for partners/affiliations/mergers.	Executive Plan (OH, G)	June 23
3.5.2.3	Develop a format and methodology for reviewing publicly available financial data of prospective partners identified.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
3.5.2.4	Evaluate any and all financial impacts of existing and/or future affiliations such as cost saving opportunities, tax/audit, treasury, or credit implications and entity related government filings.	Finance MGT Plan (OH, G)	June 23
3.5.3.2	Develop criteria and timeline to participate in at least one training, event or activity with other agencies to explore the potential for collaboration or partnership.	Executive Plan (OH, G), Development Plan (G)	June 23
3.5.3.4	Identify appropriate group to educate the Development Team about Oak Hill's desire to continue to partner with organizations looking for affiliation opportunities.	Development Plan (OH, G)	June 23
3.5.3.5	Evaluate corporate structure in order to facilitate affiliations that advance the organization's mission.	HR Plan (OH, G), Facilities Plan (OH), Executive Plan (OH)	June 23
3.5.3.6	Create a written plan resulting from the evaluation of a corporate structure in order to facilitate affiliations that advance the organization's mission.	HR Plan (OH)	June 23
4.1.1.3	Review and update language, including forms and documents, policy, treatment planning, etc., to reflect an open and affirming culture of inclusion.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
4.1.2.1	Create a staff and a management training to strengthen a diversity, equity and inclusion focus that emphasizes anti-biased strategies across the organization.	HR Plan (OH, G), Executive Plan (OH, G)	June 23
4.1.2.2	Utilize external training resources as needed to enhance supervisory skills that foster trust and belonging for all staff.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
4.1.2.5	Host at least one event that educates staff about others' cultures, with the potential for recurring future events.	HR Plan (OH)	June 23
4.1.3.2	Conduct yearly reviews of diversity of population served compared to diversity of Connecticut or relevant geographical area.	Quality Assurance Plan (OH, G), Clinical Program Plan (G), HR Plan (OH), Executive Plan (OH)	June 23
4.1.3.3	Explore strategies that can be implemented during the training process that will promote employee retention.	HR Plan (OH), Executive Plan (OH)	June 23
4.1.3.4	Conduct quarterly reviews that demonstrate the diversity within the supervisory ranks.	HR Plan (OH, G)	June 23
4.2.1.2	Identify and review at least two sources of data (e.g., drug companies, Boston University, etc.).	Clinical Program Plan (G)	June 23
4.2.1.6	Work with SERC to create EDI training programs for staff.	HR Plan (OH)	June 23
4.2.2.1	Provide disability awareness educational content regarding physical and digital accessibility.	Program Plan: OHC (OH)	June 23

#	Intervention	Operational Plan	Target Date
4.2.2.2	Develop a curriculum to address bias and stigma and train staff on how to implement curriculum.	Clinical Program Plan (G)	June 23
4.2.2.4	Work with SERC to create EDI training programs for staff.	HR Plan (OH)	June 23
4.2.3.2	Provide disability awareness educational content regarding physical and digital accessibility.	Program Plan: OHC (OH)	June 23
4.2.3.3	Facilitate an experiential training for the public at large to give stakeholders an experience of the stigma faced by those with mental health and addictions challenges (e.g., schizophrenia virtual reality experience).	Clinical Program Plan (G)	June 23
4.3.1.4	Identify two new ways to help current employees advance into management positions.	HR Plan (OH, G)	June 23
4.3.2.4	Create, update, and implement outcome measures that demonstrate and reflect organizational performance and impact on the lives and social determinants of health of the individuals we serve.	Quality Assurance Plan (OH, G)	June 23
4.3.3.1	Through the budget process, evaluate earned revenues including existing and projected.	Program Plan: OHC (OH)	June 23
4.3.3.2	Provide cost analysis on enhanced wages/benefits to identify increased revenues needed organization-wide to support these enhancements. Continue to identify cost savings in other areas to help overcome economic barriers.	Finance MGT Plan (OH, G)	June 23
4.3.3.3	Create a compensation plan with the goal of enhancing compensation across the organization.	Executive Plan (OH, G)	June 23
4.3.3.4	Research and document what three other organizations are doing in this area for employees and present this for consideration.	HR Plan (OH)	June 23
4.4.1.3	Design and implement a process for evaluating all Organizational Policies related to inclusive communication that values diversity and equity.	Executive Plan (G)	June 23
4.4.1.4	Revise and create policies that will address the diverse communication needs of all stakeholders.	Program Plan: OHC (OH)	June 23
4.4.3.1	Develop a communications training for Gilead Staff who are involved in external communication.	Executive Plan (G)	June 23
4.5.4.1	Develop a board recruitment manual that guides current and future board recruitment.	Executive Plan (G)	June 23
5.1.1.1	Determine how we can approach the medical community and payor community to provide specific services. Create opportunities for meetings with the medical providers.	Clinical Program Plan (G)	June 23
5.1.1.2	Simplify and streamline the job application process to improve the selection process of qualified candidates.	IT Plan (G), HR Plan (OH, G),	June 23
5.1.1.3	Review recruitment policies and implement strategies to expand pool of workers.	Program Plan: OHC (OH), HR Plan (OH)	June 23
5.1.1.4	Identify existing weaknesses in training and resources that directly support the hiring of employees to develop a plan of action for the recruitment team and hiring managers.	IT Plan (G)	June 23
5.1.1.7	Identify and build relationships with organizations that provide grants to agencies that are focusing on diversifying their organizations.	HR Plan (OH)	June 23
5.1.2.4	Explore the feasibility of organization operated services, like affordable daycare, as a way to attract and support a diverse staffing pool.	Cultural Competency Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
5.1.3.1	Review and enhance competency-based recruitment strategies.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 23
5.1.3.2	Create work-life balance initiatives.	HR Plan (OH, G) Cultural Competency Plan (OH), Program Plan: OHCP (OH)	June 23
5.1.3.3	Develop a communication plan that incorporates innovative ways to create and disseminate a powerful recruitment message.	Development Plan (OH, G)	June 23
5.1.4.1	Evaluate each job responsibility and create a productive and effective system based on accountability. Adjust job descriptions to ensure they accurately reflect the needs of the department.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 23
5.1.4.2	Revise existing job descriptions, on an annual basis and when needed, to reflect the evolution of the changing times and service trends.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
5.2.1.1	Identify skills and peripheral information needed within each position and department to build categories or training initiatives which can then be built off of.	IT Plan (G)	June 23
5.2.1.3	Assist with the creation of onboarding training materials pertaining to necessary skills and knowledge to perform job functions.	IT Plan (OH)	June 23
5.2.1.5	Use results from analysis 5.2.1 to inform the New Employee Orientation (NEO) experience.	HR Plan (OH)	June 23
5.2.2.1	Create a training module providing education and information on how to interact with individuals with disabilities in a supportive and respectful manner, that also considers the roles and duties of each position.	Accessibility Plan (OH, G)	June 23
5.2.2.2	Develop and implement a comprehensive onboarding process for all staff.	Program Plan: OHS (OH)	June 23
5.2.2.3	Develop an onboarding checklist to engage staff throughout the year and provide necessary training.	HR Plan (G)	June 23
5.2.3.3	Identify areas where onboarding and training processes differ and identify changes for integration and collaboration.	HR Plan (G)	June 23
5.3.1.1	Ensure that ongoing training needs assessments are inclusive of the needs of individuals with disabilities and provides a universally designed environment.	Accessibility Plan (OH, G)	June 23
5.3.1.3	Create a form that captures the needs assessment information that is collected during supervisory meetings.	HR Plan (OH, G)	June 23
5.3.1.4	Create and review a training needs assessment in coordination with a DEI committee with a focus on inclusivity.	Cultural Competency Plan (OH, G)	June 23
5.3.2.4	Ensure that the internal communication and training mechanisms are inclusive of the needs of individuals with disabilities, provides a universally designed environment, and happen on a recurring basis.	Accessibility Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
5.3.3.2	Implement a consistent management training program for both new manager and existing managers.	Executive Plan (G)	June 23
5.3.3.3	Explore avenues to develop affinity or support groups that target traditionally neglected or overlooked groups.	Cultural Competency Plan (G)	June 23
5.3.4.1	Create internal program for staff to advance into a higher-level position while obtaining the necessary degree/credential.	HR Plan (G)	June 23
5.3.4.2	Develop an enhanced Tuition Reimbursement program that covers a higher portion of master's degree coursework.	Executive Plan (OH, G)	June 23
5.3.5.2	Actively participate in the grant seeking and development process.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
5.3.5.4	Identify groups who are committed to our mission and establish partnerships with them.	HR Plan (OH)	June 23
5.4.1.4	Conduct regular exit interviews with staff.	Program Plan: OHCP (OH), HR Plan (G)	June 23
5.4.1.5	Develop a process within HR to track and report on turnover and retention data.	Strike Contingency Plan (G)	June 23
5.4.2.1	Examine the organizational structure to identify opportunities for advancement.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (G)	June 23
5.4.3.2	Design and implement an organizational Leadership Program to prepare employees for both middle and executive management roles.	Executive Plan (G)	June 23
5.4.3.4	Research and re-establish a mentorship program with clear structure, concise learning objectives and encouragement to build strong working relationships.	HR Plan (OH)	June 23
5.4.4.1	Review and enhance the organization's current succession plan in order to identify and cultivate talent within the organization.	Executive Plan (G)	June 23
5.4.4.2	Create a system to identify and develop internal employees for succession opportunities while also identifying external candidates with potential for advancement.	HR Plan (OH)	June 23
5.4.4.3	Review the details of the existing succession plan with the CEO and Executive Team for regular feedback and enhancements.	HR Plan (OH)	June 23
5.5.1.1	Establish staff appreciation events to celebrate the achievements of all staff and recognize outstanding achievements.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
5.5.1.3	Provide cost analysis to identified events or recognition and identify special funding available to determine feasibility of purposed activities.	Finance MGT Plan (OH, G)	June 23
5.5.1.4	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23
5.5.2.2	Recognize "mission moments" in the newsletter.	HR Plan (G)	June 23
5.5.2.3	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23
5.5.3.1	Develop strategies/programs for tying compensation to a review process that rates performance and experience, while also identifying areas for growth and future goals.	Executive Plan (OH), HR Plan (OH, G), Development Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
5.5.3.2	Create an employee recognition plan that clearly outlines methods of recognition, captures the success of this recognition, communicates the recognition internally and externally, outlines an available budget, outlines the role of each department and the board in this effort.	Development Plan (OH)	June 23
5.5.3.3	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23
5.5.4.1	Look for ways to invite board members to honor and thank employees.	Development Plan (G), Executive Plan (OH)	June 23
5.5.4.5	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23
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1.1.1.3	Explore the feasibility of providing transportation for students who attend OHS.	Program Plan: OHS (OH)	June 24
1.1.2.4	Design and implement new programming and services to provide appropriate support for those unmet needs.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
1.1.2.5	Explore the feasibility of an extended day program for students that do not attend Oak Hill Schools and an inclusive Pre-K daycare program that is aligned with our mission, philosophies, and CT Early Learning and Development standards.	Program Plan: OHS (OH)	June 24
1.1.2.6	Explore the feasibility of developing a consulting service, in which Oak Hill's Education Department would support the district's capacity to provide high quality programming for each student.	Program Plan: OHS (OH)	June 24
1.1.3.1	Develop a strong understanding of what services are already offered by other organizations in the community to address existing needs and create strong collaborative partnerships to enhance and strengthen these services.	Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
1.1.3.5	Develop a community outreach model that communicates the organization's community impact and educates about our services while also learning about range of services being offered by other providers.	Development Plan (OH, G)	June 24
1.2.1.5	Enhance engagement opportunities to educate families and other social supports on the numerous ways they can get involved in our mission and how we may collaborate.	Development Plan (OH, G)	June 24
1.2.3.3	Evaluate resources necessary to support a strong volunteer program at Oak Hill and Gilead.	Development Plan (OH, G)	June 24
1.3.2.1	Implement outcome measures at the Gilead Farrell Treatment Center's Residential, IOP, and Outpatient programs and include specific outcomes for substance treatments.	Quality Assurance Plan (G), HR Plan (G), Corporate Compliance Plan (G)	June 24
1.3.2.2	Develop and implement outcome goals, objectives, and measures for Oak Hill's administrative departments that demonstrate their contribution to the achievement of the organization's mission.	Quality Assurance Plan (OH), HR Plan (OH), Corporate Compliance Plan (G)	June 24
1.3.2.5	Create revisions and improvements in Oak Hill's policies, procedures, and processes to work towards conformance to CARF standards for possible future accreditation.	Quality Assurance Plan (OH)	June 24
1.3.2.6	Develop curriculum system rooted in Oak Hill School philosophies and educational methodology, CCSS, and CSDE regulations and licensure requirements.	Program Plan: OHS (OH)	June 24

#	Intervention	Operational Plan	Target Date
1.3.2.8	Integrate this objective into the new DEI plan when it is developed.	Cultural Competency Plan (G)	June 24
1.3.3.1	Regularly review and revise program and administrative outcome measures and provide consistent and clear reporting and improved feedback to relevant stakeholders on performance.	Quality Assurance Plan (OH, G)	June 24
1.4.1.4	Use virtual platforms to share individual program knowledge/expertise in planned offerings at some consistent frequency across OH/GCS/ES programs (should be fun and educational).	Clinical Program Plan (G)	June 24
1.4.2.1	Identify, develop and promote resources for adults with co-occurring disabilities (e.g., mental health and developmental disabilities).	Accessibility Plan (OH, G), Clinical Program Plan (G), Executive Plan (OH)	June 24
1.4.2.2	Actively seek relationships with new school districts and educational organizations/agencies.	Program Plan: OHS (OH)	June 24
1.4.2.6	Explore ways to adjust service offerings to provide access and interest specifically for people of color.	Cultural Competency Plan (G)	June 24
1.4.3.1	Assess and identify opportunities for new service with scalability.	Program Plan: OHC (OH), Program Plan: OHCP (OH)	June 24
1.4.4.1	Generate and devise collaborative program expansion through Senior Program Leadership meetings.	Program Plan: OHC (OH)	June 24
1.4.5.2	Develop an improved transportation program that includes gathering data, aligning Gilead and Oak Hill fleet management, establishing a semi-annual maintenance program and increasing efficiencies of fleet utilization.	Facilities Plan (OH), Facilities Plan (G), Accessibility Plan (OH, G)	June 24
1.4.5.3	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Accessibility Plan (OH, G)	June 24
1.4.5.7	Develop strategies to communicate with populations who may not ordinarily feel comfortable accessing mental health services.	Cultural Competency Plan (G)	June 24
1.5.2.2	Develop marketing plan that will appropriately communicate to all stakeholders what we do and the scope of the program.	Program Plan: OHC (OH), Program Plan: OHS (OH), Clinical Program Plan (G), HR Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 24
1.5.3.2	Identify programming across all three organizations in which a standardized referral and intake process could create synergies to improve program access and clarify outreach efforts.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH)	June 24
1.6.3.3	Partner with NAMI to offer parent support groups, to nurture relationship with NAMI, and to establish Gilead in Middletown as the regional chapter.	Clinical Program Plan (G)	June 24
1.6.4.1	Create clear advocacy goals and evaluate the best investment strategy to meet those goals (i.e. hire a social media staff person, work with marketing and lobbying firms, etc..).	Development Plan (OH, G)	June 24
2.1.4.3	Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 24

#	Intervention	Operational Plan	Target Date
2.1.4.4	Develop a process for evaluating the need to reduce or discontinued unfunded or underfunded services as needed.	Finance MGT Plan (OH, G)	June 24
2.1.5.2	Use data from the evaluation process to assess the need for grant funding and if relevant incorporate into the business plan.	Development Plan (G)	June 24
2.2.1.1	Based on market need and funding opportunities, business planning will be conducted to determine fiscal viability of new services and the presence of any gap in services. (e.g., New Haven, Bridgeport, New London).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
2.2.1.4	Identify 3 potential new programming ideas with non-DMHAS funding sources.	Clinical Program Plan (G)	June 24
2.3.1.5	Become familiar with our existing donors and their knowledge of and investment in our mission.	Development Plan (OH, G)	June 24
2.3.1.6	Create and provide engagement opportunities for existing and prospective donors that communicate impact.	Development Plan (OH, G)	June 24
2.3.2.3	Create and provide engagement opportunities for existing and prospective major donors that communicate impact.	Development Plan (OH, G)	June 24
2.3.3.1	Educate the organization's stakeholders about events and the need to evaluate their return on investment.	Development Plan (OH), HR Plan (OH), Information Technology (OH)	June 24
2.3.4.1	Evaluate the current grant structure and resources to determine whether changes need to made to meet the demands of the entire organization.	Program Plan: OHCP (OH), Development Plan (OH, G)	June 24
2.3.5.1	Collaborate with Finance Team to create an educational module about the organization's philanthropic history, financial growth and use of donor funds.	Development Plan (OH)	June 24
2.3.6.1	Engage the boards in routine outreach to thank existing donors at all levels.	Development Plan (G), Executive Plan (OH)	June 24
2.3.6.2	Raise donor awareness of organizational mission and service offerings.	Development Plan (G), Executive Plan (OH)	June 24
2.3.6.5	Maintain and strengthen board and leadership knowledge of and role in creating a culture of philanthropy within the organization.	Development Plan (OH)	June 24
3.1.1.2	Create a process and timeline to examine, define, and differentiate the brands of all three organizations.	Development Plan (OH, G)	June 24
3.1.2.5	Involve stakeholders in discussion about existing brands, pros and cons of combined and or rebranding.	Development Plan (OH, G)	June 24
3.2.1.3	Continue regular meetings between Gilead and Oak Hill. Consider merging processes where there is overlap and alignment.	IT Plan (OH)	June 24
3.2.1.4	Evaluate departments with existing shared staffing between agencies, and further collaborate or integrate where appropriate to provide improved efficiencies and effectiveness.	Quality Assurance Plan (OH, G)	June 24
3.2.2.2	Share vendors across departments, where appropriate.	Facilities Plan (G)	June 24
3.2.3.1	Explore the integration of existing and new meetings and committees for programmatic, administrative, and training purposes, where appropriate.	Facilities Plan (G), HR Plan (OH, G), Executive Plan (OH)	June 24

#	Intervention	Operational Plan	Target Date
3.2.3.2	Implement technological tools and systems across all three organizations to improve collaboration and improve efficiencies.	IT Plan (OH), Executive Plan (OH), Facilities Plan (OH, G)	June 24
3.2.3.5	Identify facility trainings that can be shared across departments and apply them to the appropriate training platform as needed.	Facilities Plan (G)	June 24
3.2.4.2	Create opportunities to collaborate using internal and external resources (such as SERC).	Development Plan (OH)	June 24
3.3.2.1	Explore opportunities to create new programs that integrate the services and resources of the affiliated organizations.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Executive Plan (OH)	June 24
3.3.2.3	Explore feasibility of partnering with a residential program to develop a high quality residential/educational program to meet identified referral needs.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
3.4.1.1	Implement at least one organization-wide event that allows staff from all programs to develop collaborative rapport.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
3.4.2.3	Work with SERC (State Education Resource Center of CT; DEI Consultant) to develop revised organizational core values.	Development Plan (OH, G)	June 24
3.4.3.1	Implement internal survey and evaluation strategies with specific questions designed to assess the organizational culture as it relates to diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24
3.4.3.2	Develop and implement at least one event within the organization that is intentionally designed to celebrate the importance of diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24
3.4.3.3	Underscore the importance of a common culture of learning by offering internal and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Cultural Competency Plan (G)	June 24
3.4.3.4	Underscore the importance of a common culture of learning by offering internal training that can be accessed by employees of both organizations and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH)	June 24
3.4.4.1	Create or enhance an outreach strategy that both cultivates internal relationships, captures impact and illustrates by example each employee's role within our rich history of philanthropy.	Development Plan (OH, G)	June 24
3.4.4.2	Add a goal regarding our mission to the performance evaluation tool.	HR Plan (OH)	June 24
4.1.1.1	Create and communicate organizational definition of diversity, equity, and inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G)	June 24



#	Intervention	Operational Plan	Target Date
4.1.1.2	Create and communicate, internally and externally, a vision statement to promote a culture of inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (G)	June 24
4.1.2.3	Develop and implement professional learning on key principles of equity and social justice that will align with the organization's vision and mission for development and growth.	Program Plan: OHS (OH)	June 24
4.1.2.4	Identify and integrate educational materials regarding DEI strategies.	Clinical Program Plan (G)	June 24
4.2.1.1	Integrate the need to educate around stigma into the Outreach and Communication Plans.	Development Plan (OH, G)	June 24
4.2.1.4	Integrate the issue of inadequate access to healthcare into the advocacy messaging campaign.	Development Plan (OH, G)	June 24
4.2.1.5	Create a simple one page fact sheet to share with stakeholders and community members.	Clinical Program Plan (G)	June 24
4.2.3.1	Integrate the need to educate around stigma into the Outreach and Communication Plans.	Development Plan (OH, G)	June 24
4.3.1.1	Compare data within the population served against the population of Connecticut or other relevant geographic areas to identify barriers in delivering services to under-represented members of the community.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.2	Research national programs with a focus on underserved populations to identify and replicate innovative new solutions.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.3	Research and access various federal relief funds available to populations served.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.2.1	Develop or expand existing services to provide targeted impact related to social determinants of health.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
4.3.2.2	Consider in-house resource center to refer and/or facilitate access to essential services (e.g., transportation, childcare, fitness, dental, mental and physical health).	Accessibility Plan (G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
4.3.2.3	Develop a plan to consistently and effectively provide interpretive services (ASL, Spanish, other language interpretation) to existing or potential service recipients.	Accessibility Plan (OH, G)	June 24
4.4.1.5	Conduct periodic assessment of communications tools and platforms available. Review with business units and implement solutions as prudent.	IT Plan (OH)	June 24
4.4.2.3	Hire a Communications Director to focus on internal communications and collaborate with Development Department on external communications, including an emphasis on inclusive communication.	Executive Plan (OH, G), Development Plan (G), HR Plan (OH)	June 24
4.4.2.4	Integrate external communication position into discussions about and training on including inclusive language.	Development Plan (OH, G)	June 24

#	Intervention	Operational Plan	Target Date
4.5.4.2	Develop a communication plan that includes emphasis on innovative ways to create and disseminate a powerful recruitment message.	Development Plan (G)	June 24
5.1.1.5	Review staffing needs and effectiveness before each classroom/program opens.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
5.1.2.3	Utilize creative and innovative avenues including digital tools and social media, to expand the advertisement of job opportunities.	Program Plan: OHC (OH), HR Plan (OH, G)	June 24
5.1.3.5	Establish career paths for direct support employees.	Program Plan: OHCP (OH), HR Plan (OH)	June 24
5.1.4.4	Review job descriptions for language that is inclusive, understandable and inviting to diverse readers.	Cultural Competency Plan (G)	June 24
5.2.1.2	Collaborate with the business units to automate and streamline the recruiting processes where logical.	IT Plan (OH)	June 24
5.2.1.4	Integrate existing onboarding strategies with individualized department needs in a structured approach.	Program Plan: OHC (OH)	June 24
5.2.2.4	Maintain and expand Professional Development based on staff needs and interests. Develop new teacher orientation training.	Program Plan: OHS (OH)	June 24
5.2.3.2	Collaborate with the business units to automate and streamline the on/off-boarding processes where logical.	IT Plan (OH)	June 24
5.3.1.2	Develop a training assessment tool specific to our program offerings.	Program Plan: OHC (OH)	June 24
5.3.2.1	Create a consistently updated Intranet resource that disseminates institutional knowledge, best practices, internal training initiatives and 3rd party training resources.	IT Plan (G)	June 24
5.3.2.2	Periodically assess tools/platforms available and update to accurately reflect best practices and business requirements.	IT Plan (OH)	June 24
5.3.2.3	Support relevant Quality Assurance related training efforts of staff on documentation requirements identified in the needs assessment.	Quality Assurance Plan (OH, G)	June 24
5.3.2.5	Identify how other companies capture and disseminate organizational knowledge.	HR Plan (OH, G)	June 24
5.3.2.6	Cross train staff so that knowledge is not lost.	HR Plan (OH, G)	June 24
5.3.3.1	Regularly engage with staff to mentor and educate through on-the-job training.	Program Plan: OHC (OH)	June 24
5.3.4.3	Create training on philanthropic impact and each employee's role in its success.	Development Plan (OH, G)	June 24
5.3.4.4	Identify mission matches with each program to ensure maximum investment by our stakeholders.	Development Plan (OH, G)	June 24
5.3.4.5	Explore the creation and establishment of Oak Hill University.	HR Plan (OH)	June 24
5.3.5.1	Establish external partnerships with colleges and universities.	HR Plan (OH, G)	June 24
5.3.5.3	Identify and cultivate donors and grantors interested in investing in professional development programs.	Development Plan (OH, G)	June 24
5.4.1.1	Utilize system of record reports and internal QA surveys to analyze employee data and understand trends for a given time period.	IT Plan (G), Quality Assurance Plan (OH, G)	June 24

#	Intervention	Operational Plan	Target Date
5.4.1.2	Develop reporting automation based on source systems, amending as required by the business to provide business units the data needed to make thoughtful decisions.	IT Plan (OH)	June 24
5.4.1.3	Continue to analyze and encourage Lean processes to improve productivity and ensure that quality services are provided.	Program Plan: OHS (OH)	June 24
5.4.2.2	Communicate accessible avenues of advancement opportunities to staff.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (G)	June 24
5.4.2.3	Maintain and expand systems to encourage leadership at all staff levels.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
5.4.3.1	Ensure that the recipients of the mentorship program demonstrate competency in supporting people with disabilities.	Accessibility Plan (OH, G)	June 24
5.5.4.3	Educate all stakeholders of their roles in recognizing employees as outlined in the Employee Recognition Plan.	Development Plan (OH)	June 24

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## Appendix B: Interventions by Agency Plan

#	Intervention	Operational Plan	Target Date
<b>Accessibility (OH)</b>			
1.1.2.1	Develop and implement internal surveys designed to assess existing unmet needs among persons served (including all referrals). Ensure that the surveys themselves are accessible for people with disabilities.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.2	Assess needs of target populations that are not currently being served by any of our three organizations.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.3	Identify potential barriers, including physical ability, race, culture and digital accessibility (website, social media, etc..) that might prevent access to services.	Accessibility Plan (OH, G), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.4	Design and implement new programming and services to provide appropriate support for those unmet needs.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
1.4.2.1	Identify, develop and promote resources for adults with co-occurring disabilities (e.g., mental health and developmental disabilities).	Accessibility Plan (OH, G), Clinical Program Plan (G), Executive Plan (OH)	June 24
1.4.5.1	Develop methods to increase the people we serve's knowledge and understanding of available services.	Accessibility Plan (OH, G)	June 23
1.4.5.2	Develop an improved transportation program that includes gathering data, aligning Gilead and Oak Hill fleet management, establishing a semi-annual maintenance program and increasing efficiencies of fleet utilization.	Facilities Plan (OH), Facilities Plan (G), Accessibility Plan (OH, G)	June 24
1.4.5.3	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Accessibility Plan (OH, G)	June 24
1.4.5.4	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Facilities Plan (OH, G), Accessibility Plan (OH, G)	June 23
4.3.1.1	Compare data within the population served against the population of Connecticut or other relevant geographic areas to identify barriers in delivering services to under-represented members of the community.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.2	Research national programs with a focus on underserved populations to identify and replicate innovative new solutions.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24

#	Intervention	Operational Plan	Target Date
4.3.1.3	Research and access various federal relief funds available to populations served.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.2.1	Develop or expand existing services to provide targeted impact related to social determinants of health.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
4.3.2.2	Consider in-house resource center to refer and/or facilitate access to essential services (e.g., transportation, childcare, fitness, dental, mental and physical health).	Accessibility Plan (G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
4.3.2.3	Develop a plan to consistently and effectively provide interpretive services (ASL, Spanish, other language interpretation) to existing or potential service recipients.	Accessibility Plan (OH, G)	June 24
5.2.2.1	Create a training module providing education and information on how to interact with individuals with disabilities in a supportive and respectful manner, that also considers the roles and duties of each position.	Accessibility Plan (OH, G)	June 23
5.3.1.1	Ensure that ongoing training needs assessments are inclusive of the needs of individuals with disabilities and provides a universally designed environment.	Accessibility Plan (OH, G)	June 23
5.3.2.4	Ensure that the internal communication and training mechanisms are inclusive of the needs of individuals with disabilities, provides a universally designed environment, and happen on a recurring basis.	Accessibility Plan (OH, G)	June 23
5.4.3.1	Ensure that the recipients of the mentorship program demonstrate competency in supporting people with disabilities.	Accessibility Plan (OH, G)	June 24
<b>Accessibility (G)</b>			
1.1.2.1	Develop and implement internal surveys designed to assess existing unmet needs among persons served (including all referrals). Ensure that the surveys themselves are accessible for people with disabilities.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.2	Assess needs of target populations that are not currently being served by any of our three organizations.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.3	Identify potential barriers, including physical ability, race, culture and digital accessibility (website, social media, etc..) that might prevent access to services.	Accessibility Plan (OH, G), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.4	Design and implement new programming and services to provide appropriate support for those unmet needs.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24

#	Intervention	Operational Plan	Target Date
1.4.2.1	Identify, develop and promote resources for adults with co-occurring disabilities (e.g., mental health and developmental disabilities).	Accessibility Plan (OH, G), Clinical Program Plan (G), Executive Plan (OH)	June 24
1.4.5.1	Develop methods to increase the people we serve's knowledge and understanding of available services.	Accessibility Plan (OH, G)	June 23
1.4.5.2	Develop an improved transportation program that includes gathering data, aligning Gilead and Oak Hill fleet management, establishing a semi-annual maintenance program and increasing efficiencies of fleet utilization.	Facilities Plan (OH), Facilities Plan (G), Accessibility Plan (OH, G)	June 24
1.4.5.3	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Accessibility Plan (OH, G)	June 24
1.4.5.4	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Facilities Plan (OH, G), Accessibility Plan (OH, G)	June 23
4.3.1.1	Compare data within the population served against the population of Connecticut or other relevant geographic areas to identify barriers in delivering services to under-represented members of the community.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.2	Research national programs with a focus on underserved populations to identify and replicate innovative new solutions.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.3	Research and access various federal relief funds available to populations served.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.2.1	Develop or expand existing services to provide targeted impact related to social determinants of health.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
4.3.2.2	Consider in-house resource center to refer and/or facilitate access to essential services (e.g., transportation, childcare, fitness, dental, mental and physical health).	Accessibility Plan (G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
4.3.2.3	Develop a plan to consistently and effectively provide interpretive services (ASL, Spanish, other language interpretation) to existing or potential service recipients.	Accessibility Plan (OH, G)	June 24
5.2.2.1	Create a training module providing education and information on how to interact with individuals with disabilities in a supportive and respectful manner, that also considers the roles and duties of each position.	Accessibility Plan (OH, G)	June 23
5.3.1.1	Ensure that ongoing training needs assessments are inclusive of the needs of individuals with disabilities and provides a universally designed environment.	Accessibility Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
5.3.2.4	Ensure that the internal communication and training mechanisms are inclusive of the needs of individuals with disabilities, provides a universally designed environment, and happen on a recurring basis.	Accessibility Plan (OH, G)	June 23
5.4.3.1	Ensure that the recipients of the mentorship program demonstrate competency in supporting people with disabilities.	Accessibility Plan (OH, G)	June 24
<b>Corporate Compliance (G)</b>			
1.3.2.1	Implement outcome measures at the Gilead Farrell Treatment Center's Residential, IOP, and Outpatient programs and include specific outcomes for substance treatments.	Quality Assurance Plan (G), HR Plan (G), Corporate Compliance Plan (G)	June 24
1.3.2.2	Develop and implement outcome goals, objectives, and measures for Oak Hill's administrative departments that demonstrate their contribution to the achievement of the organization's mission.	Quality Assurance Plan (OH), HR Plan (OH), Corporate Compliance Plan (G)	June 24
<b>Cultural Competency (OH)</b>			
3.4.3.5	Execute action planning recommendations from Gilead and Oak Hill's DEI consultants into actionable targets and specific timeframes.	Cultural Competency Plan (OH, G)	June 23
5.1.2.1	Explore other methods of attracting a broader pool of candidates.	Program Plan: OHC (OH), Cultural Competency Plan (OH, G), HR Plan (OH)	June 22
5.1.2.2	Focus on affinity organizations (e.g., Association of Black Accountants), and other partnerships and internships to expand our recruitment to better attract diverse candidates for professional positions.	Program Plan: OHC (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 22
5.1.2.5	Establish quarterly review of demographic data in each department to determine where targeted efforts should be used to increase diversity.	HR Plan (OH), Cultural Competency Plan (OH)	June 22
5.1.3.1	Review and enhance competency-based recruitment strategies.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 23
5.1.3.2	Create work-life balance initiatives.	HR Plan (OH, G) Cultural Competency Plan (OH), Program Plan: OHCP (OH)	June 23
5.3.1.4	Create and review a training needs assessment in coordination with a DEI committee with a focus on inclusivity.	Cultural Competency Plan (OH, G)	June 23
<b>Cultural Competency (G)</b>			
1.3.2.8	Integrate this objective into the new DEI plan when it is developed.	Cultural Competency Plan (G)	June 24
1.4.2.6	Explore ways to adjust service offerings to provide access and interest specifically for people of color.	Cultural Competency Plan (G)	June 24



#	Intervention	Operational Plan	Target Date
1.4.5.7	Develop strategies to communicate with populations who may not ordinarily feel comfortable accessing mental health services.	Cultural Competency Plan (G)	June 24
3.4.3.1	Implement internal survey and evaluation strategies with specific questions designed to assess the organizational culture as it relates to diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24
3.4.3.2	Develop and implement at least one event within the organization that is intentionally designed to celebrate the importance of diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24
3.4.3.3	Underscore the importance of a common culture of learning by offering internal and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Cultural Competency Plan (G)	June 24
3.4.3.5	Execute action planning recommendations from Gilead and Oak Hill's DEI consultants into actionable targets and specific timeframes.	Cultural Competency Plan (OH, G)	June 23
5.1.2.1	Explore other methods of attracting a broader pool of candidates.	Program Plan: OHC (OH), Cultural Competency Plan (OH, G), HR Plan (OH)	June 22
5.1.2.2	Focus on affinity organizations (e.g., Association of Black Accountants), and other partnerships and internships to expand our recruitment to better attract diverse candidates for professional positions.	Program Plan: OHC (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 22
5.1.2.4	Explore the feasibility of organization operated services, like affordable daycare, as a way to attract and support a diverse staffing pool.	Cultural Competency Plan (G)	June 23
5.1.3.1	Review and enhance competency-based recruitment strategies.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 23
5.1.3.4	Investigate and develop recruitment strategies that are specific to ethnic, cultural and demographic groups.	Cultural Competency Plan (G)	June 22
5.1.4.4	Review job descriptions for language that is inclusive, understandable and inviting to diverse readers.	Cultural Competency Plan (G)	June 24
5.3.1.4	Create and review a training needs assessment in coordination with a DEI committee with a focus on inclusivity.	Cultural Competency Plan (OH, G)	June 23
5.3.3.3	Explore avenues to develop affinity or support groups that target traditionally neglected or overlooked groups.	Cultural Competency Plan (G)	June 23
5.3.3.4	Identify specific DEI training elements for supervisory staff.	Cultural Competency Plan (G)	June 22

#	Intervention	Operational Plan	Target Date
<b>Development (OH)</b>			
1.1.1.5	Develop (OH) or continue to enhance (G) a community outreach model that communicates each organization's impact, educates the community about our services while also learning about the range of services being offered both internally (among affiliate partners) and externally.	Development Plan (OH, G)	June 23
1.1.3.5	Develop a community outreach model that communicates the organization's community impact and educates about our services while also learning about range of services being offered by other providers.	Development Plan (OH, G)	June 24
1.2.1.1	Appoint one or more individuals to act as community outreach liaisons.	Clinical Program Plan (G), Development Plan (OH)	June 23
1.2.1.5	Enhance engagement opportunities to educate families and other social supports on the numerous ways they can get involved in our mission and how we may collaborate.	Development Plan (OH, G)	June 24
1.2.3.3	Evaluate resources necessary to support a strong volunteer program at Oak Hill and Gilead.	Development Plan (OH, G)	June 24
1.3.3.5	Develop a communication plan that effectively communicates organizational impact.	Development Plan (OH, G)	June 23
1.4.5.6	Research grant opportunities to fund cultural competency initiative.	HR Plan (OH), Development Plan (OH)	June 22
1.5.1.2	Develop a communication plan that effectively communicates organizational impact to all stakeholders.	Development Plan (OH, G)	June 23
1.5.2.1	Develop standards to ensure consistent external messaging.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 22
1.5.2.2	Develop marketing plan that will appropriately communicate to all stakeholders what we do and the scope of the program.	Program Plan: OHC (OH), Program Plan: OHS (OH), Clinical Program Plan (G), HR Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 24
1.6.1.3	Explore access and coordination with advocacy resources through Oak Hill (Staff Position and Consultant Resource).	Executive Plan (G), Development Plan (OH, G)	June 23
1.6.3.5	Create a Family Engagement Opportunity to educate families on the numerous ways they can invest in the organization's mission.	Development Plan (OH)	June 23
1.6.4.1	Create clear advocacy goals and evaluate the best investment strategy to meet those goals (i.e. hire a social media staff person, work with marketing and lobbying firms, etc..).	Development Plan (OH, G)	June 24
2.1.3.3	Use data from the evaluation process to assess the need for marketing investment and if relevant incorporate into the business plan.	Development Plan (OH, G)	June 23
2.1.5.2	Use data from the evaluation process to assess the need for grant funding and if relevant incorporate into the business plan.	Development Plan (G)	June 24
2.3.1.6	Create and provide engagement opportunities for existing and prospective donors that communicate impact.	Development Plan (OH, G)	June 24

#	Intervention	Operational Plan	Target Date
2.3.1.7	Prioritize donor renewal, retention and relationship building in all Annual Giving Program strategies.	Development Plan (OH, G)	June 23
2.3.2.2	Capitalize on the knowledge gained through Annual Giving Program strategies to target specific donors to engage as prospective major donors.	Development Plan (OH, G)	June 23
2.2.1.3	Use data from the evaluation process to assess the need for marketing investment and if relevant incorporate into the business plan	Development Plan (OH, G)	June 23
2.2.4.3	Participate in the business planning process if marketing has been prioritized as a fiscally prudent investment.	Development Plan (OH, G)	June 23
2.3.1.5	Become familiar with our existing donors and their knowledge of and investment in our mission.	Development Plan (OH, G)	June 24
2.3.2.3	Create and provide engagement opportunities for existing and prospective major donors that communicate impact.	Development Plan (OH, G)	June 24
2.3.3.1	Educate the organization's stakeholders about events and the need to evaluate their return on investment.	Development Plan (OH), HR Plan (OH), Information Technology (OH)	June 24
2.3.3.2	Create an annual event calendar for all three organizations.	Development Plan (OH, G)	June 23
2.3.4.1	Evaluate the current grant structure and resources to determine whether changes need to made to meet the demands of the entire organization.	Program Plan: OHCP (OH), Development Plan (OH, G)	June 24
2.3.5.1	Collaborate with Finance Team to create an educational module about the organization's philanthropic history, financial growth and use of donor funds.	Development Plan (OH)	June 24
2.3.6.4	Develop a training for all employees that highlights the history and role of philanthropy, cultivates positive engagement and nurtures a culture of thankfulness and recognition, beginning with New Employee Orientation.	Program Plan: OHCP (OH), Executive Plan (OH, G), Development (OH, G), HR Plan (OH, G)	June 23
2.3.6.5	Maintain and strengthen board and leadership knowledge of and role in creating a culture of philanthropy within the organization.	Development Plan (OH)	June 24
3.1.1.2	Create a process and timeline to examine, define, and differentiate the brands of all three organizations.	Development Plan (OH, G)	June 24
3.1.2.5	Involve stakeholders in discussion about existing brands, pros and cons of combined and or rebranding.	Development Plan (OH, G)	June 24
3.2.3.4	Develop integration plans based on integration initiative goals and long-term future intentions.	IT Plan (G), Development Plan (OH, G)	June 23
3.2.4.2	Create opportunities to collaborate using internal and external resources (such as SERC).	Development Plan (OH)	June 24
3.4.2.3	Work with SERC (State Education Resource Center of CT; DEI Consultant) to develop revised organizational core values.	Development Plan (OH, G)	June 24
3.4.4.1	Create or enhance an outreach strategy that both cultivates internal relationships, captures impact and illustrates by example each employee's role within our rich history of philanthropy.	Development Plan (OH, G)	June 24
3.5.3.2	Develop criteria and timeline to participate in at least one training, event or activity with other agencies to explore the potential for collaboration or partnership.	Executive Plan (OH, G), Development Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
3.5.3.4	Identify appropriate group to educate the Development Team about Oak Hill's desire to continue to partner with organizations looking for affiliation opportunities.	Development Plan (OH, G)	June 23
4.2.1.1	Integrate the need to educate around stigma into the Outreach and Communication Plans.	Development Plan (OH, G)	June 24
4.2.1.4	Integrate the issue of inadequate access to healthcare into the advocacy messaging campaign.	Development Plan (OH, G)	June 24
4.2.3.1	Integrate the need to educate around stigma into the Outreach and Communication Plans.	Development Plan (OH, G)	June 24
4.4.2.4	Integrate external communication position into discussions about and training on including inclusive language.	Development Plan (OH, G)	June 24
4.4.3.2	DEI Committee to develop plan.	Executive Plan (OH), Development Plan (OH, G)	June 22
5.1.3.3	Develop a communication plan that incorporates innovative ways to create and disseminate a powerful recruitment message.	Development Plan (OH, G)	June 23
5.3.4.3	Create training on philanthropic impact and each employee's role in its success.	Development Plan (OH, G)	June 24
5.3.4.4	Identify mission matches with each program to ensure maximum investment by our stakeholders.	Development Plan (OH, G)	June 24
5.3.5.3	Identify and cultivate donors and grantors interested in investing in professional development programs.	Development Plan (OH, G)	June 24
5.5.3.2	Create an employee recognition plan that clearly outlines methods of recognition, captures the success of this recognition, communicates the recognition internally and externally, outlines an available budget, outlines the role of each department and the board in this effort.	Development Plan (OH)	June 23
5.5.4.3	Educate all stakeholders of their roles in recognizing employees as outlined in the Employee Recognition Plan.	Development Plan (OH)	June 24
5.5.4.4	Communicate the impact of employee recognition.	Development Plan (OH)	June 22
<b>Development (G)</b>			
1.1.1.5	Develop (OH) or continue to enhance (G) a community outreach model that communicates each organization's impact, educates the community about our services while also learning about the range of services being offered both internally (among affiliate partners) and externally.	Development Plan (OH, G)	June 23
1.1.3.5	Develop a community outreach model that communicates the organization's community impact and educates about our services while also learning about range of services being offered by other providers.	Development Plan (OH, G)	June 24
1.2.1.5	Enhance engagement opportunities to educate families and other social supports on the numerous ways they can get involved in our mission and how we may collaborate.	Development Plan (OH, G)	June 24
1.2.3.3	Evaluate resources necessary to support a strong volunteer program at Oak Hill and Gilead.	Development Plan (OH, G)	June 24
1.3.3.5	Develop a communication plan that effectively communicates organizational impact.	Development Plan (OH, G)	June 23
1.5.1.2	Develop a communication plan that effectively communicates organizational impact to all stakeholders.	Development Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
1.5.2.1	Develop standards to ensure consistent external messaging.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 22
1.5.2.2	Develop marketing plan that will appropriately communicate to all stakeholders what we do and the scope of the program.	Program Plan: OHC (OH), Program Plan: OHS (OH), Clinical Program Plan (G), HR Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 24
1.6.1.3	Explore access and coordination with advocacy resources through Oak Hill (Staff Position and Consultant Resource).	Executive Plan (G), Development Plan (OH, G)	June 23
1.6.3.6	Integrate advocacy campaign messaging into the Communication Plan.	Development Plan (G)	June 22
1.6.4.1	Create clear advocacy goals and evaluate the best investment strategy to meet those goals (i.e. hire a social media staff person, work with marketing and lobbying firms, etc..).	Development Plan (OH, G)	June 24
2.1.3.3	Use data from the evaluation process to assess the need for marketing investment and if relevant incorporate into the business plan.	Development Plan (OH, G)	June 23
2.1.5.2	Use data from the evaluation process to assess the need for grant funding and if relevant incorporate into the business plan.	Development Plan (G)	June 24
2.2.1.3	Use data from the evaluation process to assess the need for marketing investment and if relevant incorporate into the business plan	Development Plan (OH, G)	June 23
2.2.4.3	Participate in the business planning process if marketing has been prioritized as a fiscally prudent investment.	Development Plan (OH, G)	June 23
2.3.1.5	Become familiar with our existing donors and their knowledge of and investment in our mission.	Development Plan (OH, G)	June 24
2.3.1.6	Create and provide engagement opportunities for existing and prospective donors that communicate impact.	Development Plan (OH, G)	June 24
2.3.1.7	Prioritize donor renewal, retention and relationship building in all Annual Giving Program strategies.	Development Plan (OH, G)	June 23
2.3.2.2	Capitalize on the knowledge gained through Annual Giving Program strategies to target specific donors to engage as prospective major donors.	Development Plan (OH, G)	June 23
2.3.2.3	Create and provide engagement opportunities for existing and prospective major donors that communicate impact.	Development Plan (OH, G)	June 24
2.3.3.2	Create an annual event calendar for all three organizations.	Development Plan (OH, G)	June 23
2.3.3.3	Evaluate Gilead's events strategy to determine return on investment.	Development Plan (G)	June 23
2.3.4.1	Evaluate the current grant structure and resources to determine whether changes need to made to meet the demands of the entire organization.	Program Plan: OHCP (OH), Development Plan (OH, G)	June 24
2.3.5.2	Work with Finance Committee and Finance Team to review endowment investment strategy and growth goals.	Development Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
2.3.6.1	Engage the boards in routine outreach to thank existing donors at all levels.	Development Plan (G), Executive Plan (OH)	June 24
2.3.6.2	Raise donor awareness of organizational mission and service offerings.	Development Plan (G), Executive Plan (OH)	June 24
2.3.6.4	Develop a training for all employees that highlights the history and role of philanthropy, cultivates positive engagement and nurtures a culture of thankfulness and recognition, beginning with New Employee Orientation.	Program Plan: OHCP (OH), Executive Plan (OH, G), Development (OH, G), HR Plan (OH, G)	June 23
3.1.1.2	Create a process and timeline to examine, define, and differentiate the brands of all three organizations.	Development Plan (OH, G)	June 24
3.1.2.5	Involve stakeholders in discussion about existing brands, pros and cons of combined and or rebranding.	Development Plan (OH, G)	June 24
3.2.3.4	Develop integration plans based on integration initiative goals and long-term future intentions.	IT Plan (G), Development Plan (OH, G)	June 23
3.4.2.3	Work with SERC (State Education Resource Center of CT; DEI Consultant) to develop revised organizational core values.	Development Plan (OH, G)	June 24
3.4.4.1	Create or enhance an outreach strategy that both cultivates internal relationships, captures impact and illustrates by example each employee's role within our rich history of philanthropy.	Development Plan (OH, G)	June 24
3.5.3.2	Develop criteria and timeline to participate in at least one training, event or activity with other agencies to explore the potential for collaboration or partnership.	Executive Plan (OH, G), Development Plan (G)	June 23
3.5.3.4	Identify appropriate group to educate the Development Team about Oak Hill's desire to continue to partner with organizations looking for affiliation opportunities.	Development Plan (OH, G)	June 23
4.2.1.1	Integrate the need to educate around stigma into the Outreach and Communication Plans.	Development Plan (OH, G)	June 24
4.2.1.4	Integrate the issue of inadequate access to healthcare into the advocacy messaging campaign.	Development Plan (OH, G)	June 24
4.2.3.1	Integrate the need to educate around stigma into the Outreach and Communication Plans.	Development Plan (OH, G)	June 24
4.4.2.3	Hire a Communications Director to focus on internal communications and collaborate with Development Department on external communications, including an emphasis on inclusive communication.	Executive Plan (OH, G), Development Plan (G), HR Plan (OH)	June 24
4.4.2.4	Integrate external communication position into discussions about and training on including inclusive language.	Development Plan (OH, G)	June 24
4.4.3.2	DEI Committee to develop plan.	Executive Plan (OH), Development Plan (OH, G)	June 22
4.5.4.2	Develop a communication plan that includes emphasis on innovative ways to create and disseminate a powerful recruitment message.	Development Plan (G)	June 24
5.1.3.3	Develop a communication plan that incorporates innovative ways to create and disseminate a powerful recruitment message.	Development Plan (OH, G)	June 23
5.3.4.3	Create training on philanthropic impact and each employee's role in its success.	Development Plan (OH, G)	June 24

#	Intervention	Operational Plan	Target Date
5.3.4.4	Identify mission matches with each program to ensure maximum investment by our stakeholders.	Development Plan (OH, G)	June 24
5.3.5.3	Identify and cultivate donors and grantors interested in investing in professional development programs.	Development Plan (OH, G)	June 24
5.5.3.1	Develop strategies/programs for tying compensation to a review process that rates performance and experience, while also identifying areas for growth and future goals.	Executive Plan (OH), HR Plan (OH, G), Development Plan (G)	June 23
5.5.4.1	Look for ways to invite board members to honor and thank employees.	Development Plan (G), Executive Plan (OH)	June 23
<b>Executive (OH)</b>			
1.3.3.6	Continue to promote and educate managers on culture of data management and provide data through reports by start of FY23.	Executive Plan (OH)	June 22
1.4.1.7	Implement a new executive level role at Oak Hill to promote increased collaboration and program development.	Executive Plan (OH)	June 22
1.4.2.1	Identify, develop and promote resources for adults with co-occurring disabilities (e.g., mental health and developmental disabilities).	Accessibility Plan (OH, G), Clinical Program Plan (G), Executive Plan (OH)	June 24
1.4.2.3	Develop at least one new organizational relationship that provides input related to the needs of the community.	Executive Plan (OH)	June 23
1.4.2.5	Provide a calendar of training offerings as part of the organization's professional development efforts to provide effective tools for our staff related to diversity, equity and inclusion.	Program Plan: OHCP (OH), HR Plan (OH), Executive Plan (OH)	June 22
1.4.3.6	Develop a business plan to increase utilization and profitability of Camp Hemlocks.	Executive Plan (OH)	June 22
1.4.4.5	Review program expansion concepts at least quarterly through the Senior Program Leadership Team Meetings.	Executive Plan (OH)	June 22
1.5.2.1	Develop standards to ensure consistent external messaging.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 22
1.5.2.2	Develop marketing plan that will appropriately communicate to all stakeholders what we do and the scope of the program.	Program Plan: OHC (OH), Program Plan: OHS (OH), Clinical Program Plan (G), HR Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 24
1.5.3.1	Develop a mandatory training that ensures all employees understand the services that we offer and how they can be accessed.	Executive Plan (OH, G), Clinical Program Plan (G)	June 23
1.5.3.2	Identify programming across all three organizations in which a standardized referral and intake process could create synergies to improve program access and clarify outreach efforts.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH)	June 24

#	Intervention	Operational Plan	Target Date
1.5.3.3	Reach out to consumers and family members, especially younger parents, directly to share our service offerings and discuss their support needs.	Clinical Program Plan (G), Executive Plan (OH)	June 23
1.6.1.1	Undertake a major public relations campaign to enable voters to understand the value of our nonprofit provided services.	Executive Plan (OH)	June 22
1.6.1.2	Develop and implement a strategy to increase voter and legislator awareness of the importance of adequate state funding of programs for the individuals we serve.	Executive Plan (OH)	June 22
1.6.2.2	Engage with the other CT Easterseals agencies.	Executive Plan (OH)	June 22
1.6.3.7	Offer 1-2 public policy training sessions per year and provide access to other training opportunities as available.	Executive Plan (OH), Public Policy Plan (OH)	June 22
1.6.4.2	Establish regular board advocacy committee meetings and leverage relationship with Gaffney Bennett Associates, Inc.	Executive Plan (OH)	June 22
2.2.4.1	Establish a core business planning team that will evaluate and select the most appropriate tool to be utilized with all new business needs.	Executive Plan (OH)	June 23
2.3.1.1	Create opportunities for donors at all economic levels.	Executive Plan (OH)	June 22
2.3.1.2	Engage grateful parents to share their stories with potential donors.	Executive Plan (OH)	June 22
2.3.1.3	Offer symposia to existing donors on exciting state of the art activities and coming attractions in our field to invite feedback and discussion.	Executive Plan (OH)	June 22
2.3.2.1	Appoint an advisory committee of Oak Hill and Gilead donors to explore strategies and procedures to expand fundraising capacity.	Executive Plan (OH)	June 22
2.3.6.1	Engage the boards in routine outreach to thank existing donors at all levels.	Development Plan (G), Executive Plan (OH)	June 24
2.3.6.2	Raise donor awareness of organizational mission and service offerings.	Development Plan (G), Executive Plan (OH)	June 24
2.3.6.4	Develop a training for all employees that highlights the history and role of philanthropy, cultivates positive engagement and nurtures a culture of thankfulness and recognition, beginning with New Employee Orientation.	Program Plan: OHCP (OH), Executive Plan (OH, G), Development (OH, G), HR Plan (OH, G)	June 23
2.5.4.1	Develop visitation plan with elected officials, public policy and appointed department heads.	Executive Plan (OH, G)	June 22
3.1.1.1	Coordinate an annual leadership retreat to engage all 3 boards and all 3 leadership teams in vision development.	Executive Plan (OH, G)	June 23
3.1.1.3	Form an integrated committee by end FY22 consisting of Board Chairs, CEOs and Board members.	Executive Plan (OH, G)	June 22
3.1.2.1	Utilizing each brand's personality, purposes and points of difference, research and implement marketing plans, development plans and public relations campaigns to highlight brand and service offerings and impact.	Program Plan: OHC (OH), Executive Plan (OH), HR Plan (OH, G)	June 23
3.1.2.2	Utilizing each brand's personality, purposes and points of difference, advance advocacy efforts collectively and separately, as appropriate.	Program Plan: OHC (OH), HR Plan (OH), Executive Plan (OH)	June 23



#	Intervention	Operational Plan	Target Date
3.2.1.1	Collaborate with boards to identify a priority list of key factors that need to be established or maintained in order for an alternative corporate structure to be effective (e.g., the pillars document used during the affiliation discussion).	Executive Plan (OH, G)	June 23
3.2.1.5	Form a committee to explore changes in corporate structure.	Executive Plan (OH)	June 22
3.2.2.4	Identify and integrate at least 3 key functions within each of the administrative departments.	HR Plan (OH, G), Executive Plan (OH)	June 22
3.2.3.1	Explore the integration of existing and new meetings and committees for programmatic, administrative, and training purposes, where appropriate.	Facilities Plan (G), HR Plan (OH, G), Executive Plan (OH)	June 24
3.2.3.2	Implement technological tools and systems across all three organizations to improve collaboration and improve efficiencies.	IT Plan (OH), Executive Plan (OH), Facilities Plan (OH, G)	June 24
3.2.4.3	Develop timeline and plan a retreat on governance or EDI work during FY22-23.	Executive Plan (OH)	June 22
3.3.2.1	Explore opportunities to create new programs that integrate the services and resources of the affiliated organizations.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Executive Plan (OH)	June 24
3.3.2.2	Provide thorough education about the organizations' programs and services to upper and middle management.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Executive Plan (OH)	June 23
3.3.2.4	Develop a collaborative programmatic team that includes "middle managers" from all 3 agencies.	Program Plan: OHCP (OH), Executive Plan (G)	June 23
3.3.3.1	Develop a project description and action plan for each of the project priorities that have been identified by the integrated Senior Program Leadership Team.	Program Plan: OHCP (OH), Executive Plan (OH, G)	June 22
3.3.3.2	Identify a project lead and targeted completion date for each of the identified priorities, in partnership with the Oak Hill and Gilead Executive Leadership Team.	Program Plan: OHCP (OH), Executive Plan (OH, G)	June 23
3.3.3.3	Evaluate the financial investment required for each of the identified priority along with a projected future financial impact for the organization.	Executive Plan (OH, G)	June 23
3.4.2.1	Identify the customs, beliefs, and values of each organization.	HR Plan (OH), Executive Plan (OH)	June 22
3.4.2.2	Integrate the concepts of justice, access and serving the whole person as part of each organization's core values.	HR Plan (G), Executive Plan (OH)	June 22
3.5.1.2	Identify and Develop Gilead and OH's growth vision for the next 3-6 years (2 strategic plan cycles).	Executive Plan (OH, G)	June 23
3.5.1.4	Hold blue sky retreat in FY23.	Executive Plan (OH)	June 23
3.5.1.4	Develop format and methodology for conducting a service delivery SWOT to identify potential needs for partners/affiliations/mergers.	Executive Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
3.5.1.5	Leverage current survey development tools in QA to survey payers and the people we serve of services wanted as part of satisfaction survey.	Executive Plan (OH)	June 22
3.5.1.6	Develop format and methodology for senior managers to report back on National trends.	Executive Plan (OH)	June 22
3.5.2.1	Develop format and methodology for identifying potential third party brokers who could facilitate collaborative arrangements.	Executive Plan (OH)	June 22
3.5.3.1	Develop criteria and timeline to initiate contact with at least one external agency to explore the potential for an affiliation, merger or acquisition that would further expand the continuum of care offered by the organization.	Executive Plan (OH)	June 22
3.5.3.2	Develop criteria and timeline to participate in at least one training, event or activity with other agencies to explore the potential for collaboration or partnership.	Executive Plan (OH, G), Development Plan (G)	June 23
3.5.3.3	Evaluate the efficacy of, and then approach, the professional medical and health insurance communities, and state government agencies to become the go-to partner to provide essential services.	Executive Plan (OH)	June 22
3.5.3.5	Evaluate corporate structure in order to facilitate affiliations that advance the organization's mission.	HR Plan (OH, G), Facilities Plan (OH), Executive Plan (OH)	June 23
4.1.2.1	Create a staff and a management training to strengthen a diversity, equity and inclusion focus that emphasizes anti-biased strategies across the organization.	HR Plan (OH, G), Executive Plan (OH, G)	June 23
4.1.2.2	Utilize external training resources as needed to enhance supervisory skills that foster trust and belonging for all staff.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
4.4.2.3	Hire a Communications Director to focus on internal communications and collaborate with Development Department on external communications, including an emphasis on inclusive communication.	Executive Plan (OH, G), Development Plan (G), HR Plan (OH)	June 24
4.4.3.2	DEI Committee to develop plan.	Executive Plan (OH), Development Plan (OH, G)	June 22
4.5.4.3	Conduct Board Assessment annually as part of recruitment process.	Executive Plan (OH, G)	June 22
5.3.4.2	Develop an enhanced Tuition Reimbursement program that covers a higher portion of master's degree coursework.	Executive Plan (OH, G)	June 23
5.4.3.3	Develop a strategy and implementation plan for a mentorship program as part of the Professional Development Committee work.	Executive Plan (OH)	June 22
5.5.1.1	Establish staff appreciation events to celebrate the achievements of all staff and recognize outstanding achievements.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
5.5.1.2	Recognize special dates like work anniversaries.	Executive Plan (OH)	June 22

#	Intervention	Operational Plan	Target Date
5.5.2.1	Provide occasional personal, handwritten notes from the CEO recognizing a frontline employee's work and accomplishments.	Program Plan: OHC (OH), Executive Plan (OH) HR Plan (OH)	June 22
5.5.3.1	Develop strategies/programs for tying compensation to a review process that rates performance and experience, while also identifying areas for growth and future goals.	Executive Plan (OH), HR Plan (OH, G), Development Plan (G)	June 23
5.5.4.1	Look for ways to invite board members to honor and thank employees.	Development Plan (G), Executive Plan (OH)	June 23
5.5.4.2	Encourage the board and development department to maintain staff appreciation as a priority in fundraising efforts.	Executive Plan (OH)	June 22
<b>Executive (G)</b>			
1.3.3.4	Continue to communicate Gilead Outcome Measure Results through the Gilead Intranet Page and through an annual summary communication to all stakeholders.	Executive Plan (G)	June 22
1.4.1.3	Attend existing Clinical Rounds meetings twice per year to discuss recommendations for service innovation and expansion.	Executive Plan (G)	June 23
1.4.3.3	Add one new billable service to Gilead's Outpatient Services (MOPC, Chester OPC, Farrell OPC or MHRC).	Executive Plan (G)	June 23
1.4.4.4	Evaluate all program expansion proposals and move forward with at least one new proposal, if viable.	Executive Plan (G)	June 23
1.5.2.4	Identify and add at least one new communication strategy to enhance the public's understanding of our services.	Executive Plan (G)	June 23
1.5.3.1	Develop a mandatory training that ensures all employees understand the services that we offer and how they can be accessed.	Executive Plan (OH, G), Clinical Program Plan (G)	June 23
1.6.1.3	Explore access and coordination with advocacy resources through Oak Hill (Staff Position and Consultant Resource).	Executive Plan (G), Development Plan (OH, G)	June 23
1.6.2.1	Utilize existing supporter database to communicate about various advocacy issues as needed.	Executive Plan (G)	June 22
1.6.3.2	Develop and implement an Advocacy Training for staff and external stakeholders.	Executive Plan (G)	June 23
1.6.5.1	Develop a model for MHRC program replication in other parts of the state.	Executive Plan (G)	June 23
2.3.1.4	Evaluate the need for additional resources on the Development Team in order to strategically advance our Annual Giving.	Executive Plan (G)	June 23
2.3.6.4	Develop a training for all employees that highlights the history and role of philanthropy, cultivates positive engagement and nurtures a culture of thankfulness and recognition, beginning with New Employee Orientation.	Program Plan: OHCP (OH), Executive Plan (OH, G), Development (OH, G), HR Plan (OH, G)	June 23
2.5.4.1	Develop visitation plan with elected officials, public policy and appointed department heads.	Executive Plan (OH, G)	June 22
2.5.4.2	Explore access and coordination with advocacy resources through Oak Hill (Staff Position and Lobbyist Resource).	Executive Plan (G)	June 23
3.1.1.1	Coordinate an annual leadership retreat to engage all 3 boards and all 3 leadership teams in vision development.	Executive Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
3.1.1.3	Form an integrated committee by end FY22 consisting of Board Chairs, CEOs and Board members.	Executive Plan (OH, G)	June 22
3.2.1.1	Collaborate with boards to identify a priority list of key factors that need to be established or maintained in order for an alternative corporate structure to be effective (e.g., the pillars document used during the affiliation discussion).	Executive Plan (OH, G)	June 23
3.2.3.7	Complete an assessment of existing administrative integration including future recommendations.	Executive Plan (G)	June 23
3.2.4.1	Conduct at least one "combined" board meeting annually.	Executive Plan (G)	June 23
3.3.3.1	Develop a project description and action plan for each of the project priorities that have been identified by the integrated Senior Program Leadership Team.	Program Plan: OHCP (OH), Executive Plan (OH, G)	June 22
3.3.3.2	Identify a project lead and targeted completion date for each of the identified priorities, in partnership with the Oak Hill and Gilead Executive Leadership Team.	Program Plan: OHCP (OH), Executive Plan (OH, G)	June 23
3.3.3.3	Evaluate the financial investment required for each of the identified priority along with a projected future financial impact for the organization.	Executive Plan (OH, G)	June 23
3.4.2.4	Coordinate an annual leadership retreat to engage all 3 boards and all 3 leadership teams in vision development (same as 3.1.1.1).	Executive Plan (G)	June 23
3.5.1.2	Identify and Develop Gilead and OH's growth vision for the next 3-6 years (2 strategic plan cycles).	Executive Plan (OH, G)	June 23
3.5.1.4	Develop format and methodology for conducting a service delivery SWOT to identify potential needs for partners/affiliations/mergers.	Executive Plan (OH, G)	June 23
3.5.3.2	Develop criteria and timeline to participate in at least one training, event or activity with other agencies to explore the potential for collaboration or partnership.	Executive Plan (OH, G), Development Plan (G)	June 23
4.1.1.2	Create and communicate, internally and externally, a vision statement to promote a culture of inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (G)	June 24
4.1.2.1	Create a staff and a management training to strengthen a diversity, equity and inclusion focus that emphasizes anti-biased strategies across the organization.	HR Plan (OH, G), Executive Plan (OH, G)	June 23
4.1.3.1	Conduct yearly reviews of diversity of workforce compared to diversity of Connecticut and the relevant geographical area.	HR Plan (OH, G), Executive Plan (OH, G)	June 22
4.1.3.5	Work with SERC to identify status of DEI initiative at least annually.	Executive Plan (G)	June 22
4.3.3.3	Create a compensation plan with the goal of enhancing compensation across the organization.	Executive Plan (OH, G)	June 23
4.4.1.3	Design and implement a process for evaluating all Organizational Policies related to inclusive communication that values diversity and equity.	Executive Plan (G)	June 23
4.4.2.3	Hire a Communications Director to focus on internal communications and collaborate with Development Department on external communications, including an emphasis on inclusive communication.	Executive Plan (OH, G), Development Plan (G), HR Plan (OH)	June 24

#	Intervention	Operational Plan	Target Date
4.4.3.1	Develop a communications training for Gilead Staff who are involved in external communication.	Executive Plan (G)	June 23
4.5.4.1	Develop a board recruitment manual that guides current and future board recruitment.	Executive Plan (G)	June 23
4.5.4.3	Conduct Board Assessment annually as part of recruitment process.	Executive Plan (OH, G)	June 22
5.3.3.2	Implement a consistent management training program for both new manager and existing managers.	Executive Plan (G)	June 23
5.3.4.2	Develop an enhanced Tuition Reimbursement program that covers a higher portion of master's degree coursework.	Executive Plan (OH, G)	June 23
5.4.3.2	Design and implement an organizational Leadership Program to prepare employees for both middle and executive management roles.	Executive Plan (G)	June 23
5.4.4.1	Review and enhance the organization's current succession plan in order to identify and cultivate talent within the organization.	Executive Plan (G)	June 23
5.5.1.4	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23
5.5.2.3	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23
5.5.3.3	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23
5.5.4.5	Review existing recognition program to identify ways to further enhance the program.	Executive Plan (G)	June 23
<b>Facilities (OH)</b>			
1.2.2.1	Partner with the CT Nonprofit Alliance to regularly engage board members and family members for advocacy purposes.	Program Plan: OHCP (OH), Facilities Plan (OH)	June 23
1.4.5.2	Develop an improved transportation program that includes gathering data, aligning Gilead and Oak Hill fleet management, establishing a semi-annual maintenance program and increasing efficiencies of fleet utilization.	Facilities Plan (OH), Facilities Plan (G), Accessibility Plan (OH, G)	June 24
1.4.5.4	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Facilities Plan (OH, G), Accessibility Plan (OH, G)	June 23
2.5.1.2	Identify two opportunities to provide consulting services or administrative support services to other nonprofits, including financial analysis (e.g., training, group home maintenance, fiscal recordkeeping).	Finance MGT Plan (OH, G), HR Plan (OH, G), Facilities Plan (OH, G)	June 23
3.2.3.2	Implement technological tools and systems across all three organizations to improve collaboration and improve efficiencies.	IT Plan (OH), Executive Plan (OH), Facilities Plan (OH, G)	June 24
3.2.3.6	Develop recommendations for targeted area where Work Order system could benefit the entire organization.	Facilities Plan (OH, G)	June 23
3.5.3.5	Evaluate corporate structure in order to facilitate affiliations that advance the organization's mission.	HR Plan (OH, G), Facilities Plan (OH), Executive Plan (OH)	June 23
<b>Facilities (G)</b>			
1.4.5.2	Develop an improved transportation program that includes gathering data, aligning Gilead and Oak Hill fleet management, establishing a semi-annual maintenance program and increasing efficiencies of fleet utilization.	Facilities Plan (OH), Facilities Plan (G), Accessibility Plan (OH, G)	June 24

#	Intervention	Operational Plan	Target Date
1.4.5.4	Develop a repository of resources, programs, and services that are accessible to the people we serve, families, and staff.	Facilities Plan (OH, G), Accessibility Plan (OH, G)	June 23
2.5.1.2	Identify two opportunities to provide consulting services or administrative support services to other nonprofits, including financial analysis (e.g., training, group home maintenance, fiscal recordkeeping).	Finance MGT Plan (OH, G), HR Plan (OH, G), Facilities Plan (OH, G)	June 23
3.2.2.2	Share vendors across departments, where appropriate.	Facilities Plan (G)	June 24
3.2.3.1	Explore the integration of existing and new meetings and committees for programmatic, administrative, and training purposes, where appropriate.	Facilities Plan (G), HR Plan (OH, G), Executive Plan (OH)	June 24
3.2.3.2	Implement technological tools and systems across all three organizations to improve collaboration and improve efficiencies.	IT Plan (OH), Executive Plan (OH), Facilities Plan (OH, G)	June 24
3.2.3.5	Identify facility trainings that can be shared across departments and apply them to the appropriate training platform as needed.	Facilities Plan (G)	June 24
3.2.3.6	Develop recommendations for targeted area where Work Order system could benefit the entire organization.	Facilities Plan (OH, G)	June 23
<b>Finance Management (OH)</b>			
1.3.1.2	Implement a budgeting process to compare historical staffing ratios to current needs and funding levels.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 22
1.3.3.3	Provide monthly actual vs budget reports per program to analyze the impact of implemented outcome measures on program financials.	Finance MGT Plan (OH, G)	June 22
1.4.3.2	Provide financial staff support to programming departments developing business plans for new private pay services. (i.e. budget, costs analysis, pricing, etc..).	Finance MGT Plan (OH, G)	June 23
1.4.4.2	Research costs vs potential revenue and demand for expanded services to identify potential long-term positive financial impact on the organization.	Finance MGT Plan (OH, G)	June 23
2.1.1.1	Hold team/ department meetings to identify unpaid services and research other funding mechanisms (e.g., Grants, Contracts, Fundraising, etc..) to help pay for these needed services. Additional discussions around rate settings can also be held.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.1.2.2	Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
2.1.3.2	Assess existing services to ensure they align with current market need.	Finance MGT Plan (OH, G)	June 23
2.1.4.3	Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 24
2.1.4.4	Develop a process for evaluating the need to reduce or discontinued unfunded or underfunded services as needed.	Finance MGT Plan (OH, G)	June 24
2.1.5.1	Provide data on fiscally underperforming programs, or potential expanding services to assist in the grant evaluation process.	Finance MGT Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
2.2.1.2	With all new programming being considered, identify all possible funding methods (e.g., governmental, private insurance, private pay, private grants, etc.), or other pricing strategies to help determine fiscal viability.	Finance MGT Plan (OH, G)	June 23
2.2.2.1	Provide financial data to determine any gaps in funding to assist in the grant evaluation process.	Finance MGT Plan (OH, G)	June 23
2.2.3.2	Determine key performance indicators for each service type which will allow us to analyze profitability and return on investment.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.2.4.2	Participate in a multi-department business planning process by applying analytical financial research and studies to provide financial data to assist the decision-making process.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.4.1.3	Identify billing areas to monitor for lost revenue opportunities (e.g., day service authorizations vs. actual billed services).	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 22
2.4.1.4	Identify areas to monitor for revenue gain opportunities (e.g., productivity percentages for billable employees).	Finance MGT Plan (OH, G), Quality Assurance Plan (OH, G)	June 22
2.4.2.1	Discuss with program leaders to help identify financial knowledge gaps with staff to help develop an appropriate training program that targets these needs.	Finance MGT Plan (OH, G)	June 22
2.4.2.2	Implement a training program, across all levels of the organization (NEO, Management Training & program staff meetings).	Finance MGT Plan (OH, G), HR (OH, G)	June 22
2.4.3.1	Determine financial key performance indicators (KPI) by service type.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.3.2	Review KPIs monthly and provide actionable steps if needed to the Finance Department.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G), Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.5.1.1	Identify two opportunities, per service type, for private pay services or government funded and explore the viability of pursuing those services, including financial analysis.	Clinical Program Plan (G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
2.5.1.2	Identify two opportunities to provide consulting services or administrative support services to other nonprofits, including financial analysis (e.g., training, group home maintenance, fiscal recordkeeping).	Finance MGT Plan (OH, G), HR Plan (OH, G), Facilities Plan (OH, G)	June 23
2.5.2.1	Consult financial experts with knowledge of non-profit finance management, third party billing, and revenue generation.	Program Plan: OHC (OH), Finance MGT Plan (OH, G)	June 23
2.5.2.2	Through business planning, evaluate the possibilities of new billable revenue opportunities (i.e.: Outpatient Clinic in Hartford, Addiction Services in Middletown, etc.).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Finance MGT Plan (OH, G)	June 23
2.5.2.3	Provide financial analysis on identified new revenue opportunities.	Finance MGT Plan (OH, G)	June 23
2.5.3.2	Perform lost revenue analysis on all programming/services currently being provided to help identify reasons or roadblocks to achieve maximum billing. Monitor and take action on productivity percentages vs. established benchmarks and budgets.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
3.1.2.4	Develop a working budget, in coordination with relevant parties, to monitor internal and external costs related to brand development (e.g., consultants, third parties, personnel time, etc.).	Finance MGT Plan (OH, G)	June 23
3.2.2.3	Consider restructuring current responsibilities, or improve cross-training to enable staff to better support all departments.	Finance MGT Plan (OH, G)	June 23
3.5.2.3	Develop a format and methodology for reviewing publicly available financial data of prospective partners identified.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
3.5.2.4	Evaluate any and all financial impacts of existing and/or future affiliations such as cost saving opportunities, tax/audit, treasury, or credit implications and entity related government filings.	Finance MGT Plan (OH, G)	June 23
4.3.3.2	Provide cost analysis on enhanced wages/benefits to identify increased revenues needed organization-wide to support these enhancements. Continue to identify cost savings in other areas to help overcome economic barriers.	Finance MGT Plan (OH, G)	June 23
5.3.5.2	Actively participate in the grant seeking and development process.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
5.5.1.3	Provide cost analysis to identified events or recognition and identify special funding available to determine feasibility of purposed activities.	Finance MGT Plan (OH, G)	June 23
<b>Finance Management (G)</b>			
1.3.1.2	Implement a budgeting process to compare historical staffing ratios to current needs and funding levels.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 22
1.3.3.3	Provide monthly actual vs budget reports per program to analyze the impact of implemented outcome measures on program financials.	Finance MGT Plan (OH, G)	June 22
1.4.3.2	Provide financial staff support to programming departments developing business plans for new private pay services. (i.e. budget, costs analysis, pricing, etc.).	Finance MGT Plan (OH, G)	June 23



#	Intervention	Operational Plan	Target Date
1.4.4.2	Research costs vs potential revenue and demand for expanded services to identify potential long-term positive financial impact on the organization.	Finance MGT Plan (OH, G)	June 23
2.1.1.1	Hold team/ department meetings to identify unpaid services and research other funding mechanisms (e.g., Grants, Contracts, Fundraising, etc..) to help pay for these needed services. Additional discussions around rate settings can also be held.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.1.2.2	Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
2.1.3.2	Assess existing services to ensure they align with current market need.	Finance MGT Plan (OH, G)	June 23
2.1.4.3	Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 24
2.1.4.4	Develop a process for evaluating the need to reduce or discontinued unfunded or underfunded services as needed.	Finance MGT Plan (OH, G)	June 24
2.1.5.1	Provide data on fiscally underperforming programs, or potential expanding services to assist in the grant evaluation process.	Finance MGT Plan (OH, G)	June 23
2.2.1.2	With all new programming being considered, identify all possible funding methods (e.g., governmental, private insurance, private pay, private grants, etc.), or other pricing strategies to help determine fiscal viability.	Finance MGT Plan (OH, G)	June 23
2.2.2.1	Provide financial data to determine any gaps in funding to assist in the grant evaluation process.	Finance MGT Plan (OH, G)	June 23
2.2.3.2	Determine key performance indicators for each service type which will allow us to analyze profitability and return on investment.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.2.4.2	Participate in a multi-department business planning process by applying analytical financial research and studies to provide financial data to assist the decision-making process.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.4.1.3	Identify billing areas to monitor for lost revenue opportunities (e.g., day service authorizations vs. actual billed services).	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 22
2.4.1.4	Identify areas to monitor for revenue gain opportunities (e.g., productivity percentages for billable employees).	Finance MGT Plan (OH, G), Quality Assurance Plan (OH, G)	June 22
2.4.2.1	Discuss with program leaders to help identify financial knowledge gaps with staff to help develop an appropriate training program that targets these needs.	Finance MGT Plan (OH, G)	June 22
2.4.2.2	Implement a training program, across all levels of the organization (NEO, Management Training & program staff meetings).	Finance MGT Plan (OH, G), HR (OH, G)	June 22
2.4.3.1	Determine financial key performance indicators (KPI) by service type.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
2.4.3.2	Review KPIs monthly and provide actionable steps if needed to the Finance Department.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G), Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.5.1.1	Identify two opportunities, per service type, for private pay services or government funded and explore the viability of pursuing those services, including financial analysis.	Clinical Program Plan (G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.5.1.2	Identify two opportunities to provide consulting services or administrative support services to other nonprofits, including financial analysis (e.g., training, group home maintenance, fiscal recordkeeping).	Finance MGT Plan (OH, G), HR Plan (OH, G), Facilities Plan (OH, G)	June 23
2.5.2.1	Consult financial experts with knowledge of non-profit finance management, third party billing, and revenue generation.	Program Plan: OHC (OH), Finance MGT Plan (OH, G)	June 23
2.5.2.2	Through business planning, evaluate the possibilities of new billable revenue opportunities (i.e.: Outpatient Clinic in Hartford, Addiction Services in Middletown, etc.).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Finance MGT Plan (OH, G)	June 23
2.5.2.3	Provide financial analysis on identified new revenue opportunities.	Finance MGT Plan (OH, G)	June 23
2.5.3.2	Perform lost revenue analysis on all programming/services currently being provided to help identify reasons or roadblocks to achieve maximum billing. Monitor and take action on productivity percentages vs. established benchmarks and budgets.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
3.1.2.4	Develop a working budget, in coordination with relevant parties, to monitor internal and external costs related to brand development (e.g., consultants, third parties, personnel time, etc.).	Finance MGT Plan (OH, G)	June 23
3.2.2.3	Consider restructuring current responsibilities, or improve cross-training to enable staff to better support all departments.	Finance MGT Plan (OH, G)	June 23
3.5.2.3	Develop a format and methodology for reviewing publicly available financial data of prospective partners identified.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
3.5.2.4	Evaluate any and all financial impacts of existing and/or future affiliations such as cost saving opportunities, tax/audit, treasury, or credit implications and entity related government filings.	Finance MGT Plan (OH, G)	June 23
4.3.3.2	Provide cost analysis on enhanced wages/benefits to identify increased revenues needed organization-wide to support these enhancements. Continue to identify cost savings in other areas to help overcome economic barriers.	Finance MGT Plan (OH, G)	June 23
5.3.5.2	Actively participate in the grant seeking and development process.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
5.5.1.3	Provide cost analysis to identified events or recognition and identify special funding available to determine feasibility of purposed activities.	Finance MGT Plan (OH, G)	June 23
<b>Human Resources (OH)</b>			
1.2.3.4	Disseminate recruitment marketing materials to local colleges, universities, local and statewide organizations, town boards, advocacy, community recreation centers that have been identified as partners.	HR Plan (OH)	June 22
1.3.2.2	Develop and implement outcome goals, objectives, and measures for Oak Hill's administrative departments that demonstrate their contribution to the achievement of the organization's mission.	Quality Assurance Plan (OH), HR Plan (OH), Corporate Compliance Plan (G)	June 24
1.3.2.7	Use the performance evaluation tool to evaluate each departments performance as it relates to the organization's mission.	HR Plan (OH)	June 23
1.4.1.6	Explore the use of a committee that will come together and discuss recognized needs of the employees and explore training resources where we may assist. Consult and provide training or resources to the departments based on committee recommendations.	HR Plan (OH)	June 22
1.4.2.5	Provide a calendar of training offerings as part of the organization's professional development efforts to provide effective tools for our staff related to diversity, equity and inclusion.	Program Plan: OHCP (OH), HR Plan (OH), Executive Plan (OH)	June 22
1.4.5.5	Develop methods to increase staff knowledge and understanding of programmatic service offerings that are available throughout all 3 organizations.	HR Plan (OH, G)	June 23
1.4.5.6	Research grant opportunities to fund cultural competency initiative.	HR Plan (OH), Development Plan (OH)	June 22
1.5.2.3	Create a partnership between the HR Department and the Development Department to expand our recruitment footprint by creating, promoting, and disseminating recruitment marketing materials.	HR Plan (OH), HR Plan (G)	June 23
1.5.3.4	Develop standards and processes to ensure consistent internal messaging.	Program Plan: OHC (OH), HR Plan (OH)	June 22
2.3.3.1	Educate the organization's stakeholders about events and the need to evaluate their return on investment.	Development Plan (OH), HR Plan (OH), Information Technology (OH)	June 24
2.3.6.3	Develop list of ways by which internal stakeholders can contribute by highlighting events at the beginning of the year.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
2.3.6.4	Develop a training for all employees that highlights the history and role of philanthropy, cultivates positive engagement and nurtures a culture of thankfulness and recognition, beginning with New Employee Orientation.	Program Plan: OHCP (OH), Executive Plan (OH, G), Development (OH, G), HR Plan (OH, G)	June 23
2.4.1.1	Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.	Program Plan: OHCP (OH), Quality Assurance Plan (OH, G), HR Plan (OH)	June 23
2.4.2.2	Implement a training program, across all levels of the organization (NEO, Management Training & program staff meetings).	Finance MGT Plan (OH, G), HR (OH, G)	June 22
2.4.4.2	Shorten the investigation, decision-making, reporting and notification cycle to reduce time on administrative leave.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
2.4.4.3	Explore a Lean Process study to identify appropriate level of training.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 22
2.4.4.4	Implement training and recommendations from the Lean Process Study.	HR Plan (OH, G)	June 23
2.4.4.5	Create a metrics dashboard to measure cost related to HR functions such as workers comp and safety, labor/grievances, leave of absences, turnover. Report quarterly.	HR Plan (OH, G)	June 22
2.4.4.6	Implement a plan to improve the following areas; labor relations, safety, & employee engagement.	HR Plan (OH, G)	June 23
2.5.1.2	Identify two opportunities to provide consulting services or administrative support services to other nonprofits, including financial analysis (e.g., training, group home maintenance, fiscal recordkeeping).	Finance MGT Plan (OH, G), HR Plan (OH, G), Facilities Plan (OH, G)	June 23
3.1.2.1	Utilizing each brand's personality, purposes and points of difference, research and implement marketing plans, development plans and public relations campaigns to highlight brand and service offerings and impact.	Program Plan: OHC (OH), Executive Plan (OH), HR Plan (OH, G)	June 23
3.1.2.2	Utilizing each brand's personality, purposes and points of difference, advance advocacy efforts collectively and separately, as appropriate.	Program Plan: OHC (OH), HR Plan (OH), Executive Plan (OH)	June 23
3.1.2.3	Standardize the use of recruitment marketing materials and use them for recruitment fairs and hiring events.	HR Plan (OH, G)	June 22
3.2.2.1	Create an effective process for inter-organization transfer to provide additional opportunities for personal and professional staff development and advancement.	HR Plan (OH, G), Program Plan: OHC (OH)	June 22
3.2.2.4	Identify and integrate at least 3 key functions within each of the administrative departments.	HR Plan (OH, G), Executive Plan (OH)	June 22
3.2.3.1	Explore the integration of existing and new meetings and committees for programmatic, administrative, and training purposes, where appropriate.	Facilities Plan (G), HR Plan (OH, G), Executive Plan (OH)	June 24
3.2.3.3	Create a reporting tool that will document the areas of integration between/among departments.	HR Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
3.4.1.1	Implement at least one organization-wide event that allows staff from all programs to develop collaborative rapport.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
3.4.2.1	Identify the customs, beliefs, and values of each organization.	HR Plan (OH), Executive Plan (OH)	June 22
3.4.2.2	Integrate the concepts of justice, access and serving the whole person as part of each organization's core values.	HR Plan (G), Executive Plan (OH)	June 22
3.4.3.1	Implement internal survey and evaluation strategies with specific questions designed to assess the organizational culture as it relates to diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24
3.4.3.2	Develop and implement at least one event within the organization that is intentionally designed to celebrate the importance of diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24
3.4.3.3	Underscore the importance of a common culture of learning by offering internal and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Cultural Competency Plan (G)	June 24
3.4.3.4	Underscore the importance of a common culture of learning by offering internal training that can be accessed by employees of both organizations and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH)	June 24
3.5.1.1	Develop criteria and methodology to evaluate potential partners/affiliations/mergers for fiscal viability. Perform a SWOT analysis focused on financial performance of these potential providers.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
3.5.1.3	Develop process and methodology for annual implementation of ANCOR initiatives.	HR Plan (OH)	June 22
3.5.3.5	Evaluate corporate structure in order to facilitate affiliations that advance the organization's mission.	HR Plan (OH, G), Facilities Plan (OH), Executive Plan (OH)	June 23
3.5.3.6	Create a written plan resulting from the evaluation of a corporate structure in order to facilitate affiliations that advance the organization's mission.	HR Plan (OH)	June 23
4.1.1.1	Create and communicate organizational definition of diversity, equity, and inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G)	June 24
4.1.1.2	Create and communicate, internally and externally, a vision statement to promote a culture of inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (G)	June 24
4.1.2.1	Create a staff and a management training to strengthen a diversity, equity and inclusion focus that emphasizes anti-biased strategies across the organization.	HR Plan (OH, G), Executive Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
4.1.2.2	Utilize external training resources as needed to enhance supervisory skills that foster trust and belonging for all staff.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
4.1.2.5	Host at least one event that educates staff about others' cultures, with the potential for recurring future events.	HR Plan (OH)	June 23
4.1.3.1	Conduct yearly reviews of diversity of workforce compared to diversity of Connecticut and the relevant geographical area.	HR Plan (OH, G), Executive Plan (OH, G)	June 22
4.1.3.2	Conduct yearly reviews of diversity of population served compared to diversity of Connecticut or relevant geographical area.	Quality Assurance Plan (OH, G), Clinical Program Plan (G), HR Plan (OH), Executive Plan (OH)	June 23
4.1.3.3	Explore strategies that can be implemented during the training process that will promote employee retention.	HR Plan (OH), Executive Plan (OH)	June 23
4.1.3.4	Conduct quarterly reviews that demonstrate the diversity within the supervisory ranks.	HR Plan (OH, G)	June 23
4.2.1.3	Implement the cultural competency training through Professional Development.	HR Plan (OH)	June 22
4.2.1.6	Work with SERC to create EDI training programs for staff.	HR Plan (OH)	June 23
4.2.2.3	Implement the cultural competency training through Professional Development.	HR Plan (OH)	June 22
4.2.2.4	Work with SERC to create EDI training programs for staff.	HR Plan (OH)	June 23
4.3.1.1	Compare data within the population served against the population of Connecticut or other relevant geographic areas to identify barriers in delivering services to under-represented members of the community.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.2	Research national programs with a focus on underserved populations to identify and replicate innovative new solutions.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.3	Research and access various federal relief funds available to populations served.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.4	Identify two new ways to help current employees advance into management positions.	HR Plan (OH, G)	June 23
4.3.3.4	Research and document what three other organizations are doing in this area for employees and present this for consideration.	HR Plan (OH)	June 23
4.4.2.3	Hire a Communications Director to focus on internal communications and collaborate with Development Department on external communications, including an emphasis on inclusive communication.	Executive Plan (OH, G), Development Plan (G), HR Plan (OH)	June 24

#	Intervention	Operational Plan	Target Date
5.1.1.2	Simplify and streamline the job application process to improve the selection process of qualified candidates.	IT Plan (G), HR Plan (OH, G),	June 23
5.1.1.3	Review recruitment policies and implement strategies to expand pool of workers.	Program Plan: OHC (OH), HR Plan (OH)	June 23
5.1.1.6	Identify and utilize additional external recruitment sources to advertise.	HR Plan (OH, G)	June 22
5.1.1.7	Identify and build relationships with organizations that provide grants to agencies that are focusing on diversifying their organizations.	HR Plan (OH)	June 23
5.1.2.1	Explore other methods of attracting a broader pool of candidates.	Program Plan: OHC (OH), Cultural Competency Plan (OH, G), HR Plan (OH)	June 22
5.1.2.2	Focus on affinity organizations (e.g., Association of Black Accountants), and other partnerships and internships to expand our recruitment to better attract diverse candidates for professional positions.	Program Plan: OHC (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 22
5.1.2.3	Utilize creative and innovative avenues including digital tools and social media, to expand the advertisement of job opportunities.	Program Plan: OHC (OH), HR Plan (OH, G)	June 24
5.1.2.5	Establish quarterly review of demographic data in each department to determine where targeted efforts should be used to increase diversity.	HR Plan (OH), Cultural Competency Plan (OH)	June 22
5.1.3.1	Review and enhance competency-based recruitment strategies.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 23
5.1.3.2	Create work-life balance initiatives.	HR Plan (OH, G) Cultural Competency Plan (OH), Program Plan: OHCP (OH)	June 23
5.1.3.5	Establish career paths for direct support employees.	Program Plan: OHCP (OH), HR Plan (OH)	June 24
5.1.4.2	Revise existing job descriptions, on an annual basis and when needed, to reflect the evolution of the changing times and service trends.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
5.1.4.3	Create a check in experience with new employees as a part of the onboarding process.	HR Plan (OH)	June 22
5.2.1.5	Use results from analysis 5.2.1 to inform the New Employee Orientation (NEO) experience.	HR Plan (OH)	June 23
5.3.1.3	Create a form that captures the needs assessment information that is collected during supervisory meetings.	HR Plan (OH, G)	June 23
5.3.2.5	Identify how other companies capture and disseminate organizational knowledge.	HR Plan (OH, G)	June 24
5.3.2.6	Cross train staff so that knowledge is not lost.	HR Plan (OH, G)	June 24
5.3.4.5	Explore the creation and establishment of Oak Hill University.	HR Plan (OH)	June 24
5.3.5.1	Establish external partnerships with colleges and universities.	HR Plan (OH, G)	June 24

#	Intervention	Operational Plan	Target Date
5.3.5.4	Identify groups who are committed to our mission and establish partnerships with them.	HR Plan (OH)	June 23
5.4.3.4	Research and re-establish a mentorship program with clear structure, concise learning objectives and encouragement to build strong working relationships.	HR Plan (OH)	June 23
5.4.4.2	Create a system to identify and develop internal employees for succession opportunities while also identifying external candidates with potential for advancement.	HR Plan (OH)	June 23
5.4.4.3	Review the details of the existing succession plan with the CEO and Executive Team for regular feedback and enhancements.	HR Plan (OH)	June 23
5.5.1.1	Establish staff appreciation events to celebrate the achievements of all staff and recognize outstanding achievements.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
5.5.2.1	Provide occasional personal, handwritten notes from the CEO recognizing a frontline employee's work and accomplishments.	Program Plan: OHC (OH), Executive Plan (OH) HR Plan (OH)	June 22
5.5.3.1	Develop strategies/programs for tying compensation to a review process that rates performance and experience, while also identifying areas for growth and future goals.	Executive Plan (OH), HR Plan (OH, G), Development Plan (G)	June 23
<b>Human Resources (G)</b>			
1.2.3.2	Identify local colleges and universities with human services or other relevant programs.	HR Plan (G)	June 22
1.3.2.1	Implement outcome measures at the Gilead Farrell Treatment Center's Residential, IOP, and Outpatient programs and include specific outcomes for substance treatments.	Quality Assurance Plan (G), HR Plan (G), Corporate Compliance Plan (G)	June 24
1.4.5.5	Develop methods to increase staff knowledge and understanding of programmatic service offerings that are available throughout all 3 organizations.	HR Plan (OH, G)	June 23
1.5.2.2	Develop marketing plan that will appropriately communicate to all stakeholders what we do and the scope of the program.	Program Plan: OHC (OH), Program Plan: OHS (OH), Clinical Program Plan (G), HR Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 24
1.5.2.3	Create a partnership between the HR Department and the Development Department to expand our recruitment footprint by creating, promoting, and disseminating recruitment marketing materials.	HR Plan (OH), HR Plan (G)	June 23
2.3.6.3	Develop list of ways by which internal stakeholders can contribute by highlighting events at the beginning of the year.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
2.3.6.4	Develop a training for all employees that highlights the history and role of philanthropy, cultivates positive engagement and nurtures a culture of thankfulness and recognition, beginning with New Employee Orientation.	Program Plan: OHCP (OH), Executive Plan (OH, G), Development (OH, G), HR Plan (OH, G)	June 23



#	Intervention	Operational Plan	Target Date
2.4.2.2	Implement a training program, across all levels of the organization (NEO, Management Training & program staff meetings).	Finance MGT Plan (OH, G), HR Plan (OH, G)	June 22
2.4.4.2	Shorten the investigation, decision-making, reporting and notification cycle to reduce time on administrative leave.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
2.4.4.3	Explore a Lean Process study to identify appropriate level of training.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 22
2.4.4.4	Implement training and recommendations from the Lean Process Study.	HR Plan (OH, G)	June 23
2.4.4.5	Create a metrics dashboard to measure cost related to HR functions such as workers comp and safety, labor/grievances, leave of absences, turnover. Report quarterly.	HR Plan (OH, G)	June 22
2.4.4.6	Implement a plan to improve the following areas; labor relations, safety, & employee engagement.	HR Plan (OH, G)	June 23
2.5.1.2	Identify two opportunities to provide consulting services or administrative support services to other nonprofits, including financial analysis (e.g., training, group home maintenance, fiscal recordkeeping).	Finance MGT Plan (OH, G), HR Plan (OH, G), Facilities Plan (OH, G)	June 23
3.1.2.1	Utilizing each brand's personality, purposes and points of difference, research and implement marketing plans, development plans and public relations campaigns to highlight brand and service offerings and impact.	Program Plan: OHC (OH), Executive Plan (OH), HR Plan (OH, G)	June 23
3.1.2.3	Standardize the use of recruitment marketing materials and use them for recruitment fairs and hiring events.	HR Plan (OH, G)	June 22
3.2.2.1	Create an effective process for inter-organization transfer to provide additional opportunities for personal and professional staff development and advancement.	HR Plan (OH, G), Program Plan: OHC (OH)	June 22
3.2.2.4	Identify and integrate at least 3 key functions within each of the administrative departments.	HR Plan (OH, G), Executive Plan (OH)	June 22
3.2.3.1	Explore the integration of existing and new meetings and committees for programmatic, administrative, and training purposes, where appropriate.	Facilities Plan (G), HR Plan (OH, G), Executive Plan (OH)	June 24
3.2.3.3	Create a reporting tool that will document the areas of integration between/among departments.	HR Plan (OH, G)	June 23
3.4.1.1	Implement at least one organization-wide event that allows staff from all programs to develop collaborative rapport.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
3.4.3.1	Implement internal survey and evaluation strategies with specific questions designed to assess the organizational culture as it relates to diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24
3.4.3.2	Develop and implement at least one event within the organization that is intentionally designed to celebrate the importance of diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24

#	Intervention	Operational Plan	Target Date
3.4.3.3	Underscore the importance of a common culture of learning by offering internal and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Cultural Competency Plan (G)	June 24
3.5.3.5	Evaluate corporate structure in order to facilitate affiliations that advance the organization's mission.	HR Plan (OH, G), Facilities Plan (OH), Executive Plan (OH)	June 23
4.1.1.1	Create and communicate organizational definition of diversity, equity, and inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G)	June 24
4.1.1.2	Create and communicate, internally and externally, a vision statement to promote a culture of inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (G)	June 24
4.1.2.1	Create a staff and a management training to strengthen a diversity, equity and inclusion focus that emphasizes anti-biased strategies across the organization.	HR Plan (OH, G), Executive Plan (OH, G)	June 23
4.1.2.2	Utilize external training resources as needed to enhance supervisory skills that foster trust and belonging for all staff.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
4.1.3.1	Conduct yearly reviews of diversity of workforce compared to diversity of Connecticut and the relevant geographical area.	HR Plan (OH, G), Executive Plan (OH, G)	June 22
4.1.3.4	Conduct quarterly reviews that demonstrate the diversity within the supervisory ranks.	HR Plan (OH, G)	June 23
4.3.1.4	Identify two new ways to help current employees advance into management positions.	HR Plan (OH, G)	June 23
5.1.1.2	Simplify and streamline the job application process to improve the selection process of qualified candidates.	IT Plan (G), HR Plan (OH, G),	June 23
5.1.1.6	Identify and utilize additional external recruitment sources to advertise.	HR Plan (OH, G)	June 22
5.1.2.2	Focus on affinity organizations (e.g., Association of Black Accountants), and other partnerships and internships to expand our recruitment to better attract diverse candidates for professional positions.	Program Plan: OHC (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 22
5.1.2.3	Utilize creative and innovative avenues including digital tools and social media, to expand the advertisement of job opportunities.	Program Plan: OHC (OH), HR Plan (OH, G)	June 24
5.1.3.1	Review and enhance competency-based recruitment strategies.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
5.1.3.2	Create work-life balance initiatives.	HR Plan (OH, G) Cultural Competency Plan (OH), Program Plan: OHCP (OH)	June 23
5.1.4.2	Revise existing job descriptions, on an annual basis and when needed, to reflect the evolution of the changing times and service trends.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
5.2.2.3	Develop an onboarding checklist to engage staff throughout the year and provide necessary training.	HR Plan (G)	June 23
5.2.3.3	Identify areas where onboarding and training processes differ and identify changes for integration and collaboration.	HR Plan (G)	June 23
5.3.1.3	Create a form that captures the needs assessment information that is collected during supervisory meetings.	HR Plan (OH, G)	June 23
5.3.2.5	Identify how other companies capture and disseminate organizational knowledge.	HR Plan (OH, G)	June 24
5.3.2.6	Cross train staff so that knowledge is not lost.	HR Plan (OH, G)	June 24
5.3.4.1	Create internal program for staff to advance into a higher-level position while obtaining the necessary degree/credential.	HR Plan (G)	June 23
5.3.5.1	Establish external partnerships with colleges and universities.	HR Plan (OH, G)	June 24
5.4.1.4	Conduct regular exit interviews with staff.	Program Plan: OHCP (OH), HR Plan (G)	June 23
5.4.2.1	Examine the organizational structure to identify opportunities for advancement.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (G)	June 23
5.4.2.2	Communicate accessible avenues of advancement opportunities to staff.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (G)	June 24
5.5.1.1	Establish staff appreciation events to celebrate the achievements of all staff and recognize outstanding achievements.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
5.5.2.2	Recognize "mission moments" in the newsletter.	HR Plan (G)	June 23
5.5.3.1	Develop strategies/programs for tying compensation to a review process that rates performance and experience, while also identifying areas for growth and future goals.	Executive Plan (OH), HR Plan (OH, G), Development Plan (G)	June 23
<b>Information Technology (OH)</b>			
2.3.3.1	Educate the organization's stakeholders about events and the need to evaluate their return on investment.	Development Plan (OH), HR Plan (OH), Information Technology (OH)	June 24

#	Intervention	Operational Plan	Target Date
3.2.1.3	Continue regular meetings between Gilead and Oak Hill. Consider merging processes where there is overlap and alignment.	IT Plan (OH)	June 24
3.2.3.2	Implement technological tools and systems across all three organizations to improve collaboration and improve efficiencies.	IT Plan (OH), Executive Plan (OH), Facilities Plan (OH, G)	June 24
4.4.1.5	Conduct periodic assessment of communications tools and platforms available. Review with business units and implement solutions as prudent.	IT Plan (OH)	June 24
5.1.1.5	Create technical-skill tests that are on par with job requirements for prospective employees to complete during the recruiting process.	IT Plan (OH)	June 22
5.2.1.2	Collaborate with the business units to automate and streamline the recruiting processes where logical.	IT Plan (OH)	June 24
5.2.1.3	Assist with the creation of onboarding training materials pertaining to necessary skills and knowledge to perform job functions.	IT Plan (OH)	June 23
5.2.3.2	Collaborate with the business units to automate and streamline the on/off-boarding processes where logical.	IT Plan (OH)	June 24
5.3.2.2	Periodically assess tools/platforms available and update to accurately reflect best practices and business requirements.	IT Plan (OH)	June 24
5.4.1.2	Develop reporting automation based on source systems, amending as required by the business to provide business units the data needed to make thoughtful decisions.	IT Plan (OH)	June 24
<b>Information Technology (G)</b>			
1.1.1.1	Identify at least one community or government produced needs assessment to inform program development or expansion needs across all service types including Outpatient, Residential, Education and other Community Programs.	Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), IT Plan (G)	June 23
1.1.1.4	Provide requested data for business units based on available census data, social media data, and advertising analytics for the areas that we serve in order to facilitate data-driven decision making.	IT Plan (G)	June 23
1.1.1.6	Work with the state and towns we service to understand key initiatives and opportunities our organizations could address.	IT Plan (G)	June 22
3.2.1.2	Clearly define the end goal of business operations to determine gaps in administrative functions.	IT Plan (G)	June 22
3.2.3.4	Develop integration plans based on integration initiative goals and long-term future intentions.	IT Plan (G), Development Plan (OH, G)	June 23
4.4.1.2	Explicitly define the goals of an inclusive communication strategy with specific and actionable language.	IT Plan (G)	June 22
5.1.1.2	Simplify and streamline the job application process to improve the selection process of qualified candidates.	IT Plan (G), HR Plan (OH, G),	June 23
5.1.1.4	Identify existing weaknesses in training and resources that directly support the hiring of employees to develop a plan of action for the recruitment team and hiring managers.	IT Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
5.2.1.1	Identify skills and peripheral information needed within each position and department to build categories or training initiatives which can then be built off of.	IT Plan (G)	June 23
5.2.3.1	Develop small committee to continually evaluate and adjust the onboarding initiatives among the agencies.	IT Plan (G)	June 22
5.3.2.1	Create a consistently updated Intranet resource that disseminates institutional knowledge, best practices, internal training initiatives and 3rd party training resources.	IT Plan (G)	June 24
5.4.1.1	Utilize system of record reports and internal QA surveys to analyze employee data and understand trends for a given time period.	IT Plan (G), Quality Assurance Plan (OH, G)	June 24
<b>Program Plan: OHC (OH)</b>			
1.1.2.1	Develop and implement internal surveys designed to assess existing unmet needs among persons served (including all referrals). Ensure that the surveys themselves are accessible for people with disabilities.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.2.3.1	Assess and implement programmatic volunteer opportunities that exist within current service models.	Program Plan: OHC (OH)	June 23
1.3.3.2	Incorporate review of measures into department and supervisory meetings.	Program Plan I (OH)	June 23
1.4.1.2	Invite other departments to participate in regular department meetings.	Program Plan: OHC (OH), Program Plan: OHCP (OH)	June 23
1.4.3.1	Assess and identify opportunities for new service with scalability.	Program Plan: OHC (OH), Program Plan: OHCP (OH)	June 24
1.4.4.1	Generate and devise collaborative program expansion through Senior Program Leadership meetings.	Program Plan: OHC (OH)	June 24
1.5.2.1	Develop standards to ensure consistent external messaging.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 22
1.5.2.2	Develop marketing plan that will appropriately communicate to all stakeholders what we do and the scope of the program.	Program Plan: OHC (OH), Program Plan: OHS (OH), Clinical Program Plan (G), HR Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 24
1.5.3.2	Identify programming across all three organizations in which a standardized referral and intake process could create synergies to improve program access and clarify outreach efforts.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH)	June 24
1.5.3.4	Develop standards and processes to ensure consistent internal messaging.	Program Plan: OHC (OH), HR Plan (OH)	June 22
1.6.3.1	Incorporate advocacy opportunities through in-person, electronic and print communications.	Program Plan: OHC (OH)	June 23

#	Intervention	Operational Plan	Target Date
2.1.2.1	Utilize the annual budget process to help identify other funding mechanisms.	Program Plan: OHC (OH), Clinical Program Plan (G)	June 22
2.1.3.1	Convene key program staff to complete business planning.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.2.1.1	Based on market need and funding opportunities, business planning will be conducted to determine fiscal viability of new services and the presence of any gap in services. (e.g., New Haven, Bridgeport, New London).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
2.2.3.1	Determine key performance indicators for each service type which will allow us to analyze mission and impact.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 22
2.4.3.1	Determine financial key performance indicators (KPI) by service type.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.3.2	Review KPIs monthly and provide actionable steps if needed to the Finance Department.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G), Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.2.3	Explore feasibility of partnering with a residential program to develop a high quality residential/educational program to meet identified referral needs.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
3.4.1.1	Implement at least one organization-wide event that allows staff from all programs to develop collaborative rapport.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
3.4.3.1	Implement internal survey and evaluation strategies with specific questions designed to assess the organizational culture as it relates to diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24

#	Intervention	Operational Plan	Target Date
3.4.3.2	Develop and implement at least one event within the organization that is intentionally designed to celebrate the importance of diversity, equity, and inclusion.	HR Plan (OH, G), Program Plan: OHC (OH), Cultural Competency Plan (G)	June 24
3.4.3.3	Underscore the importance of a common culture of learning by offering internal and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Cultural Competency Plan (G)	June 24
4.1.1.1	Create and communicate organizational definition of diversity, equity, and inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G)	June 24
4.1.1.2	Create and communicate, internally and externally, a vision statement to promote a culture of inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (G)	June 24
4.1.2.2	Utilize external training resources as needed to enhance supervisory skills that foster trust and belonging for all staff.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
4.2.2.1	Provide disability awareness educational content regarding physical and digital accessibility.	Program Plan: OHC (OH)	June 23
4.2.3.2	Provide disability awareness educational content regarding physical and digital accessibility.	Program Plan: OHC (OH)	June 23
4.3.1.1	Compare data within the population served against the population of Connecticut or other relevant geographic areas to identify barriers in delivering services to under-represented members of the community.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.2	Research national programs with a focus on underserved populations to identify and replicate innovative new solutions.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.3	Research and access various federal relief funds available to populations served.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.2.1	Develop or expand existing services to provide targeted impact related to social determinants of health.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
4.3.2.2	Consider in-house resource center to refer and/or facilitate access to essential services (e.g., transportation, childcare, fitness, dental, mental and physical health).	Accessibility Plan (G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24

#	Intervention	Operational Plan	Target Date
4.3.3.1	Through the budget process, evaluate earned revenues including existing and projected.	Program Plan: OHC (OH)	June 23
4.4.1.4	Revise and create policies that will address the diverse communication needs of all stakeholders.	Program Plan: OHC (OH)	June 23
5.1.1.3	Review recruitment policies and implement strategies to expand pool of workers.	Program Plan: OHC (OH), HR Plan (OH)	June 23
5.1.2.1	Explore other methods of attracting a broader pool of candidates.	Program Plan: OHC (OH), Cultural Competency Plan (OH, G), HR Plan (OH)	June 22
5.1.2.2	Focus on affinity organizations (e.g., Association of Black Accountants), and other partnerships and internships to expand our recruitment to better attract diverse candidates for professional positions.	Program Plan: OHC (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 22
5.1.2.3	Utilize creative and innovative avenues including digital tools and social media, to expand the advertisement of job opportunities.	Program Plan: OHC (OH), HR Plan (OH, G)	June 24
5.1.3.1	Review and enhance competency-based recruitment strategies.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 23
5.1.4.2	Revise existing job descriptions, on an annual basis and when needed, to reflect the evolution of the changing times and service trends.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
5.2.1.4	Integrate existing onboarding strategies with individualized department needs in a structured approach.	Program Plan: OHC (OH)	June 24
5.3.1.2	Develop a training assessment tool specific to our program offerings.	Program Plan: OHC (OH)	June 24
5.3.3.1	Regularly engage with staff to mentor and educate through on-the-job training.	Program Plan: OHC (OH)	June 24
5.4.2.1	Examine the organizational structure to identify opportunities for advancement.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (G)	June 23
5.4.2.2	Communicate accessible avenues of advancement opportunities to staff.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (G)	June 24
5.5.1.1	Establish staff appreciation events to celebrate the achievements of all staff and recognize outstanding achievements.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
5.5.2.1	Provide occasional personal, handwritten notes from the CEO recognizing a frontline employee's work and accomplishments.	Program Plan: OHC (OH), Executive Plan (OH) HR Plan (OH)	June 22



#	Intervention	Operational Plan	Target Date
<b>Program Plan: OHS (OH)</b>			
1.1.1.1	Identify at least one community or government produced needs assessment to inform program development or expansion needs across all service types including Outpatient, Residential, Education and other Community Programs.	Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), IT Plan (G)	June 23
1.1.1.2	Explore feasibility to open classrooms in New Haven, Bridgeport, and New London areas to fill regional presence gaps.	Program Plan: OHS (OH)	June 23
1.1.1.3	Explore the feasibility of providing transportation for students who attend OHS.	Program Plan: OHS (OH)	June 24
1.1.2.2	Assess needs of target populations that are not currently being served by any of our three organizations.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.4	Design and implement new programming and services to provide appropriate support for those unmet needs.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
1.1.2.5	Explore the feasibility of an extended day program for students that do not attend Oak Hill Schools and an inclusive Pre-K daycare program that is aligned with our mission, philosophies, and CT Early Learning and Development standards.	Program Plan: OHS (OH)	June 24
1.1.2.6	Explore the feasibility of developing a consulting service, in which Oak Hill's Education Department would support the district's capacity to provide high quality programming for each student.	Program Plan: OHS (OH)	June 24
1.1.3.1	Develop a strong understanding of what services are already offered by other organizations in the community to address existing needs and create strong collaborative partnerships to enhance and strengthen these services.	Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
1.3.2.6	Develop curriculum system rooted in Oak Hill School philosophies and educational methodology, CCSS, and CSDE regulations and licensure requirements.	Program Plan: OHS (OH)	June 24
1.4.1.1	Actively seek partnerships and collaborations related to existing art programs.	Program Plan: OHS (OH)	June 23
1.4.2.2	Actively seek relationships with new school districts and educational organizations/agencies.	Program Plan: OHS (OH)	June 24
1.5.2.2	Develop marketing plan that will appropriately communicate to all stakeholders what we do and the scope of the program.	Program Plan: OHC (OH), Program Plan: OHS (OH), Clinical Program Plan (G), HR Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 24
2.1.4.2	Continually review staffing needs and effectiveness for optimal service delivery and fiscal viability.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 23

#	Intervention	Operational Plan	Target Date
2.2.1.1	Based on market need and funding opportunities, business planning will be conducted to determine fiscal viability of new services and the presence of any gap in services. (e.g., New Haven, Bridgeport, New London).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
2.2.3.1	Determine key performance indicators for each service type which will allow us to analyze mission and impact.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 22
2.4.3.1	Determine financial key performance indicators (KPI) by service type.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.3.2	Review KPIs monthly and provide actionable steps if needed to the Finance Department.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G), Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.5.1.1	Identify two opportunities, per service type, for private pay services or government funded and explore the viability of pursuing those services, including financial analysis.	Clinical Program Plan (G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.5.2.2	Through business planning, evaluate the possibilities of new billable revenue opportunities (i.e.: Outpatient Clinic in Hartford, Addiction Services in Middletown, etc.).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Finance MGT Plan (OH, G)	June 23
2.5.3.1	Through business planning, identify where marketing resources could help maximize revenue.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
3.3.2.1	Explore opportunities to create new programs that integrate the services and resources of the affiliated organizations.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Executive Plan (OH)	June 24
4.1.1.1	Create and communicate organizational definition of diversity, equity, and inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G)	June 24
4.1.1.2	Create and communicate, internally and externally, a vision statement to promote a culture of inclusion.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (G)	June 24
4.1.2.2	Utilize external training resources as needed to enhance supervisory skills that foster trust and belonging for all staff.	Program Plan: OHC (OH), Program Plan: OHS (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
4.1.2.3	Develop and implement professional learning on key principles of equity and social justice that will align with the organization's vision and mission for development and growth.	Program Plan: OHS (OH)	June 24
5.1.1.5	Review staffing needs and effectiveness before each classroom/program opens.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
5.1.4.1	Evaluate each job responsibility and create a productive and effective system based on accountability. Adjust job descriptions to ensure they accurately reflect the needs of the department.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 23
5.2.2.2	Develop and implement a comprehensive onboarding process for all staff.	Program Plan: OHS (OH)	June 23
5.2.2.4	Maintain and expand Professional Development based on staff needs and interests. Develop new teacher orientation training.	Program Plan: OHS (OH)	June 24
5.4.1.3	Continue to analyze and encourage Lean processes to improve productivity and ensure that quality services are provided.	Program Plan: OHS (OH)	June 24
5.4.2.3	Maintain and expand systems to encourage leadership at all staff levels.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
<b>Program Plan: OHCP (OH)</b>			
1.1.1.1	Identify at least one community or government produced needs assessment to inform program development or expansion needs across all service types including Outpatient, Residential, Education and other Community Programs.	Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), IT Plan (G)	June 23

#	Intervention	Operational Plan	Target Date
1.1.2.1	Develop and implement internal surveys designed to assess existing unmet needs among persons served (including all referrals). Ensure that the surveys themselves are accessible for people with disabilities.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.2	Assess needs of target populations that are not currently being served by any of our three organizations.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.3	Identify potential barriers, including physical ability, race, culture and digital accessibility (website, social media, etc..) that might prevent access to services.	Accessibility Plan (OH, G), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.4	Design and implement new programming and services to provide appropriate support for those unmet needs.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
1.1.3.4	Identify key community stakeholders who may be missing from existing collaborations and create innovative strategies for greater inclusion.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.2.1.2	Establish educational programs and support groups to meet the needs of the people we serve.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.2.1.4	Develop a workgroup consisting of multiple departments at all levels of the organization and constituents to participate in planning and implementation of strategies to expand relationships within communities where we currently provide services.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.2.2.1	Partner with the CT Nonprofit Alliance to regularly engage board members and family members for advocacy purposes.	Program Plan: OHCP (OH), Facilities Plan (OH)	June 23
1.3.1.1	Identify the ideal staffing ratios within programs, create a method to monitor, and implement monitoring strategies.	Program Plan: OHCP (OH), Quality Assurance Plan (OH, G)	June 23
1.3.1.2	Implement a budgeting process to compare historical staffing ratios to current needs and funding levels.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 22
1.3.1.3	Expand and adapt the emergency staffing plan developed during the COVID-19 pandemic to address specific program challenges.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 22
1.4.1.2	Invite other departments to participate in regular department meetings.	Program Plan: OHC (OH), Program Plan: OHCP (OH)	June 23
1.4.2.5	Provide a calendar of training offerings as part of the organization's professional development efforts to provide effective tools for our staff related to diversity, equity and inclusion.	Program Plan: OHCP (OH), HR Plan (OH), Executive Plan (OH)	June 22
1.4.3.1	Assess and identify opportunities for new service with scalability.	Program Plan: OHC (OH), Program Plan: OHCP (OH)	June 24

#	Intervention	Operational Plan	Target Date
1.4.3.5	Develop one viable business plan for one new private pay service.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.1.1.1	Hold team/ department meetings to identify unpaid services and research other funding mechanisms (e.g., Grants, Contracts, Fundraising, etc..) to help pay for these needed services. Additional discussions around rate settings can also be held.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.1.3.1	Convene key program staff to complete business planning.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.1.4.2	Continually review staffing needs and effectiveness for optimal service delivery and fiscal viability.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 23
2.1.4.3	Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 24
2.2.1.1	Based on market need and funding opportunities, business planning will be conducted to determine fiscal viability of new services and the presence of any gap in services. (e.g., New Haven, Bridgeport, New London).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
2.2.3.1	Determine key performance indicators for each service type which will allow us to analyze mission and impact.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 22
2.2.3.2	Determine key performance indicators for each service type which will allow us to analyze profitability and return on investment.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.2.4.2	Participate in a multi-department business planning process by applying analytical financial research and studies to provide financial data to assist the decision-making process.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.3.4.1	Evaluate the current grant structure and resources to determine whether changes need to made to meet the demands of the entire organization.	Program Plan: OHCP (OH), Development Plan (OH, G)	June 24
2.3.6.3	Develop list of ways by which internal stakeholders can contribute by highlighting events at the beginning of the year.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
2.3.6.4	Develop a training for all employees that highlights the history and role of philanthropy, cultivates positive engagement and nurtures a culture of thankfulness and recognition, beginning with New Employee Orientation.	Program Plan: OHCP (OH), Executive Plan (OH, G), Development (OH, G), HR Plan (OH, G)	June 23
2.4.1.1	Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.	Program Plan: OHCP (OH), Quality Assurance Plan (OH, G), HR Plan (OH)	June 23
2.4.1.3	Identify billing areas to monitor for lost revenue opportunities (e.g., day service authorizations vs. actual billed services).	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 22

#	Intervention	Operational Plan	Target Date
2.4.3.1	Determine financial key performance indicators (KPI) by service type.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.3.2	Review KPIs monthly and provide actionable steps if needed to the Finance Department.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G), Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.4.2	Shorten the investigation, decision-making, reporting and notification cycle to reduce time on administrative leave.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
2.4.4.3	Explore a Lean Process study to identify appropriate level of training.	Program Plan: OHCP (OH), HR Plan (OH, G)	June 22
2.5.1.1	Identify two opportunities, per service type, for private pay services or government funded and explore the viability of pursuing those services, including financial analysis.	Clinical Program Plan (G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.5.2.2	Through business planning, evaluate the possibilities of new billable revenue opportunities (i.e.: Outpatient Clinic in Hartford, Addiction Services in Middletown, etc.).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Finance MGT Plan (OH, G)	June 23
2.5.3.1	Through business planning, identify where marketing resources could help maximize revenue.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.5.3.2	Perform lost revenue analysis on all programing/services currently being provided to help identify reasons or roadblocks to achieve maximum billing. Monitor and take action on productivity percentages vs. established benchmarks and budgets.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
3.3.1.1	Develop a streamlined referral process across all three agencies, where possible.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.1.2	Evaluate where synergies may exist among current service offerings to ensure seamless service delivery between all programs, education, residential, Oak Hill Centers, and Gilead, as evidenced in inclusive services aligned with our mission.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.1.3	Assess opportunities for shared resources/staffing.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.2.1	Explore opportunities to create new programs that integrate the services and resources of the affiliated organizations.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Executive Plan (OH)	June 24
3.3.2.2	Provide thorough education about the organization's programs and services to upper and middle management.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Executive Plan (OH)	June 23
3.3.2.3	Explore feasibility of partnering with a residential program to develop a high quality residential/educational program to meet identified referral needs.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
3.3.2.4	Develop a collaborative programmatic team that includes "middle managers" from all 3 agencies.	Program Plan: OHCP (OH), Executive Plan (G)	June 23
3.3.3.1	Develop a project description and action plan for each of the project priorities that have been identified by the integrated Senior Program Leadership Team.	Program Plan: OHCP (OH), Executive Plan (OH, G)	June 22
3.3.3.2	Identify a project lead and targeted completion date for each of the identified priorities, in partnership with the Oak Hill and Gilead Executive Leadership Team.	Program Plan: OHCP (OH), Executive Plan (OH, G)	June 23
3.4.1.1	Implement at least one organization-wide event that allows staff from all programs to develop collaborative rapport.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
3.4.3.3	Underscore the importance of a common culture of learning by offering internal and external professional development learning opportunities, career ladder pathways, and lateral job possibilities.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Cultural Competency Plan (G)	June 24
4.1.1.3	Review and update language, including forms and documents, policy, treatment planning, etc., to reflect an open and affirming culture of inclusion.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
5.1.1.5	Review staffing needs and effectiveness before each classroom/program opens.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24

#	Intervention	Operational Plan	Target Date
5.1.3.1	Review and enhance competency-based recruitment strategies.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Cultural Competency Plan (OH, G)	June 23
5.1.3.2	Create work-life balance initiatives.	HR Plan (OH, G) Cultural Competency Plan (OH), Program Plan: OHCP (OH)	June 23
5.1.3.5	Establish career paths for direct support employees.	Program Plan: OHCP (OH), HR Plan (OH)	June 24
5.1.4.1	Evaluate each job responsibility and create a productive and effective system based on accountability. Adjust job descriptions to ensure they accurately reflect the needs of the department.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 23
5.1.4.2	Revise existing job descriptions, on an annual basis and when needed, to reflect the evolution of the changing times and service trends.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G)	June 23
5.3.5.2	Actively participate in the grant seeking and development process.	Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
5.4.1.4	Conduct regular exit interviews with staff.	Program Plan: OHCP (OH), HR Plan (G)	June 23
5.4.2.1	Examine the organizational structure to identify opportunities for advancement.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (G)	June 23
5.4.2.2	Communicate accessible avenues of advancement opportunities to staff.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (G)	June 24
5.4.2.3	Maintain and expand systems to encourage leadership at all staff levels.	Program Plan: OHS (OH), Program Plan: OHCP (OH)	June 24
5.5.1.1	Establish staff appreciation events to celebrate the achievements of all staff and recognize outstanding achievements.	Program Plan: OHC (OH), Program Plan: OHCP (OH), HR Plan (OH, G), Executive Plan (OH)	June 23
<b>Clinical Program (G)</b>			
1.1.1.1	Identify at least one community or government produced needs assessment to inform program development or expansion needs across all service types including Outpatient, Residential, Education and other Community Programs.	Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), IT Plan (G)	June 23



#	Intervention	Operational Plan	Target Date
1.1.2.1	Develop and implement internal surveys designed to assess existing unmet needs among persons served (including all referrals). Ensure that the surveys themselves are accessible for people with disabilities.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.2	Assess needs of target populations that are not currently being served by any of our three organizations.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.3	Identify potential barriers, including physical ability, race, culture and digital accessibility (website, social media, etc..) that might prevent access to services.	Accessibility Plan (OH, G), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.1.2.4	Design and implement new programming and services to provide appropriate support for those unmet needs.	Accessibility Plan (OH, G), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
1.1.3.1	Develop a strong understanding of what services are already offered by other organizations in the community to address existing needs and create strong collaborative partnerships to enhance and strengthen these services.	Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
1.1.3.2	Identify a list of currently operating private organization and governmental collaborations or workgroups (e.g., CCT, NB Recovers, Opiate Task Forces, etc..) in each geographic area or within each department and assign attendance by staff.	Clinical Program Plan (G)	June 22
1.1.3.3	Explore the creation of a working group of private organizations and government agencies to meet informally and periodically to facilitate the coordinated provision of services.	Clinical Program Plan (G)	June 23
1.1.3.4	Identify key community stakeholders who may be missing from existing collaborations and create innovative strategies for greater inclusion.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.2.1.1	Appoint one or more individuals to act as community outreach liaisons.	Clinical Program Plan (G), Development Plan (OH)	June 23
1.2.1.2	Establish educational programs and support groups to meet the needs of the people we serve.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.2.1.3	Develop at least 5 new strategic partnerships with for-profit or nonprofit businesses related to Gilead's Mental Health Resource Center.	Clinical Program Plan (G)	June 23
1.2.1.4	Develop a workgroup consisting of multiple departments at all levels of the organization and constituents to participate in planning and implementation of strategies to expand relationships within communities where we currently provide services.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.2.2.2	Proactively reach out to families with newly discovered needs to introduce the organization and its services.	Clinical Program Plan (G)	June 22
1.2.2.3	Develop strategies to address any existing and emerging barriers (including privacy law) that prevent family member involvement in advocacy and fundraising activities.	Clinical Program Plan (G)	June 22

#	Intervention	Operational Plan	Target Date
1.2.2.4	Explore strategies for enhancing the organization's relationship with NAMI through things such as family groups and advocacy.	Clinical Program Plan (G)	June 23
1.3.1.3	Expand and adapt the emergency staffing plan developed during the COVID-19 pandemic to address specific program challenges.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 22
1.3.1.4	Develop strategies and measurable targets to expand per diem staffing pool.	Clinical Program Plan (G)	June 22
1.4.1.4	Use virtual platforms to share individual program knowledge/expertise in planned offerings at some consistent frequency across OH/GCS/ES programs (should be fun and educational).	Clinical Program Plan (G)	June 24
1.4.1.5	Develop a platform to share articles/info available to all program staff.	Clinical Program Plan (G)	June 23
1.4.2.1	Identify, develop and promote resources for adults with co-occurring disabilities (e.g., mental health and developmental disabilities).	Accessibility Plan (OH, G), Clinical Program Plan (G), Executive Plan (OH)	June 24
1.4.2.4	Develop and implement a training and integration plan to increase knowledge and skills of staff regarding social determinants of health.	Clinical Program Plan (G)	June 22
1.4.3.4	Reevaluate barriers to implementing private pay in-home case management and recovery support services at Gilead and determine viability moving forward.	Clinical Program Plan (G)	June 22
1.4.3.5	Develop one viable business plan for one new private pay service.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
1.4.4.3	Develop a rough program expansion proposal for each Gilead Clinical Department to evaluate for viability.	Clinical Program Plan (G)	June 23
1.5.2.1	Develop standards to ensure consistent external messaging.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 22
1.5.2.2	Develop marketing plan that will appropriately communicate to all stakeholders what we do and the scope of the program.	Program Plan: OHC (OH), Program Plan: OHS (OH), Clinical Program Plan (G), HR Plan (G), Executive Plan (OH), Development Plan (OH, G)	June 24
1.5.3.1	Develop a mandatory training that ensures all employees understand the services that we offer and how they can be accessed.	Executive Plan (OH, G), Clinical Program Plan (G)	June 23
1.5.3.2	Identify programming across all three organizations in which a standardized referral and intake process could create synergies to improve program access and clarify outreach efforts.	Program Plan: OHC (OH), Clinical Program Plan (G), Executive Plan (OH)	June 24
1.5.3.3	Reach out to consumers and family members, especially younger parents, directly to share our service offerings and discuss their support needs.	Clinical Program Plan (G), Executive Plan (OH)	June 23
1.6.3.3	Partner with NAMI to offer parent support groups, to nurture relationship with NAMI, and to establish Gilead in Middletown as the regional chapter.	Clinical Program Plan (G)	June 24

#	Intervention	Operational Plan	Target Date
1.6.3.4	Develop a process, through our rehab centers, to engage and train families on consumer advocacy.	Clinical Program Plan (G)	June 23
1.6.5.2	Identify one additional specific population (e.g., racial, ethnic or other demographic group) based on need and develop a strategy to address their mental health needs.	Clinical Program Plan (G)	June 23
2.1.2.1	Utilize the annual budget process to help identify other funding mechanisms.	Program Plan: OHC (OH), Clinical Program Plan (G)	June 22
2.1.3.1	Convene key program staff to complete business planning.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.2.1.4	Identify 3 potential new programming ideas with non-DMHAS funding sources.	Clinical Program Plan (G)	June 24
2.4.3.1	Determine financial key performance indicators (KPI) by service type.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.3.2	Review KPIs monthly and provide actionable steps if needed to the Finance Department.	Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G), Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
2.5.1.1	Identify two opportunities, per service type, for private pay services or government funded and explore the viability of pursuing those services, including financial analysis.	Clinical Program Plan (G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Finance MGT Plan (OH, G)	June 23
2.5.2.2	Through business planning, evaluate the possibilities of new billable revenue opportunities (i.e.: Outpatient Clinic in Hartford, Addiction Services in Middletown, etc.).	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Finance MGT Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
2.5.3.1	Through business planning, identify where marketing resources could help maximize revenue.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.1.1	Develop a streamlined referral process across all three agencies, where possible.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.1.2	Evaluate where synergies may exist among current service offerings to ensure seamless service delivery between all programs, education, residential, Oak hill Centers, and Gilead, as evidenced in inclusive services aligned with our mission.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.1.3	Assess opportunities for shared resources/staffing.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.3.2.1	Explore opportunities to create new programs that integrate the services and resources of the affiliated organizations.	Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Executive Plan (OH)	June 24
3.3.2.2	Provide thorough education about the organizations' programs and services to upper and middle management.	Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G), Executive Plan (OH)	June 23
3.4.1.1	Implement at least one organization-wide event that allows staff from all programs to develop collaborative rapport.	HR Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 24
3.4.1.2	Develop a pilot meeting, like Gilead's clinical rounds, that includes members across all three organizations to address the people we serve's shared issues and needs.	Clinical Program Plan (G)	June 23
4.1.1.3	Review and update language, including forms and documents, policy, treatment planning, etc., to reflect an open and affirming culture of inclusion.	Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
4.1.2.4	Identify and integrate educational materials regarding DEI strategies.	Clinical Program Plan (G)	June 24
4.1.3.2	Conduct yearly reviews of diversity of population served compared to diversity of Connecticut or relevant geographical area.	Quality Assurance Plan (OH, G), Clinical Program Plan (G), HR Plan (OH), Executive Plan (OH)	June 23
4.2.1.2	Identify and review at least two sources of data (e.g., drug companies, Boston University, etc..).	Clinical Program Plan (G)	June 23
4.2.1.5	Create a simple one-page fact sheet to share with stakeholders and community members.	Clinical Program Plan (G)	June 24

#	Intervention	Operational Plan	Target Date
4.2.2.2	Develop a curriculum to address bias and stigma and train staff on how to implement curriculum.	Clinical Program Plan (G)	June 23
4.2.3.3	Facilitate an experiential training for the public at large to give stakeholders an experience of the stigma faced by those with mental health and addictions challenges (e.g., schizophrenia virtual reality experience).	Clinical Program Plan (G)	June 23
4.3.1.1	Compare data within the population served against the population of Connecticut or other relevant geographic areas to identify barriers in delivering services to under-represented members of the community.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.2	Research national programs with a focus on underserved populations to identify and replicate innovative new solutions.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.1.3	Research and access various federal relief funds available to populations served.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G), HR Plan (OH)	June 24
4.3.2.1	Develop or expand existing services to provide targeted impact related to social determinants of health.	Accessibility Plan (OH, G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
4.3.2.2	Consider in-house resource center to refer and/or facilitate access to essential services (e.g., transportation, childcare, fitness, dental, mental and physical health).	Accessibility Plan (G), Program Plan: OHC (OH), Clinical Program Plan (G)	June 24
5.1.1.1	Determine how we can approach the medical community and payor community to provide specific services. Create opportunities for meetings with the medical providers.	Clinical Program Plan (G)	June 23
<b>Public Policy and External Affairs (OH)</b>			
1.6.3.7	Offer 1-2 public policy training sessions per year and provide access to other training opportunities as available.	Executive Plan (OH), Public Policy Plan (OH)	June 22
<b>Quality Assurance (OH)</b>			
1.3.1.1	Identify the ideal staffing ratios within programs, create a method to monitor, and implement monitoring strategies.	Program Plan: OHCP (OH), Quality Assurance Plan (OH, G)	June 23
1.3.2.2	Develop and implement outcome goals, objectives, and measures for Oak Hill's administrative departments that demonstrate their contribution to the achievement of the organization's mission.	Quality Assurance Plan (OH), HR Plan (OH), Corporate Compliance Plan (G)	June 24
1.3.2.5	Create revisions and improvements in Oak Hill's policies, procedures, and processes to work towards conformance to CARF standards for possible future accreditation.	Quality Assurance Plan (OH)	June 24

#	Intervention	Operational Plan	Target Date
1.3.3.1	Regularly review and revise program and administrative outcome measures and provide consistent and clear reporting and improved feedback to relevant stakeholders on performance.	Quality Assurance Plan (OH, G)	June 24
1.5.1.1	Collaborate with Development and Program Departments to identify outreach and communication goals and methods to evaluate success towards those goals.	Quality Assurance Plan (OH, G)	June 23
2.1.4.1	Collaborate with other departments to provide billing audits or other applicable reporting to support fiscal evaluation efforts.	Quality Assurance Plan (OH, G)	June 23
2.4.1.1	Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.	Program Plan: OHCP (OH), Quality Assurance Plan (OH, G), HR Plan (OH)	June 23
2.4.1.2	Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.	Quality Assurance Plan (OH, G)	June 23
2.4.1.4	Identify areas to monitor for revenue gain opportunities (e.g., productivity percentages for billable employees).	Finance MGT Plan (OH, G), Quality Assurance Plan (OH, G)	June 22
2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G), Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.2.1.4	Evaluate departments with existing shared staffing between agencies, and further collaborate or integrate where appropriate to provide improved efficiencies and effectiveness.	Quality Assurance Plan (OH, G)	June 24
4.1.3.2	Conduct yearly reviews of diversity of population served compared to diversity of Connecticut or relevant geographical area.	Quality Assurance Plan (OH, G), Clinical Program Plan (G), HR Plan (OH), Executive Plan (OH)	June 23
4.3.2.4	Create, update, and implement outcome measures that demonstrate and reflect organizational performance and impact on the lives and social determinants of health of the individuals we serve.	Quality Assurance Plan (OH, G)	June 23
5.3.2.3	Support relevant Quality Assurance related training efforts of staff on documentation requirements identified in the needs assessment.	Quality Assurance Plan (OH, G)	June 24
5.4.1.1	Utilize system of record reports and internal QA surveys to analyze employee data and understand trends for a given time period.	IT Plan (G), Quality Assurance Plan (OH, G)	June 24
<b>Quality Assurance (G)</b>			
1.3.1.1	Identify the ideal staffing ratios within programs, create a method to monitor, and implement monitoring strategies.	Program Plan: OHCP (OH), Quality Assurance Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
1.3.2.1	Implement outcome measures at the Gilead Farrell Treatment Center's Residential, IOP, and Outpatient programs and include specific outcomes for substance treatments.	Quality Assurance Plan (G), HR Plan (G), Corporate Compliance Plan (G)	June 24
1.3.2.3	Develop and implement outcome goals, objectives, and measures for Gilead's Mental Health Resource Center.	Quality Assurance Plan (G)	June 22
1.3.2.4	Ensure Gilead maintains and improves its conformance to CARF standards and achieves full re-accreditation.	Quality Assurance Plan (G)	June 23
1.3.3.1	Regularly review and revise program and administrative outcome measures and provide consistent and clear reporting and improved feedback to relevant stakeholders on performance.	Quality Assurance Plan (OH, G)	June 24
1.5.1.1	Collaborate with Development and Program Departments to identify outreach and communication goals and methods to evaluate success towards those goals.	Quality Assurance Plan (OH, G)	June 23
2.1.4.1	Collaborate with other departments to provide billing audits or other applicable reporting to support fiscal evaluation efforts.	Quality Assurance Plan (OH, G)	June 23
2.4.1.1	Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.	Program Plan: OHCP (OH), Quality Assurance Plan (OH, G), HR Plan (OH)	June 23
2.4.1.2	Collaborate with the Training Department to facilitate and support training efforts of staff on documentation requirements necessary for billing.	Quality Assurance Plan (OH, G)	June 23
2.4.1.4	Identify areas to monitor for revenue gain opportunities (e.g., productivity percentages for billable employees).	Finance MGT Plan (OH, G), Quality Assurance Plan (OH, G)	June 22
2.4.4.1	Conduct regular billing audits for all applicable programs and services and provide reporting on these results to relevant staff. Review all audits and create an accountable corrective action.	Quality Assurance Plan (OH, G), Finance MGT Plan (OH, G), Program Plan: OHC (OH), Program Plan: OHS (OH), Program Plan: OHCP (OH), Clinical Program Plan (G)	June 23
3.2.1.4	Evaluate departments with existing shared staffing between agencies, and further collaborate or integrate where appropriate to provide improved efficiencies and effectiveness.	Quality Assurance Plan (OH, G)	June 24
4.1.3.2	Conduct yearly reviews of diversity of population served compared to diversity of Connecticut or relevant geographical area.	Quality Assurance Plan (OH, G), Clinical Program Plan (G), HR Plan (OH), Executive Plan (OH)	June 23
4.3.2.4	Create, update, and implement outcome measures that demonstrate and reflect organizational performance and impact on the lives and social determinants of health of the individuals we serve.	Quality Assurance Plan (OH, G)	June 23

#	Intervention	Operational Plan	Target Date
5.3.2.3	Support relevant Quality Assurance related training efforts of staff on documentation requirements identified in the needs assessment.	Quality Assurance Plan (OH, G)	June 24
5.4.1.1	Utilize system of record reports and internal QA surveys to analyze employee data and understand trends for a given time period.	IT Plan (G), Quality Assurance Plan (OH, G)	June 24
<b>Risk Management (OH)</b>			
2.1.2.2	Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
3.5.2.3	Develop a format and methodology for reviewing publicly available financial data of prospective partners identified.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
<b>Risk Management (G)</b>			
2.1.2.2	Review prior year actual financial results and key performance indicators with department heads to identify budget changes needed to address underfunded programs and alternative funding sources.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
3.5.2.3	Develop a format and methodology for reviewing publicly available financial data of prospective partners identified.	Finance MGT Plan (OH, G), Risk MGT Plan (OH, G)	June 23
<b>Strike Contingency (G)</b>			
5.4.1.5	Develop a process within HR to track and report on turnover and retention data.	Strike Contingency Plan (G)	June 23





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