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**Strategic Plan 2020**

Table of Contents

[Executive Summary 1](#_Toc18925357)

[2019 Highlights 1](#_Toc18925358)

[2020 Vision 1](#_Toc18925359)

[The Organization 2](#_Toc18925360)

[Our Mission 2](#_Toc18925361)

[Our Vision 2](#_Toc18925362)

[Our Values 2](#_Toc18925363)

[Organizational Description 4](#_Toc18925364)

[Operating Plan 2020 6](#_Toc18925365)

[Executive Team Projects 6](#_Toc18925366)

[Organizational Outcomes 7](#_Toc18925367)

[Service Lines - Projects and Outcomes 7](#_Toc18925368)

[Function Lines - Projects and Outcomes 11](#_Toc18925369)

[2020 Budget 14](#_Toc18925370)

[Implementation 16](#_Toc18925371)

[Reporting Plan 16](#_Toc18925372)

Executive Summary

The First Step House strategic plan is a living, dynamic document used to guide us toward our vision and determine whether we are on track to achieve the objectives we have set to help people build lives of meaning, purpose, and recovery. The Executive Management Team returns to it each month to evaluate outcomes, examine variances that may exist, and determine whether programmatic changes should be implemented. Essentially, the strategic plan is our roadmap, guiding us towards the goals we have established to ensure we are truly meeting the needs of our clients, their family members, funders, and community partners.

2019 Highlights

In 2019, First Step House began construction on the Central City Apartments. In December of 2017 First Step House was awarded $1.2 million in State and Federal Tax Credits to develop 75 units of permanent supportive housing for people with histories of homelessness and severe mental health conditions. This project is the result of a partnership with Salt Lake County Behavioral Health, Optum Healthcare, Housing Connect, and BlueLine Development. Together we worked to design the building that will feature apartments, clinic space, and supportive services. This project responds to the critical need in our community for housing and wrap-around services for highly vulnerable people.

In March of 2019, First Step House became the operator and service provider of Valor House, a 66-bed transitional housing facility located on the Veterans Affairs (VA) campus in Salt Lake City. To support the Veterans in these housing units, program staff utilize a variety of models including bridge housing, clinical treatment, and intensive wrap-around services to assist homeless Veterans to obtain employment, transition to permanent housing, and become self-sufficient.

2020 Vision

In Fiscal Year 2020, First Step House will break ground on the 426 Apartments, a new permanent supportive housing facility that will be located at 426 South 500 East in Salt Lake City, Utah. The 426 Apartments will house individuals, including Veterans, who are homeless and have disabilities; this includes, but is not limited to, individuals diagnosed with substance use disorders and mental health conditions. The people living at this location will be provided with supportive services necessary to manage their conditions, access services, and achieve long-term stability. This apartment complex will be composed of 40 one-bedroom units which will be set aside for people with incomes at or under 25% of the Area Median Income.

Over the course of 60 years, First Step House has transitioned from being a true half-way house to a licensed, credentialed, and soon-to-be accredited behavioral health treatment provider. We are now able to deliver effective residential substance use disorder treatment, outpatient treatment, robust case management services, medical care coordination, transitional housing, and, in 2020, permanent supportive housing. Ultimately, all our growth and achievements help us accomplish our mission—the core of who we are—to help people build lives of meaning, purpose, and recovery.

The Organization

Our Mission

We help people build lives of meaning, purpose, and recovery.

This statement underlies all we do at First Step House. We believe that an essential element in the recovery process is to help people find, or rediscover, a deep sense of meaning and purpose in their lives. This begins by showing compassion and respect for every client we serve. During the recovery process we work to provide the scaffolding our clients need to thrive. Examples of this include increasing people’s connection to support groups, providing individual and group therapy, helping clients find affordable housing, assisting with employment needs, addressing health concerns, and helping people who are involved in the criminal justice system. As the people we serve stabilize in their recovery, we encourage them to give back to the community. We work hard to provide recovery services for those with the greatest need and find a deep sense of purpose in this work.

Our Vision

Our goal is to serve 5,000 people per year by 2028 using the highest-quality, evidence-based, recovery-oriented services possible.

Our vision is guided by our desire to meet the needs of the people we serve in the most effective manner possible. This drives us to deliver client-centered care utilizing evidence-base interventions as well as developing housing capacity, delivering robust case management services, and providing long-term recovery care. We have evolved with the substance use disorder and behavioral health treatment fields, acquiring new knowledge and gaining a deeper understanding of the strategies and models that are effective at helping people address their behavioral health needs and become stable in their recovery. In recent years these changes have driven us to implement a recovery-oriented system of care that spans the continuum of care across pre-treatment, treatment entry, recovery initiation, housing, and long-term recovery management. This continuum is anchored in a chronic disease management approach. Because client care is so important to us, our vision is to touch as many lives as possible in our community using the highest quality services available. This is why we have set the goal of serving 5,000 people per year by the year 2028 with a range of services that include primary health, behavioral health, employment, and housing.

Our Values

The following core values are critical to the success of our organization and the accomplishment of our mission. These values are central to all that we do, regardless of any changes in what we do, or how we operate. These values create a culture that we can remain committed to and serve as guideposts that help us make decisions in an ever-changing world.

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| --- | --- |
| Integrity | We are committed to acting with honesty and integrity in all that we do and will apply the highest ethical standards to our practices, even if the consequences are undesirable or unprofitable. We recognize that integrity is the foundation upon which transformative relationships are built. For us, integrity includes acting in ways that are consistent with our principles, keeping our promises, and being trustworthy. Integrity also involves being straightforward, sincere, and willing to face reality. Our interactions with all segments of society must reflect the high standards we profess. Our clients are encouraged to develop personal integrity as a guide for building meaningful lives. |
| Transparency | We will act in a transparent manner whenever possible, as long as necessary confidentiality and privacy concerns are maintained. Transparency is a complementary value to integrity and includes being open with our practices, goals, and decisions. We actualize this value by having supervisors and leaders report to employees as much, if not more than, employees report to their supervisors. This is important in stimulating open dialogue and eliciting feedback at all levels of our organization, allowing for continual growth and improvement. We further practice this value by being open with our clients, their families, community partners, and other stakeholders. Transparency builds trust, allows for verification by all, and communicates our purpose with clarity. Transparency breaks down silos and creates space for an open exchange of ideas, which increases collaboration, cooperation, and problem solving. |
| Positive Proactivity | Positive proactivity is defined as self-initiated, action-oriented behavior that anticipates events and the needs of others in a positive, solution-focused manner. We seek to work with enthusiasm and positivity, always being mindful of the impact we are having on those around us. Positive proactivity includes working as teams to find solutions in anticipation of problems rather than merely reacting to problems after the fact. Being positive does not mean that we ignore difficult truths. It is important that we are willing to face reality, point out issues and concerns, and bring ideas to the table with passion. However, we do not remain fixated on problems. It is critical that we face our problems from a proactive, solution-oriented mindset rather than a negative, pessimistic mindset that keeps people stuck. We want to work with people who are primarily concerned with accomplishing our mission rather than worrying about receiving accolades. |
| Humility | Humility is essential to maintaining a culture that is flexible and responsive, allowing for continual growth, adaptation, and improvement. Remaining teachable is an aspect of humility that is necessary to accomplish our mission. We strive to constantly learn from others and from our own mistakes. Humility helps us see the impact we are having on others, look inside, and take responsibility for our wrongs, rather than blaming others or being hypersensitive to criticism. When we are humble, we have an accurate sense of both our strengths and weaknesses and can see things in the context of the larger whole. For us, humility is not weakness but true strength, allowing us to do what is right with quiet resolve. It allows us to have a clear understanding of our achievements and abilities rather than an overinflated sense of our importance. When we are humble, we are willing to take credit, but we do not need to take credit from others. Humility allows us to see the dignity and inherent worth in all people, rather than evaluating others as being above or below ourselves. |
| Accountability | We accept responsibility on both an individual and an organizational level for our decisions, policies, practices, and performance. We do this by being accountable for the impact we have on our team members, our clients, and our community partners. It is important that we develop consistent habits with rigorous discipline, so we can meet expectations and accomplish our mission. We hold ourselves accountable by having a clear vision and strategies to accomplish our vision that are well communicated. We set well defined goals, track progress, and work to solve variances during regular management and team meetings. We maintain a culture of accountability by following a disciplined process to hire for competence and cultural fit. Accountability includes awareness, admitting faults, and holding each other accountable so that growth can occur. We encourage accountability by creating an environment where mistakes can be admitted and analyzed in an open and safe manner. |
| Altruism | Altruism involves acting with unselfish regard toward others and promoting the welfare of others even when doing so poses a risk or cost to the self. Our mission is best served by those who hold the value of altruism. We desire to work for a cause that is greater than ourselves and help relieve suffering in the world. We place our unitive purpose above the individual desire for power, control, or self-aggrandizement. Altruism involves being alive to the needs and humanity in others, having genuine concern for others, having a heart for service, and being happy when others thrive. |
| Compassion | Compassion involves a deep awareness and concern for the suffering and distress of others accompanied by a desire to help alleviate that suffering. This value motivates us to help people build lives of meaning, purpose, and recovery. It aids us in our drive to recognize the impact we have on those around us. Compassion allows us to see others as people rather than objects and to respond to the needs, struggles, and challenges that others face. Compassion is related to caring, kindness, interdependence, and recognizing the intrinsic value in others. A compassionate attitude can greatly reduce the distress people feel in difficult situations, aids in creating interpersonal connections, and helps create a culture built upon service. |

Organizational Description

First Step House was founded in 1958 by members of Alcoholics Anonymous who wanted to help people who had been “brought to their knees” by alcoholism. We are an organization that is proud of both our history and our legacy of meeting the healthcare, housing, and employment needs of vulnerable people within our community. Today, First Step House is a co-occurring capable, behavioral health treatment provider with multiple locations in Salt Lake County. We have been a consistent leader in delivering evidence-based interventions and achieving positive outcomes for people who have chronic behavioral health conditions, substance use disorders, histories of homelessness, mental health conditions, criminal justice involvement, and primary health concerns. The scope of services we offer include substance use disorder and mental health assessments, residential and outpatient treatment, transitional housing, case management, employment support, medical services, dental services, long-term recovery management, and peer support services. Through our programs, we serve over 730 individuals per year and operate a number of facilities including (1) a 70-bed residential treatment center located at 440 South 500 East with 34 beds designated for Veterans, (2) a 76-bed residential treatment center located at 411 North Grant Street, (3) an outpatient facility located at 2200 South State Street that serves a daily census of 75 to 100 clients, (4) an outpatient facility located at 660 South 200 East dedicated to serving criminal justice involved people in our recidivism reduction program called REACH (Recovery, Engagement, Assessment, Career Development, and Housing), (5) a 72-bed transitional housing facility with on-site supportive services for Veterans located at 720 Valdez Drive, and (6) 3 additional recovery residences that provide housing for people who need a stable, affordable living environment while receiving outpatient treatment.



*First Step House residential facility located at 411 North Grant Street*

Case Management

Our comprehensive case management program works in collaboration with our clinical programs to help increase our capacity to address our clients’ diverse needs. Our case managers administer needs assessments to our clients and develop targeted, goal-driven case management plans. Our case managers are expertly trained to connect people with a wide range of resources. These include housing, financial resources, education services, career development, legal services, vocational training, employment, medical services, dental services, community support, and health insurance.

**Community and Stakeholder Services**

We constantly strive to be engaged with the communities in which we provide services and with those who have a stake in our mission. We understand that we are part of a larger recovery community and that working with community partners is vital to helping those we serve. This work takes many forms, including grant collaboration, serving on boards, service collaboration, serving on political and civic committees, and educating community members about the needs of the people we serve.

Donor Services

First Step House works with donors who wish to support our mission to help people build lives of meaning, purpose, and recovery. We do this by conducting outreach to the philanthropic community and seeking partnerships with individuals, organizations, businesses, and foundations with common interests, values, and missions. We work to communicate clearly about our programs, goals, and outcomes with all donors and we continually strive to be wise stewards of the resources we are provided to deliver services and achieve our mission. We also seek to support our donors’ missions in whatever way we can through collaboration, data collection and reporting, presentations, tours, and community engagement.

Employment Preparation and Placement Program

The Employment Preparation and Placement (EPP) program is a comprehensive employment program designed to provide a continuum of employment-related services based on the individual needs of the people being served. The program is based upon the evidence-based Individual Placement and Support (IPS) model of supportive employment. The goals of the program are to increase long-term employment outcomes and advance economic inclusion and financial stability for those who have serious substance use disorders and mental health conditions.

Family and Fatherhood Program

The First Step House Family and Fatherhood Program helps stabilize families by providing a range of treatment services to parents and spouses who are affected by substance use disorders. This program also supports fathers involved with the legal system and helps those seeking to reunite with their children become responsible, engaged parents. Participants in the program are offered substance use disorder treatment, individual counseling, group therapy, couples’ therapy, and parenting classes.

**Long Term Recovery Management**

Our Long-Term Recovery Management (LTRM) program addresses the reality that addiction tends to be chronic in nature, similar to diabetes, HIV, or heart disease. This program provides services that match people’s needs over the course of the recovery process, including weekly, monthly, quarterly, or yearly wellness checkups; clinical outreach programs; and assertive early intervention for criminal or substance-related relapses. We use assertive outreach protocols, recovery support groups, and individual case management services within LTRM programming.

Mental Health Court Housing at FSHR House

Our mental health housing program helps people in mental health court by providing stable housing that supports recovery. Through this program, we also provide general case management services, including medication distribution and monitoring, drug testing, housing oversight, and coordination of care with mental health court.

**Outpatient Treatment**

Our outpatient program allows us to serve those with substance use disorders who have completed residential treatment or people whose substance use disorders are stable enough that outpatient services are clinically warranted. Clients who receive services in our outpatient program typically receive between 5 to 20 hours of treatment per week. Outpatient services include a combination of group therapy, psychoeducation groups, individual therapy, and case management services.

**Peer Support Services Program**

The Peer Support Services Program provides peer-based supportive services, delivered by certified peer support specialists, to reduce barriers to substance use disorder recovery and increase recovery stability. Services include assisting clients with creating and implementing a Wellness and Recovery Action Plan (WRAP), life skills and community resource classes, housing support, employment support, recovery coaching, and assertive linkage with community-based recovery resources. Program services result in the development of pro-social relationships and activities, housing stability, increased access to community resources, enhanced life skills, improved employment, reduced drug and alcohol use, positive behavior changes, increased knowledge of and access to resources and benefits, and improved health and wellness.

**REACH Program**

The First Step House REACH program is defined by the acronym REACH, which stands for Recovery, Engagement, Assessment, Career Development, and Housing. The REACH program is a Pay-for-Success project, which means that payments are made based upon hitting pre-determined outcomes. This program was launched in July of 2017 and serves adult males coming out of jail who are high-risk, high-need offenders diagnosed with substance use disorders. The REACH program utilizes the best available evidence for what works to reduce recidivism. The program is built upon the risk-need-responsivity model, which means that the program focuses on serving those who are the most likely to recidivate and that treatment is based upon individually addressing the factors that have the greatest impact upon reducing recidivism.

**Recovery Residence**

First Step House provides affordable housing for clients who need a sober living environment that will support their recovery. We continually work to improve our facilities and develop new housing options. Housing is a critical component of long-term recovery and our data show that stable housing is related to successful treatment completion. The goal of our housing program is to help clients develop independent living skills and transition to permanent housing.

Residential Treatment at 411 North Grant Stree**t**

Our Grant street facility is a residential treatment program located in a renovated church in Salt Lake City, Utah. At this location we serve adult men, ages 18 years and older, who are diagnosed with substance use disorders. We specialize in helping people with co-occurring mental health disorders, those involved in the criminal justice system, people with low to no income, and those who have unstable or no housing. Our goal is to create a community that allows people to engage in treatment on multiple levels using individualized treatment planning and evidence-based therapy. Residential services include a combination of group therapy, psychoeducation groups, individual therapy, medication management, peer support, primary health, and case management services.

**Residential Treatment at 440 South 500 East**

Our facility at 440 South is a 70-bed residential treatment center that includes 34 beds designated for Veterans. At this location, our we offer Veteran-specific treatment services. We have a long history of helping Veterans recover from the negative effects of substance abuse. As with all our clinical services, our treatment begins with a comprehensive assessment that is used to determine the best course of treatment for each person. Our staff have experience working with Veterans and non-Veterans and understand the unique needs of each population. Residential services include a combination of group therapy, psychoeducation groups, individual therapy, medication management, peer support, primary health, and case management services.

Resource Center Program

The resource center program involves First Step House staff working onsite at the Homeless Resource Center allowing staff to directly engage people who are experiencing homelessness. The program manager is a licensed mental health therapist who performs assessments to determine if a person has a substance use disorder and/or a mental health diagnosis and gathers other clinically relevant information such as trauma, cultural factors, and family history. Through this program, we are able to provide triage, stabilization, conduct assessments, make referrals to treatment, offer support services, and provide case management. The vision for this program is to provide client-centered care and respond to the individual needs of each program participant.

Service Intensive and Bridge Program

In March 2019, First Step House became the operator and service provider at Valor House, a facility located on the Department of Veterans Affairs (VA) campus in Salt Lake City. With this new role, First Step House took on two Grant and Per Diem programs, a 40-unit service intensive program and an 8-unit bridge program. Both of these programs involve helping Veterans with temporary housing and case management services until the Veterans can move into permanent housing. To support the Veterans in these housing units, program staff utilize a variety of models including bridge housing, clinical treatment, and intensive wrap-around services to help homeless Veterans transition to permanent housing.

**Veterans** **Critical Time Intervention Program**

First Step House provides services to Veterans who have substance use and/or mental health disorders in an 18-unit transitional housing program also located at Valor House. This program provides housing, case management services, clinical services, medication distribution and monitoring, transportation, drug testing and monitoring, housing oversight, recovery-supportive recreational activities, and coordination with the Department of Veterans Affairs (VA). Veterans in this program are supported with Grant and Per Diem (GPD) funding from the VA.

Operating Plan 2020

Executive Team Projects

Executive Team

* Update the governance policy
* Review and implement organizational safety goals
* Hold regular meetings of the counsel and evaluate the feasibility of the vision statement
* Create and implement a diversity and inclusion plan

Executive Director

* Lead the permanent supportive housing project at 426 South 500 East
* Implement the current 5th East Apartments permanent supportive housing project
* Continue to build board of director governance capacity
* Continue to implement and report on the community committee plan

Associate Director

* Manage the implementation of the 5th East Apartments permanent supportive housing project
* Manage the implementation of the 426 Apartments permanent supportive housing project
* Lead the REACH relocation and funding sustainability plan

Clinical Director

* Complete the policy and procedure manual for the 5th East Apartments permanent supportive housing project
* Develop specific mental health programming and services
* Create and implement an organizational trauma-informed care plan

Clinical Operations Director

* Lead the REACH relocation and funding sustainability plan
* Lead the implementation of Joint Commission accreditation
* Complete the primary care integration plan

Development Director

* Finalize a comprehensive endowment plan
* Develop and implement an individual donor and major gift plan

Human Resources Director

* Update all organizational job descriptions
* Complete all Joint Commission requirements related to HR
* Complete the affirmative action plan

Medical Director

* Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
* Complete all relevant lab requirements for Joint Commission

Operations Director

* Update departmental job descriptions, create job-specific onboarding plans, and create competence testing for operations managers
* Complete all Joint Commission requirements related to operations

Fundraising Priorities

* Case Management
* Peer Support Services Program
* Long Term Recovery Management
* Treatment Scholarships
* Evidence-based Social Impact Initiative
* Employment Preparation and Placement Program
* Permanent Supportive Housing Gap
* Permanent Supportive Housing Furniture
* Art Donations
* Family Services
* Medical Services
* Recovery Support Services

Organizational Goals

* Safety Goals
  + Set up organizational root cause analysis system
    - Track the number of root cause analyses performed
    - Decrease incidents that are the result of system or process failures
  + Increase handwashing
    - Track handwashing through measuring hand soap purchases as a proportion of the population
  + Decrease the number of medication-related incidents
  + Track staff influenza vaccination rates to gather baseline data
* Outcome Goals
  + Achieve a 50% or higher successful completion rate
  + Maintain a drop-out rate of 24% or less
  + Increase abstinence by 100% or more
  + Increase stable housing by 10% or more
  + Increase employment by 50% or more

Service Lines - Projects and Outcomes

Our programs and departments are divided into service lines and function lines. A service line is a distinct program that provides services to a specific group of customers, including clients, donors, or community partners. Each service line is assigned a leader who is responsible for managing the service line’s budget, projects, and goals. Below is a list of each service line in our organization and the respective major projects and outcomes that will be achieved in the following year.

Case Management Services

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Improve staff Motivational Interviewing skills through fidelity reviews and coaching
  + Complete all Joint Commission requirements related to case management
  + Complete suicide screening for standalone clients
* Outcomes
  + Provide case management services to 70% of all clients
  + Achieve a 40% or higher productivity rate
  + Increase stable housing by more than 10%
  + Increase employment by more than 50%

Community and Stakeholder Services

* Projects
  + Review and update the First Step House organizational presentation
  + Develop and administer a survey to determine what information stakeholders want to review during organizational presentations
  + Elicit feedback from presentation participants through follow-up surveys
* Outcomes
  + Conduct 18 onsite presentations and/or tours of the organization
  + Conduct 18 offsite presentations to community partners

Donor Services

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Update donor software
  + Create a comprehensive fundraising and communications plan
* Outcomes
  + Raise $300,000 in foundation contributions
  + Raise $200,000 in corporate contributions
  + Raise $100,000 in individual contributions
  + Raise $50,000 in event contributions
  + Increase major gift donors, those who donate $500 or more, to 40 donors
  + Enroll 25 people in monthly giving plans
  + Submit 70 grant proposals

Employment Preparation and Placement Program

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete sustainable funding plan
  + Complete Individual Placement and Support fidelity implementation and review
* Outcomes
  + Help 50% of the people who enroll into the program obtain new, full-time employment
  + Help 15% of the people who enroll into the program obtain new, part-time employment

Family and Fatherhood Program

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing

Long Term Recovery Management Program

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete the LTRM policies and procedures
* Outcomes
  + Keep 65% or more participants engaged with First Step House through assessments, telephone check-ins, or surveys for one year
  + Help participants honor 75% of the contracts made with LTRM staff
  + Help an average of five LTRM clients participate in the monthly community service project
  + On 55% of assessments, clients will report abstinence of 90 days or more
  + On 65% of assessments, clients will report attending one or more community-based support groups weekly
  + On 60% of assessments, clients will report being employed since the last assessment
  + On 60% of assessments, clients will report being stably housed since the last assessment
  + On 65% of assessment, clients will report no new legal charges since the last assessment (excluding minor traffic violations)
  + Of the total drug tests administered to LTRM participants, 65% will be negative

Mental Health Court Housing at FSHR House

* Projects
  + Complete a frequently asked questions sheet for new residents
* Outcomes
  + Achieve an average daily census of 95% or more

Outpatient Treatment Program

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Update the treatment planning process according to Joint Commission standards
  + Ensure that the clinical team is completing both suicide and violence assessment and management according to organizational policy
  + Prepare for outpatient move and expansion
* Outcomes
  + Increase capacity to serve 150 unique clients per month
  + Achieve an average daily census above 90 clients
  + Achieve 97% or more of the total productivity goal (i.e., percent time in direct, billable services)
  + Achieve a 72% or higher successful completion rate (i.e., treatment completions plus transfers to residential)
  + Maintain a drop-out rate of 20% or less
  + Maintain an average monthly positive drug test rate of 15% or less
  + Maintain an average monthly no-show rate for drug tests of 20% or less
  + Help 70% of Moral Reconation Therapy (MRT) participants who stay engaged in treatment for a minimum of two weeks successfully complete MRT

Peer Support Services

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Begin a peer support program at the residential 440 facility
* Outcomes
  + Complete a Wellness Recovery Action Plan (WRAP) with 60% or more 411 clients
  + Help 70% or more clients report an improvement in health and wellness
  + Help 60% or more clients who were homeless prior to treatment exit treatment into stable housing
  + Maintain the dropout rate of 20% or lower
  + Help 60% or more clients increase employment status (part-time or full-time)
  + Transport clients to 3 community-based recovery meetings per week
  + Help 60% or more clients complete at least one community service project

REACH Program

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Implement all deficient items from the Correctional Program Checklist evaluation
  + Update the treatment planning process according to Joint Commission standards
  + Ensure that the clinical team is completing both suicide and violence assessment and management accordingto organizational policy
* Outcomes
  + Achieve an average daily census of 95% or more in residential treatment
  + Achieve 97% or more of the total productivity goal
  + Provide 200 or more hours of treatment that targets criminogenic risk factors to at least 75% of clients in the program within six months of services
  + Adhere to the other REACH metrics as defined in the REACH contract

Recovery Residence Program

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Develop policy and procedure manual
* Outcomes
  + Maintain an average daily census of 95% or more
  + Achieve a 75% or higher lease compliance rate
  + Maintain an eviction rate of 25% or less
  + Transfer 75% or more clients to permanent housing

Residential Treatment Program at 411 North Grant Street

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Update the treatment planning process according to Joint Commission standards
  + Ensure that the clinical team is completing both suicide and violence assessment and management according to organizational policy
* Outcomes
  + Achieve an average daily census of 90% or more
  + Achieve 97% or more of the total productivity goal (i.e., percent time in direct, billable services)
  + Achieve a 66% or higher successful completion rate (i.e., treatment completions plus transfers to outpatient)
  + Maintain a drop-out rate of 20% or less
  + Maintain an average monthly positive drug test rate of 5% or less
  + Maintain an average monthly no-show rate for drug tests of 15% or less

Residential Treatment Program at 440 South 500 East

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Update the treatment planning process according to Joint Commission standards
  + Ensure that the clinical team is completing both suicide and violence assessment and management accordingto organizational policy
  + Implement expansion plan
* Outcomes
  + Achieve an average daily census of 90% or more
  + Achieve 97% or more of the total productivity goal (i.e., percent time in direct, billable services)
  + Achieve a 66% or higher successful completion rate (i.e., treatment completions plus transfers to outpatient)
  + Maintain a drop-out rate of 20% or less
  + Maintain an average monthly positive drug test rate of 5% or less
  + Maintain an average monthly no-show rate for drug tests of 10% or less

Resource Center Program

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Create tracking for people who enter treatment
  + Implement all Joint Commission assessment requirements
* Outcomes
  + 50% of the individuals living in the recovery dorm will enroll in treatment
  + 50% of the individuals living in the recovery dorm will become housed
  + 50% of the individuals living in the recovery dorm will improve their employment status

Service Intensive and Bridge Program

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Improve staff Motivational Interviewing skills through fidelity reviews and coaching
  + Complete all Joint Commission requirements related to case management
* Outcomes
  + Achieve an average daily census of 95% or more
  + Ensure that 65% or more Veterans discharge to permanent housing
  + Maintain a negative exit rate of 23% or less
  + Help 50% or more Veterans discharge the program employed

Veterans Critical Time Intervention (CTI) Program

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Update the treatment planning process according to Joint Commission standards
  + Ensure that the clinical team is completing both suicide and violence assessment and management according to organizational policy
* Outcomes
  + Achieve an average daily census of 95% or more
  + Ensure that 65% or more Veterans discharge to permanent housing
  + Maintain a negative exit rate of 23% or less
  + Help 50% or more Veterans discharge the program employed

Function Lines - Projects and Outcomes

Our programs and departments are divided into service lines and function lines. Function lines consist of specific departments that support the service line teams in accomplishing their objectives. Function line leaders are responsible for managing the function line’s budget, projects, and goals. Below is a list of each function line in our organization and the respective projects that will be achieved and outcomes that will be measured in the following year.

Accounting Department

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete the accounting policy and procedure manual
* Outcomes
  + Distribute reports by the 21st of each month

Admissions Department

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Implement all Joint Commission admission and assessment requirements
* Outcomes
  + Report results of admissions satisfaction surveys
  + Report on wait list information including total wait list number, time on wait list, and attrition between referral and enrollment
  + Report on intake no-show rate and reasons

Billing Department

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete the billing policy and procedure manual
  + Complete monthly reconciliation processes for all funding sources
* Outcomes
  + Complete billing for all payors by the 20th of every month

Client Advocate Department

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Implement a client advocate fidelity program that includes regular monitoring and coaching
  + Check for photo identification prior to completing sample collection for drug testing
* Outcomes
  + Report monthly staff meeting attendance percentage
  + Report on the number of days it takes new client advocates to complete the training checklist
  + Maintain a drop-out rate of 24% or less

Data Management Department

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete all data-related Joint Commission requirements
  + Implement reporting processes for all strategic plan metrics
  + Review and document operational definitions for all data systems
* Outcomes
  + Complete and distribute reports by the 20th of every month

Food Services Department

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete all Joint Commission requirements related to food services
* Outcomes
  + Report on customer satisfaction scores

Human Resources Department

* Projects
  + Update all organizational job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete all Joint Commission requirements related to HR
* Outcome
  + Report on employee satisfaction results
  + Report on the number of hires, interviews, terminations, and average tenure
  + Report on the percentage of vacant positions in the organization

IT Committee

* Projects
  + Complete all Joint Commission requirements related to IT
* Outcomes
  + Report on server downtime

Maintenance Department

* Projects
  + Implement electronic maintenance ticketing systems
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete all Joint Commission requirements related to maintenance
* Outcomes
  + Report on outcomes from the electronic maintenance ticketing system

Medical Department

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete all Joint Commission requirements related to the medical department
  + Implement all items from the primary care integration grant
* Outcomes
  + Report on audit results
  + Report on medication training attendance and completion

Quality Assurance Department

* Projects
  + Manage and complete Joint Commission accreditation
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Create audit findings tracking system
* Outcomes
  + Report on the number, type, and score of completed internal audits
  + Report on the number of trainings completed

Transportation Department

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
* Outcomes
  + Report on the price per mile driven

Urinalysis Department

* Projects
  + Update departmental job descriptions, create job-specific onboarding plans, and create competence testing
  + Complete all laboratory Joint Commission requirements
* Outcomes
  + Report on the number of trainings completed
  + Report on UA reporting errors

2020 Budget

July 2019 through June 2020

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Income | | | |  |  |
|  |  | Contributions and Support | | |  |
|  |  |  | Individual Contributions | | 50,000.00 |
|  |  |  | Foundation Contributions | | 176,500.00 |
|  |  |  | Corporate Contributions | | 198,500.00 |
|  |  |  | Special Event | | 20,000.00 |
|  |  | Total Contributions and Support | | | 445,000.00 |
|  |  | Donated Goods | | |  |
|  |  |  | In-Kind Contributions | | 230,800.00 |
|  |  | Total Donated Goods | | | 230,800.00 |
|  |  | Grants and Contracts | | |  |
|  |  |  | Federal | |  |
|  |  |  |  | Veterans Administration - OSAT | 1,209,000.00 |
|  |  |  |  | Veterans Administration - GPD | 536,280.00 |
|  |  |  |  | US Dept of HUD - CoC | 219,294.00 |
|  |  |  | Total Federal | | 1,964,574.00 |
|  |  |  | County | |  |
|  |  |  |  | Salt Lake County - CDBG | 249,704.00 |
|  |  |  |  | Salt Lake County - Health Dept | 28,320.00 |
|  |  |  |  | Salt Lake County - DBHS | 552,000.00 |
|  |  |  | Total County | | 830,024.00 |
|  |  |  | State | |  |
|  |  |  |  | DWS - Food Stamps | 191,256.00 |
|  |  |  |  | DWS - SHF | 103,632.00 |
|  |  |  |  | Medicaid - DOH | 4,065,000.00 |
|  |  |  | Total State | | 4,359,888.00 |
|  |  |  | City | |  |
|  |  |  |  | Salt Lake City - CDBG | 127,612.00 |
|  |  |  | Total City | | 127,612.00 |
|  |  |  | Agency | |  |
|  |  |  |  | Housing Authority of SLC | 780,899.00 |
|  |  |  |  | Housing Connect | 67,968.00 |
|  |  |  |  | Medicaid - Optum | 253,200.00 |
|  |  |  |  | REACH | 1,168,224.00 |
|  |  |  |  | The Road Home | 128,000.00 |
|  |  |  |  | United Way | 5,000.00 |
|  |  |  |  | UTA | 80,400.00 |
|  |  |  | Total Agency | | 2,483,691.00 |
|  |  | Total Grants and Contracts | | | 9,765,789.00 |
|  |  | Revenue from Clients | | |  |
|  |  |  | Client Rent | | 124,464.00 |
|  |  |  | Client Fees | | 1,440.00 |
|  |  | Total Revenue from Clients | | | 125,904.00 |
|  |  | Revenue from Other Sources | | |  |
|  |  |  | Miscellaneous Revenue | | 360.00 |
|  |  |  | Interest Income | | 1,200.00 |
|  |  | Total Revenue from Other Sources | | | 1,560.00 |
|  | Total Income | | | | 10,569,053.00 |
| Gross Profit | | | |  | 10,569,053.00 |
| Expense | | | |  |  |
|  |  | Personnel Expenses | | |  |
|  |  |  | Regular Payroll Expenses | | 6,023,054.00 |
|  |  |  | Payroll PTO Expense | | 120,468.00 |
|  |  |  | Payroll Tax Expense | | 460,770.00 |
|  |  |  | Employee Benefits | | 628,916.00 |
|  |  |  | Workers Compensation Insurance | | 24,492.00 |
|  |  |  | Unemployment Insurance | | 18,072.00 |
|  |  |  | 401(k) | | 150,585.00 |
|  |  |  | Payroll Servicing Fees | | 11,400.00 |
|  |  |  | Misc. Employment Expenses | | 32,000.00 |
|  |  |  | Staff Development | | 116,344.00 |
|  |  |  | Employee Incentives | | 18,600.00 |
|  |  | Total Personnel Expenses | | | 7,604,701.00 |
|  |  | Contractual Services | | |  |
|  |  |  | Accounting Fees | | 30,672.00 |
|  |  |  | Legal Fees | | 22,212.00 |
|  |  |  | IT Services | | 162,384.00 |
|  |  |  | Other Contractual Services | | 95,000.00 |
|  |  | Total Contractual Services | | | 310,268.00 |
|  |  | Non-Personnel Expenses | | |  |
|  |  |  | Fundraising Events | | 9,000.00 |
|  |  |  | Food Service Supplies | | 173,200.00 |
|  |  |  | House Supplies | | 59,280.00 |
|  |  |  | Office Supplies | | 40,008.00 |
|  |  |  | UA Supplies | | 67,932.00 |
|  |  |  | Uniforms | | 2,440.00 |
|  |  |  | IT Supplies | | 7,776.00 |
|  |  |  | Postage & Shipping | | 2,700.00 |
|  |  |  | Donated Materials & Supplies | | 154,800.00 |
|  |  |  | Telephone & Telecommunications | | 93,192.00 |
|  |  |  | Software Expense | | 34,383.00 |
|  |  |  | Events | | 6,000.00 |
|  |  |  | Vehicle Expenses | | 69,225.00 |
|  |  |  | Curriculum | | 31,920.00 |
|  |  |  | Client Recreation & Incentives | | 81,294.00 |
|  |  |  | Client Assistance - Other | | 32,866.00 |
|  |  |  | Client Assistance - Rent | | 150,274.00 |
|  |  | Total Non-Personnel Expenses | | | 1,016,290.00 |
|  |  | Facilities & Equipment Expense | | |  |
|  |  |  | House Maintenance | | 169,668.00 |
|  |  |  | Occupancy Expense | | 277,873.00 |
|  |  |  | Utilities | | 143,652.00 |
|  |  |  | Mortgage Interest | | 124,404.00 |
|  |  |  | Equipment Rental | | 38,988.00 |
|  |  |  | Depreciation & Amortization | | 508,779.00 |
|  |  | Total Facilities & Equipment Expense | | | 1,263,364.00 |
|  |  | General Expenses | | |  |
|  |  |  | Dues & Memberships | | 31,434.00 |
|  |  |  | Meeting Expenses | | 30,258.00 |
|  |  |  | Marketing & Advertising | | 12,350.00 |
|  |  |  | Bank Service Fees | | 10,872.00 |
|  |  |  | Insurance - Non-Employee | | 127,884.00 |
|  |  |  | Travel Expense | | 33,756.00 |
|  |  |  | Licenses and Permits | | 13,675.00 |
|  |  |  | Miscellaneous | | 7,824.00 |
|  |  | Total General Expenses | | | 268,053.00 |
|  |  | Business Expenses | | |  |
|  |  |  | Bad Debt Expense | | 8,280.00 |
|  |  | Total Business Expenses | | | 8,280.00 |
|  | Total Expense | | | | 10,470,956.00 |
| Net Income | | | |  | **98,097.00** |

Implementation

Reporting Plan

Progress on the elements of the strategic plan will be reported at the following meetings

* Twice-Monthly Executive Team Meetings
* Monthly Supervisor Reports and Meetings
* Team Outcomes and Project Implementation Meetings
* Quarterly Board Reports