



## Strategic Plan 2021



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## 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.

### 2020 Highlights

In November 2019, First Step House underwent a three-day survey by the Joint Commission, the leading healthcare accreditation entity in the U.S. In January 2020, First Step House was officially accredited by the Joint Commission for continuous compliance with performance standards and commitment to providing safe, high-quality patient care.

In January 2020, First Step House broke ground on the 426 Apartments, a new permanent supportive housing facility that will be located at 426 South 500 East in Salt Lake City. First Step House and Housing Connect partnered on this new 40-unit complex to house and serve individuals, including Veterans, who are homeless and diagnosed with substance use disorders and mental health conditions. The 426 Apartments will provide housing and the supportive services necessary for people to manage their health conditions, access services, and achieve long-term stability.

Construction on Central City Apartments has continued and is anticipated to be complete in July 2020. Central City Apartments is a 75-unit permanent supportive housing facility located at 434 South 500 East in Salt Lake City. This facility will serve people experiencing homelessness and serious 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 with on-site supportive services on the west side and a clinical outpatient space on the east side.

In April 2020, First Step House closed on a new 60-bed facility to expand the REACH (Recovery, Engagement, Assessment, Career, and Housing) program committed to reducing criminal recidivism in Salt Lake County. This Pay for Success program was launched in July of 2017 and serves formerly incarcerated adult males who have been diagnosed with moderate to severe substance use disorders and are at high risk for recidivism. To purchase the building, First Step House collaborated with Intermountain Healthcare and was the first-ever recipient of a loan from Intermountain's Impact Investing program. This new facility will enable us to double the capacity of the REACH program to meet the needs of our target population and the greater community.

### 2021 Vision

**To stabilize and improve existing First Step House services and successfully implement new programs and projects in our pipeline.**

This year marks a significant milestone in our organization due to the implementation of new housing developments and expansion of existing projects. These include opening two new permanent supportive housing facilities (Central City Apartments and 426 Apartments), expanding recovery residence, growing the REACH program to 60 beds, and locating another property for permanent supportive housing development. Central City Apartments features 75 one-bedroom apartments for people experiencing homelessness and serious mental illness. The building includes the CHARTER (Community Housing and Assertive Response for Treatment-Enhanced Recovery) program, which will provide on-site supportive services necessary for tenants living at Central City Apartments. The building will also feature an outpatient clinic that will serve those with mental health needs ranging from mild to severe. 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 the supportive services necessary to manage their conditions, access services, and achieve long-term stability. These housing projects will also expand our target population and will allow us to serve more women and serve people who have a mental health condition as their primary diagnosis. In Fiscal Year 2021,



First Step House will also relocate and expand the REACH (Recovery, Engagement, Assessment, Career, and Housing) program to a new 60-bed facility and will begin transitioning the program's funding sources. To support First Step House's long-term funding sustainability, we will strive to stabilize our census across programs and achieve capacity at our new housing facilities.

In Fiscal Year 2021, we will make appropriate corrective actions for Joint Commission and ensure that all policies and procedures are complete. To meet the increased healthcare needs of our target population and those most vulnerable in our community, we are broadening our organizational scope to include an on-site medical clinic that will provide immediate and integrated primary care to First Step House clients and tenants.

Over the course of 62 years, First Step House has transitioned from being a half-way house to a licensed, credentialed, and accredited behavioral health treatment and housing provider. We deliver effective residential and outpatient substance use disorder treatment, mental health treatment, robust case management services, primary healthcare, supportive employment, recovery residence services, transitional housing, and, in 2021, permanent supportive housing. To fully support and reflect the organization-wide changes in 2021, we will expand fundraising capacity, stand-up our diversity and inclusion initiatives, and conduct a brand refresh. The brand refresh will include a re-evaluation of our mission, vision, color-scheme, website, and additional marketing components.

In summary, our targeted goals for 2021 are:

- Complete implementation of CHARTER Program & fully lease 5<sup>th</sup> East Apartments
- Complete construction and lease 426 Apartments
- Complete REACH relocation, expansion, and funding transition
- Complete Joint commission corrective actions
- Finish policies and procedures
- Expand recovery residence
- Stabilize the census
- Create implementation plan for starting a medical clinic
- Expand fundraising capacity
- Locate another property to develop more permanent supportive housing
- Conduct diversity & inclusion survey to inform committee goals
- Complete an organizational brand refresh

## The Organization

### Our Mission

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

Our mission statement underlies all that we do at First Step House. We believe that an essential element to building healthy lives is to help people find, or rediscover, a deep sense of meaning and purpose. This begins by showing compassion and respect for every client we serve. During this process, we work to provide the scaffolding our clients need to thrive and build resilience. Examples of this include increasing people's connection to support groups, providing individual therapy, providing 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, we encourage them to give back to the community. We work hard to provide a continuum of services for those with the greatest need and we 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 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-based interventions as well as developing housing capacity, delivering robust case management services, and providing long-term recovery care. We have evolved with the 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 whole health needs and become stable in their lives. 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 lays the foundation for our goal of serving 5,000 people per year by the year 2028 with a range of services that include primary healthcare, behavioral health, supportive 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.

**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. First Step House has evolved into a co-occurring capable, behavioral health treatment and housing provider. First Step House is accredited by the Joint Commission, the leading healthcare



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

accreditation entity in the U.S., for our continuous compliance with performance standards and commitment to providing safe and quality patient care. We have been a consistent leader in the Salt Lake metro area delivering evidence-based interventions and achieving positive outcomes for individuals, Veterans, and families who struggle with high severity substance use disorders, histories of homelessness, mental health conditions, justice system involvement, and primary health concerns. We operate two residential treatment facilities, two outpatient treatment centers, and six transitional housing facilities in Salt Lake County, Utah, including (1) a 70-bed residential treatment center located at 440 South 500 East with 34 beds designated specifically for Veterans and 36 beds designated for Veterans and non-Veterans; (2) a 76-bed residential treatment center located at 411 North Grant Street for low-income adult males with substance use disorders; (3) an outpatient facility located at 2200 South State Street that serves a daily census of 75-100 patients (4) an outpatient facility located at 660 South 200 East dedicated to serving participants in our Pay for Success program, REACH (Recovery, Engagement, Assessment, Career, and Housing), aimed at reducing criminal recidivism for high utilizers of the Salt Lake County jail; and (5) a 66-bed transitional housing facility with on-site supportive services for Veterans located at 720 Valdez Dr. We also operate five additional transitional housing facilities



that are licensed recovery residences; these facilities provide housing for up to 53 people who need a stable, affordable living environment while receiving outpatient treatment services. We are also currently in the process of building 115 units of Permanent Supportive Housing (PSH) for individuals experiencing homelessness, mental health conditions, and substance use disorders. The scope of services we offer include substance use disorder and mental health assessment, residential and outpatient treatment, recovery residence services, housing, case management, employment support, primary health care, peer support services, and long-term recovery management. Through our programs, we serve over 1,000 individuals per year- many of whom arrive at our doorstep with very little resources, lack of family support, and numerous barriers to overcome.

## Program Descriptions

### 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 a needs assessment with 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, including housing, financial resources, education services, career development, legal services, vocational training, employment, medical services, dental services, community support, and health insurance. Case managers ensure clients reduce barriers to long-term stability and housing by helping them identify housing opportunities in the community and working with partner agencies to connect clients to housing programs and vouchers that best suit the individual's situation.

### CHARTER Supportive Living

The CHARTER (Community Housing and Assertive Response for Treatment-Enhanced Recovery) program will provide on-site supportive living services necessary for tenants living at Central City Apartments to build stable and healthy lives of meaning, purpose, and recovery. Our goal for every resident of the Central City Apartments is to ensure that individuals have opportunity to improve their health and wellness, live a self-directed life and the resources to strive to reach their full potential. This includes; stability in housing, reduce harm, decrease the need for hospitalization, and support the development of pro-social relationships. We are committed to a housing first model, client-centered services, pro-active engagement and support, trauma-informed care, increasing accessibility and reducing barriers for all services, and a harm reduction approach.

### 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 healthy 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.

### 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.

### Medical Services



The goal of our medical services is to provide immediate, on-site, and integrated primary care to meet the medical needs of low-income people receiving behavioral health treatment and/or housing services at First Step House. Our medical team is responsible for expanding internal capacity and external relationships needed to effectively screen, assess, treat, and manage our clients' primary healthcare needs. Our medical services work to fully understand and effectively address our clients' medical needs at each stage of their engagement, including admission, treatment, and discharge.

### **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 - Mental Health Treatment**

Our mental health outpatient program allows us to serve those struggling with serious mental illness (SMI), as well as those struggling with mild to moderate mental health conditions. Treatment services will be dependent on the need of each individual and may include a comprehensive mental health assessment, individual therapy, group therapy, psychoeducation classes, medication management, and/or case management services.

### **Outpatient - Substance Use Disorder 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 prosocial 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 - Fairpark Campus**

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 - Central City Campus**





Our facility at 440 South 500 East is a 70-bed residential treatment center that includes 34 beds designated for Veterans. At this location, 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 of 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.

## **Committee Missions**

### **Education Committee**

Our mission is to streamline FSH education efforts by improving the presentation of educational materials in a way that addresses different learning styles and needs while minimizing educational workload for staff.

### **Diversity, Equity, and Inclusion Committee**

Our mission is to advance, celebrate, and facilitate ongoing initiatives to foster a diverse, equitable, and inclusive culture for our clients, staff, and greater community.

### **Wellness Committee**

The Wellness Committee's mission is to inspire holistic health and wellness opportunities and awareness within FSH culture.

## **Operating Plan 2020**

### **Executive Team Projects**

#### **Executive Team**

- Hold regular meetings of the counsel and evaluate the feasibility of the vision statement

#### **Executive Director**



- Lead the 426 Apartments permanent supportive housing project Lead the 5<sup>th</sup> East Apartments permanent supportive housing project
- Continue to build the board of director's governance capacity
- Increase the board of director's fundraising capacity

### Associate Director

- Manage the implementation of the 5<sup>th</sup> East Apartments permanent supportive housing project
- Manage the implementation of the 426 Apartments permanent supportive housing project
- Lead the REACH relocation project
- Locate additional properties for future permanent supportive housing projects

### Clinical Director

- Implement the CHARTER & Outpatient Mental Health programs
- Implement programming for the 426 Apartments permanent supportive housing project
- Continue to develop the organizational trauma-informed care plan
- Refine the functioning and team integration of the recovery support staff

### Clinical Operations Director

- Lead the REACH relocation and funding sustainability plan
- Lead the implementation of the outstanding Joint Commission items
- Lead the development of a medical clinic

### Development Director

- Finalize a comprehensive endowment plan
- Implement the individual donor and major gift plan

### Finance Director

- Assist the development department with the establishment of the endowment plan
- Transition the billing department under the Finance Director

### Human Resources Director

- Update the employee engagement and satisfaction survey
- Complete the affirmative action plan
- Implement a hiring, onboarding, and retention strategy to ensure that all new programs are adequately staffed

### Operations Director

- Complete preparations of 950 East 3300 South
- Restructure food and transportation departments to address the pending increase in capacity

### Fundraising Priorities

- Medical Services
- 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
- Art Donations
- Recovery Support Services
- COVID-19 Support

## Organizational Goals

- Safety Goals
  - Track the number of root cause analyses performed



- Decrease reportable incidents that are the result of system or process failures
- Track handwashing through measuring organizational hand soap purchases
- Decrease the number of medication-related incidents
- Increase staff influenza vaccination rates
- 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

## Committees

### Education Committee

- Provide learning tools for staff related to one focused objective every other month

### Diversity and Inclusion Committee

- Send the diversity & inclusion survey to all staff and clients
- Gather feedback and develop one outcome and one project for the year based on the data from the survey

### Wellness Committee

- Establish a calendar of both health- and wellness-oriented events that embrace, educate, and promote various perspectives of health
- Organize three health and wellness challenges, two social events, and a monthly committee meeting
- Achieve an average of 50% employee involvement among scheduled events throughout the year

## 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
  - Create and complete competence testing for all departmental positions
  - Improve staff Motivational Interviewing skills through fidelity reviews and coaching
  - Complete case management file audits
- Outcomes
  - Provide case management services to 70% of all SUD treatment 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
  - Develop and administer a survey to determine what stakeholders need or want from FSH
- Outcomes
  - Conduct 12 presentations and/or tours of the organization

### CHARTER Supportive Living

- Projects
  - Launch the CHARTER project
  - Complete fidelity checks for the program
- Outcomes



- Achieve a 90% average daily occupancy rate

### Donor Services

- Projects
  - Create and complete competence testing for all departmental positions
  - Implement the current fundraising and communications plan
  - Create a comprehensive fundraising and communications plan for 2022
  - Complete an organization-wide brand refresh
- 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
  - Create and complete competence testing for all departmental positions
  - Implement an alternative funding plan during the first quarter
  - Implement recommendations from the fidelity review
- Outcomes
  - Help 50% of the people who enroll into the program obtain new employment
  - Help 15% of the people who enroll into the program increase their income by 15%

### Long Term Recovery Management (LTRM) Program

- Projects
  - Create and complete competence testing for all departmental positions
  - Complete the LTRM policy and procedures manual
- Outcomes
  - Of those who enroll in LTRM, 75% will stay engaged in LTRM services for at least 6 months
  - Of those who enroll in LTRM, 65% will stay engaged in LTRM services for at least 1 year
  - 60% of clients who complete treatment will enroll in LTRM
  - 75% of LTRM clients will adhere to their long-term recovery agreements while enrolled
  - 55% of LTRM clients will report abstinence at quarterly assessments
  - 65% of LTRM clients will report attending an average of one community-based support group per week at quarterly assessments
  - LTRM clients will report being employed for 60% of the time since enrolled in LTRM
  - LTRM clients will report being stably housing for 65% of the time since enrolled in LTRM
  - 80% of LTRM clients will not report new legal charges at quarterly assessments

### Medical Department

- Projects
  - Create and complete competence testing for all departmental positions
  - Create a medical clinic implementation checklist and plan
- Outcomes
  - Report on the number of patient visits
  - Report on the number of audits completed

### Mental Health Court Housing at FSHR House

- Outcomes
  - Achieve an average daily census of 95% or more

### Outpatient - Substance Use Disorder Treatment



- Projects
  - Have therapists complete all competence testing
  - Ensure that therapists are competent at submitting effective, timely concurrent reviews
  - Prepare for outpatient move and expansion
- Outcomes
  - Increase capacity to serve 150 unique clients per month
  - 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 Reconciliation Therapy (MRT) participants who stay engaged in treatment for a minimum of two weeks successfully complete MRT

### Outpatient - Mental Health Treatment

- Projects
  - Hire and train the outpatient mental health team

### Peer Support Services

- Projects
  - Create and complete competence testing for all staff
  - Ensure that all programs are fully staffed, and staff are properly trained
- Outcomes
  - Complete a Wellness Recovery Action Plan (WRAP) with 60% or more 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
  - 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
  - Create and complete competence testing for all program positions
  - Implement all deficient items from the Correctional Program Checklist evaluation
  - Ensure that billing and treatment planning are fully operational
  - Update policies and procedures to address relocation needs
  - Ensure that census is full prior to relocation
  - Plan and implement the program relocation to 950 East 3300 South
- Outcomes
  - Achieve 0 funding gaps
  - Achieve an average daily census of 90% 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

### Recovery Residence Program

- Projects
  - Plan and implement the expansion of recovery residence to 16 beds
- 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 - Fairpark Campus

- Projects
  - Have therapists complete all competence testing



- Evaluate and implement evidence-based practices in evening hours that can be administered by Substance Use Disorder Counselors (SUDC)
- Ensure that therapists are competent at submitting effective, timely concurrent reviews
- Outcomes
  - Achieve 0 funding gaps
  - 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 - Central City Campus

- Projects
  - Have therapists complete all competence testing
  - Ensure that therapists are competent at submitting effective, timely concurrent reviews
- Outcomes
  - Achieve 0 funding gaps
  - 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
  - Create and complete competence testing for all program positions
- 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
  - Create and complete competence testing for all program positions
  - Improve staff Motivational Interviewing skills through fidelity reviews and coaching
  - Evolve the program to address the requirements of the new grant
- 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
  - Create and complete competence testing for all program positions
  - Ensure that treatment planning is completed according to standards
  - Evolve the program to address the requirements of the new grant
- 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
  - Create and complete competence testing for all departmental positions
- Outcomes
  - Distribute reports by the 21<sup>st</sup> of each month

### Admissions Department

- Projects
  - Create and complete competence testing for all departmental positions
  - Integrate with REACH admissions department
  - Hire and train additional staff to address the increase in census
- Outcomes
  - Report on intake no-show rate and reasons
  - Ensure that all census goals are met

### Billing Department

- Projects
  - Create and complete competence testing for all department positions
  - Complete the billing calendar and schedule
  - Complete reconciliation for every payor every month
  - Complete authorization gap report and ensure monthly submission
  - Expand capacity for mental health, medical, and REACH billing
  - Complete the billing policy and procedure manual
- Outcomes
  - Complete billing for all payors by the 20<sup>th</sup> of every month
  - Complete reconciliation by the end of each month

### Data Management Department

- Projects
  - Create and complete competence testing
  - Implement reporting processes for all strategic plan metrics
  - Review and document operational definitions for all data
- Outcomes
  - Complete and distribute reports by the 20<sup>th</sup> of every month

### Food Services Department

- Projects
  - Create and complete competence testing for all department positions
  - Complete the food services policy and procedure manual
  - Prepare for the REACH relocation and expansion in January
- Outcomes
  - Report on customer satisfaction scores

### Human Resources Department

- Projects
  - Create and complete competence testing for all department positions
  - Update employee engagement and satisfaction survey
  - Complete the affirmative action plan
  - Implement a hiring, onboarding, and retention strategy to ensure that all new programs are adequately staffed



- Outcome
  - Report on employee satisfaction results
  - Report on the number of hires, interviews, terminations, and average tenure
  - Report on the total vacant positions in the organization

### IT Department

- Projects
  - Update network topology
  - Establish point-to-point connection between Valor House and 434 South 500 East
- Outcomes
  - Report on employee satisfaction with IT

### Maintenance Department

- Projects
  - Create and complete competence testing for all department positions
  - Implement electronic maintenance ticketing systems
  - Prepare department for the REACH relocation and expansion in January
- Outcomes
  - Report on outcomes from the electronic maintenance ticketing system

### Quality Assurance Department

- Projects
  - Create and complete competence testing for all department positions
  - Ensure that joint commission accreditation is completed for all new programs (REACH, CHARTER, Medical Clinic)
- Outcomes
  - Report on the internal audits that are completed
  - Report on the number of trainings completed

### Recovery Support Staff Department

- Projects
  - Complete competence testing for all staff
  - Train staff in trauma informed care
  - Train staff in de-escalation training
  - Complete fidelity checks during shifts
- 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

### Transportation Department

- Projects
  - Create and complete competence testing for all department positions
  - Prepare department for the start of CHARTER and the REACH relocation and expansion projects
- Outcomes
  - Report on the price per mile driven

### Urinalysis Department

- Projects
  - Prepare department for the REACH relocation and expansion in January
- Outcomes
  - Report on the number of trainings completed





## 2021 Budget

### July 2020 through June 2021

#### Income

Contributions and Support	
Individual Contributions	55,000.00
Foundation Contributions	191,000.00
Corporate Contributions	178,000.00
Special Event	40,000.00
<b>Total Contributions and Support</b>	<b>464,000.00</b>
Donated Goods	
In-Kind Contributions	146,400.00
<b>Total Donated Goods</b>	<b>146,400.00</b>
Grants and Contracts	
Federal	
Veterans Administration - OSAT	1,292,450.00
Veterans Administration - GPD	556,520.00
US Dept of HUD - CoC	71,000.00
<b>Total Federal</b>	<b>1,919,970.00</b>
County	
Salt Lake County - CDBG	136,061.00
Salt Lake County - SSBG	57,728.00
Salt Lake County - DBHS	592,842.00
<b>Total County</b>	<b>786,631.00</b>
State	
DWS - Food Stamps	150,838.00
DWS - SHF	133,888.00
Medicaid - DOH	4,356,589.00
<b>Total State</b>	<b>4,641,315.00</b>
City	
Salt Lake City - FOF	218,000.00
Salt Lake City - ESG	72,000.00
Salt Lake City - CDBG	97,000.00
<b>Total City</b>	<b>387,000.00</b>
Agency	
Medicaid - ACOs	618,854.00
Housing Authority of SLC	869,770.00
Housing Connect	235,008.00
Medicaid - Optum	1,534,098.00
REACH	596,013.00
The Road Home	108,000.00
UTA	94,320.00
<b>Total Agency</b>	<b>4,056,063.00</b>



Other Contract Revenue	
Intercompany revenues - 426 Apt	17,502.00
<b>Total Other Contract Revenue</b>	<b>17,502.00</b>
<b>Total Grants and Contracts</b>	<b>11,808,481.00</b>
Revenue from Clients	
Client Rent	86,876.00
<b>Total Revenue from Clients</b>	<b>86,876.00</b>
Revenue from Other Sources	
Miscellaneous Revenue	3,240.00
Interest Income	13,200.00
<b>Total Revenue from Other Sources</b>	<b>16,440.00</b>
<b>Total Income</b>	<b>12,522,197.00</b>
<b>Gross Profit</b>	<b>12,522,197.00</b>

### Expense

Personnel Expenses	
Regular Payroll Expenses	8,190,240.00
Payroll PTO Expense	155,619.00
Payroll Tax Expense	626,556.00
Employee Benefits	758,869.00
Workers Compensation Insurance	38,400.00
Unemployment Insurance	32,763.00
401(k)	122,865.00
Payroll Servicing Fees	20,487.00
Misc. Employment Expenses	57,339.00
Staff Development	122,945.00
Employee Incentives	18,600.00
<b>Total Personnel Expenses</b>	<b>10,144,683.00</b>
Contractual Services	
Accounting Fees	30,000.00
Legal Fees	33,420.00
IT Services	169,188.00
Other Contractual Services	34,910.00
<b>Total Contractual Services</b>	<b>267,518.00</b>
Non-Personnel Expenses	
Fundraising Events	7,500.00
Food Service Supplies	185,200.00
House Supplies	71,330.00
Office Supplies	66,336.00
UA Supplies	77,772.00
Uniforms	8,206.00
IT Supplies	67,500.00
Postage & Shipping	3,300.00
Donated Materials & Supplies	146,400.00
Telephone & Telecommunications	138,048.00



Software Expense	43,702.00
Events	1,500.00
Vehicle Expenses	76,192.00
Curriculum	33,684.00
Client Recreation & Incentives	89,778.00
Client Assistance - Other	67,562.00
Client Assistance - Rent	141,146.00
<b>Total Non-Personnel Expenses</b>	<b>1,225,156.00</b>
<b>Facilities &amp; Equipment Expense</b>	
House Maintenance	191,090.00
Occupancy Expense	294,230.54
Utilities	153,984.00
Mortgage Interest	142,532.00
Equipment Rental	39,222.00
Depreciation & Amortization	405,526.00
<b>Total Facilities &amp; Equipment Expense</b>	<b>1,226,584.54</b>
<b>General Expenses</b>	
Dues & Memberships	17,948.00
Meeting Expenses	20,850.00
Marketing & Advertising	9,350.00
Bank Service Fees	11,280.00
Insurance - Non-Employee	149,833.64
Licenses and Permits	18,308.00
Miscellaneous	15,400.00
<b>Total General Expenses</b>	<b>268,053.00</b>
<b>Business Expenses</b>	
Bad Debt Expense	8,580.00
<b>Total Business Expenses</b>	<b>8,580.00</b>
<b>Total Expense</b>	<b>13,115,491.18</b>
<b>Net Ordinary Income</b>	<b>(593,294.18)</b>
<b>Other Income</b>	
Housing Development Expense	1,367,057.00
<b>Total Other Income</b>	<b>1,367,057.00</b>
<b>Other Expense</b>	
Housing Development Expense	683,528.00
<b>Total Other Expense</b>	<b>683,528.00</b>
<b>Net Other Income</b>	<b>683,528.00</b>
<b>Net Income</b>	<b>90,234.82</b>

