

# Amethyst House

## Strategic Plan

### **Mission**

Amethyst House provides a foundation for recovery by partnering with individuals, families and communities impacted by addictions and substance-abuse issues, offering high-quality residential and outpatient treatment services and guidance for healthy living.

### **Brand Statement**

Building foundations for recovery.

### **Vision**

Amethyst House will promote a world where:

- Recovery services are accessible to all,
- The stigma of addiction is eliminated, and
- Life-long recovery is a reality.

### **Values**

Amethyst House conducts its business in a way that reflects:

- A client focused and evidence-based approach,
- Respect in all interpersonal interactions,
- The concept that addiction is a disease,
- A Twelve step process,
- Full accessibility to recovery services,
- Acceptance of the most challenging cases within our scope of practice
- The importance of personal accountability and integrity,
- Continuous improvement in our process, and
- That hope and compassion are paramount in our efforts.

### **Preface**

This plan was originally developed in 2010-11 by the Strategic Planning Committee (SPC) and updated annually by the agency directors and the following board committees: Finance, Fundraising, Governance, and Program. The Plan is presented at the Board and Staff Retreat.

The purpose is to understand the agency's needs in a rapidly changing environment and to make recommendations for Board approval in a way that: Spans a 2 – 3 year time frame, provides direction and monitoring for Board and Staff efforts and is inclusive of all ideas, concepts, and notions and exclusive of none. In our 42<sup>nd</sup> year of operation we are an institution that is essential for our community's health and growth. Our organizational infrastructure and financial plan will allow us to continue that role in this rapidly changing environment. The agency will continue to grow vertically, not horizontally, but open to opportunities.

# Strategic Goal Areas

Program  
Organizational  
Financial  
Fundraising / PR  
Board Development  
Collaboration

## **A) Program**

Goal: Maintain high standards for program operations

Objectives:

- 1) Utilize best practices:
- 2) Maintain high quality clinical documentation
- 3) Improve program outcomes
- 4) Improve client satisfaction

## **B) Organizational**

Goal: Improve service quality by increasing efficiency

Objectives:

- 1) Hire quality, and qualified staff
- 2) Strive for staff diversity
- 3) Maintain staff professionalism and accountability
- 4) Support staff in continuing education and credentialing
- 5) Protect the equity and value of physical assets by regular maintenance
- 6) Utilize new technologies as they become available

## **C) Financial**

Goal: Ensure fiscal responsibility

Objectives:

- 1) Utilize best practices according to Federal and State accounting guidelines.
- 2) Keep a balanced budget
- 3) Be transparent
- 4) Establish & maintain a reserve fund
- 5) Identify & pursue new revenue sources

## **D) Fundraising / PR**

Goal: Raise funds and awareness

Objectives:

- 1) Cultivate relationships with stakeholders/funders & expand donor database
- 2) Fundraising Events / Income
- 3) Develop a Media plan
- 4) Cultivate Board/Client involvement

## **E) Board Development**

Goal: Maintain a strong and effective Board of Directors to lead the organization

Objectives:

- 1) Recruit passionate board members with Time, Talent, and Treasury
- 2) Strive for diversity among board members
- 3) Maintain a full board of directors (minimum of 8)
- 4) Increase board involvement in fundraising and special events

## **F) Collaboration**

Goal: Work with other agencies and stakeholders to assist in providing quality programming.

Objectives:

- 1) Provide support to clients in all areas needed through collaborations with community agencies.
- 2) Strengthen existing and build new relationships with stakeholders.
- 3) Continue community outreach activities, following at minimum the standards / requirements of DMHA.
- 4) Collect alumni feedback regarding programming.

# Operational Plan

Purpose: To outline short term annual goals that support the long term Strategic Plan.

## **A) Program**

**Goal: Maintain high standards for program operations**

Objectives (numbered) & Metrics (lettered):

- 1) Utilize best practices
  - a) Program Committee will review clinical documentation processes, measurement tools, and clinical policies and procedures to ensure that programs are utilizing best practices in all services. It is the goal of this committee to research new tools that are evidenced-based to assist in the delivery of services.
  - b) Program Committee will assist in the planning, preparation and follow-up of all agency audits.
- 2) Maintain high quality clinical documentation
  - a) Peer Chart Reviews will be conducted by all counselors; aimed at reviewing 10% of each counselor's caseload; and aimed at 90% compliance with documentation standards. Program Committee will discuss any patterns of errors or other notable findings as they result from Clinical Director's evaluation of the total number of chart reviews conducted annually.
- 3) Improve client satisfaction
  - a) Distribute Program Evaluation questionnaires to a minimum of 80% of clients completing the program as assigned to them with a goal of receiving 85% positive responses (i.e. "Agree" or "Strongly Agree"). Committee will review findings at first meeting in new year in order to suggest any changes to improve client satisfaction.

- 4) Review protocols to assist in providing an environment that is comfortable and safe for clients
  - a) Continue to evaluate and improve quality of trauma-informed services
  - b) Critical incidents will be reviewed annually in an effort to reduce risk
  - c) Covid 19 protocols will be reported and reviewed at each committee meeting
- 5) Assess staffing needs
  - a) Program Committee will receive a report each month of hires, resignations and open positions in order to provide support and training as needed

## **B) Organizational**

### **Goal: Improve service quality by increasing efficiency**

Objectives (numbered) & Metrics (lettered):

- 1) Hire quality, and qualified staff
  - a) Outpatient Counselors will have a Master's Degree and working toward or have an LCSW, LMFT, LCAC, or LMFT.
  - b) Amethyst House will have an HSPP on staff.
- 2) Case Managers Residential Technicians are encouraged to pursue ICAADA certification.
- 3) Support staff in continuing education and credentialing.
  - a) Regular trainings available to all staff through in-services and Relias.
  - b) Continue paying for staff trainings and a portion of cost to obtain credentials.
- 4) Strive for staff diversity
  - a) Demonstrate an awareness of, respect for, and attention to diversity by striving to hire diverse staff.
  - b) Provide cultural diversity trainings for staff .
- 5) Maintain staff professionalism and accountability
  - a) Emphasize staff professionalism.
  - b) Supervisors must complete annual staff evaluations on a timely basis.
  - c) Staff required to obtain rating of 3.5 or higher on annual performance evaluations, aiming for a rating of 4 or above on quality and quantity of work.
- 6) Protect the equity and value of physical assets by regular maintenance
  - a) Develop a maintenance schedule for repairs and a system for reporting repair requests. (monthly walk thru, report to Safety Committee).
  - b) Address maintenance issues in a timely manner.
- 7) Utilize new technologies as they become available
  - a) Develop and adhere to a technology replacement schedule and adjust yearly budget accordingly.
  - b) Continue to explore new technologies and pay for trainings.

## **C) Financial**

### **Goal: Ensure fiscal responsibility**

Objectives (numbered) & Metrics (lettered):

- 1) Utilize best practices according to Federal and State accounting guidelines.
  - a) All annual audits without any adverse findings
  - b) Adhere to the Line of Credit Policy guidelines

- c) Maintain 80% capacity at the houses and outpatient groups
  - d) Review the net benefit of our Evansville sub-contract annually
- 2) Keep a balanced budget
  - a) Yearly positive cash flow
- 3) Be transparent
  - a) Make financial statements available for review for public by request
  - b) Finance Committee meet a min of 10 months out of the year to review finances
  - c) Finance Committee will include a min of 3 board members
- 4) Maintain a reserve fund
  - a) Payoff the remaining loan with German American Bank by 12/31/22
  - b) Maintain cash reserve of 3 months' worth of expenses \$375,000.
  - c) Continue to add funds into the investment account as funds are available.
  - d) Add budgeted depreciation minus any capital outlays into our depreciation savings account with a cap of \$50,000.
- 5) Identify & pursue new revenue sources
  - a) Continue to watch for and review new revenue opportunities

## **D) Fundraising / PR**

### **Goal: Raise funds and awareness**

Objectives (numbered) & Metrics (lettered):

- 1) Cultivate relationships with stakeholders/funders & expand donor database
  - a) Talk to members of the community regarding AH on a monthly basis
- 2) Fundraising Events / Income
  - a) Set a fundraising goal annually
  - b) Continue to host events that focus on fundraising
- 3) Maintain Social Media plan
  - a) Utilize e-Newsletters, Facebook, Instagram, Twitter, and our website.
- 4) Cultivate Board/Client and Board/Staff involvement
  - a) Host annual Celebration & Alumni Picnic
  - b) Board members attend house meetings and annual Holiday dinner
  - c) Encourage all staff and board members to attend Annual Board / Staff Retreat and all fundraising events.

## **E) Board Development**

### **Goal: Maintain a strong and effective Board of Directors to lead the organization**

Objectives (numbered) & Metrics (lettered):

- 1) Recruit passionate board members with Time, Talent, and Treasury
  - a) Recruit members that are able to commit time to attending meeting and functions.
  - b) Utilize board members talents to support the agency.
  - c) Increase financial support from board members yearly. All board members make at least one contribution annually. Promote the use of NAP credit purchases by board members.
- 2) Strive for diversity among board members
  - a) Diversify board composition
- 3) Maintain a full board of directors
  - a) Strive for 12 active board members

- 4) Assist the organization into the future
  - a) Continue to complete orientation for new board members including facility tours and providing board binders.
  - b) Increase board member knowledge, awareness, and appreciation of our organizational mission by requiring board members to attend at least one house meeting per year, the annual board retreat, attend special events.
- 5) Maintain board involvement
  - a) Promote ongoing participation with fundraising events.
  - b) Promote ongoing participation with assigned committee(s).
  - c) Stress importance of attending board meetings and getting a proxy if needed.

## **F) Collaboration**

Goal: Work with other agencies and stakeholders to assist in providing quality programming.

Objectives (numbered) & Metrics (lettered):

- 1) Provide support to clients in all areas needed through collaborations with community agencies.
  - a) Network with local agencies for resources to serve our clients' needs, by maintaining a list of identified client needs and the agencies with which AH has collaborated to address clients' needs.
- 2) Strengthen existing and build new relationships with stakeholders.
  - a) Communicate program successes and needs of agency with stakeholders through social media and community events,
  - b) Create and distribute an annual executive summary to community contacts.
  - c) Distribute satisfaction questionnaires to stakeholders at least once annually to receive feedback regarding the quality of AH programming, and possible areas for improvement.
  - d) Continue to sponsor community events; maintain a list of events held throughout the year and approximate number of attendants and/or attendance of important stakeholders.
  - e) Keep a record of any new relationships developed each year.
- 3) Continue community outreach activities, following at minimum the standards / requirements of the DMHA.
  - a) Maintain a list of outreach activities carried out throughout the year and approximate number of people reached, assuring in a quarterly basis that standards / requirements of the DMHA.
- 4) Collect alumni feedback regarding programming.
  - a) Collect feedback from AH alumni through Program Evaluation forms and exit interviews. Goal: 95% of clients completing the program will have an exit interview and 80% will complete a Program Evaluation (it is voluntary participation). Results of these evaluations will be reviewed by Program Committee annually in order to monitor quality of services and assess if any changes are needed.