

INNOVATING TRANSFORMATION
TO LIVING A WELL LIFE

Strategic Plan

2021/2023





Innovating Transformation to Living a Well Life

As the title to our plan indicates, the strategic plan of WellLife Network will have a focus of transformative innovation throughout the entire organization. Key components of the plan goals are to encourage our team, residents and participants to approach each day with a new perspective that encompasses opportunities for evolving and adapting to change, utilizing entrepreneurial spirit in our thinking and always trying to enhance and streamline the processes we employ. Our organization also continues its goal and commitment to investing deeply in our most important asset — our team.




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Our Mission

WellLife Network embraces its commitment to the complex challenges faced by individuals and families throughout New York and Long Island communities. Our goal is to empower individuals and families, with diverse needs, to realize their full potential and live a well life by achieving meaningful life goals, guided by the principles of independence, health, wellness, safety and recovery.



Planning
the Future
Today

Background

The Provider of Choice for Health & Human Services

For four decades, WellLife Network has changed, evolved and expanded, while remaining true to its mission of meeting the diverse needs of New York communities, business and society and assisting those we serve to achieve greater personal and economic independence. WellLife Network has a long and valued tradition of working in partnership with government, the business community, private philanthropy, and our colleagues in the nonprofit sector to offer proactive responses to society's social and economic challenges.

Since its founding, WellLife Network's culture has been marked by program growth and organizational development. Initially a modest organization offering residential services, WellLife Network has significantly expanded over time to address emerging community needs. As the agency has developed, major initiatives have been set in place serving new client populations. In 2011, our Long Island services expanded significantly through a merger with the Pederson-Krag Center. This merger added family and children's services along with substance disorder services to our program portfolio.

WellLife Network's annual operating budget has experienced significant growth from its beginnings in 1980 of \$230,000 to a budget of \$115 million today. With a workforce of 1,800 team members, interns and volunteers, WellLife delivers critical services in the areas of behavioral health, intellectual/developmental disabilities, substance use disorders, vocational training and care management. These services meet the pressing needs of more than 25,000 individuals and families annually, and 2,500 New Yorkers every single day. A culture of caring, best practice models, a spirit of innovation, a commitment to measuring results and producing a solid return on investment drive our work.

Background

continued

A Flexible Strategically-Oriented Agency

A key element to our successful growth is our focus on technology, responsible fiscal policy and other critical infrastructure supports that enable WellLife Network to deliver services with cost-efficiency, effectiveness, transparency and accountability in a manner that mirrors the standards of high-performing business enterprises.

WellLife Network has evolved and grown and today is guided by principles of ethics, integrity, flexibility, integration, collaboration and models of care, based on new economies of scale. WellLife Network's approach to

strategic planning is to be "*Strategically Opportunistic*" — to engage in the kind of long-term planning that is necessary to continue to strategically position WellLife Network for the future, while remaining nimble and flexible enough to take advantage of new opportunities as they arise.

Our prior strategic plan was called "*A Path to Excellence*" and its primary focus was to pause our growth process in order to examine our internal processes and strengthen our core business plans. In reassessing our program portfolio and examining the changing reimbursement environment for this strategic plan, it became apparent WellLife Network's core business is dedicated to providing safe, secure and nurturing housing opportunities for all populations we serve. To enhance and support these experiences we have complimentary community services, vocational and care management services as well as community outreach trainings and support. Based on this assessment and the exploding need in our service area, a primary area of growth for our organization has been and will

continue to be affordable mixed-use housing. We are currently expanding our footprint in this area with a 66-unit residence that will open in the summer of 2022 in Queens. Plans are also underway to develop additional sites located in Queens, Brooklyn, the Bronx, Nassau, and Suffolk as real estate becomes available. An evaluation of our current holdings is also underway to determine if all sites are being utilized at their highest and best use.

2020 brought an unexpected challenge to WellLife Network as well as the world around us with the COVID 19 Pandemic. This unprecedented situation created a need for our organization to rapidly adapt and evolve our workflows to protect and continue serving all of our individuals and families. At the same time, we found a way to protect and support our team to enable them to provide these vital services. This proved to be a time of great learning and opportunity for our agency to expand into new modalities of service that included utilizing telehealth and supporting a remote workforce. At the same time, the reimbursement

environment became very uncertain as all governmental systems were taxed beyond expectation with the extreme change in the employment levels and spending patterns of society. With the passage of the CARES Act and its amendments, WellLife Network stabilizes and maintains its workforce and more importantly continues to provide excellent care to all individuals and families we serve. The need to remain flexible and prepared for the unexpected will play a key part in our strategic planning in the years ahead.

Our strategic partnerships with various Independent Practice Associations has proved to be an important support system through these challenging times. These relationships continue to position and prepare our organization to transition further into the emerging managed care reimbursement environment. Being centers of learning and support, WellLife will utilize and leverage these partnerships to provide opportunities to participate in collaborative rate negotiations and program expansions as the managed care organizations design and expand the service needs in the New York area. Continued efforts in strengthening our service delivery processes will be a vital component of our plans moving forward.

WellLife Network's mission of helping people achieve greater personal and economic independence takes on a new level of importance and is displayed

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in various forms among the range of populations we serve — from the person with serious mental illness who learns to manage his/her medications independently, avoid hospitalization and live in the community; to the individual with developmental disabilities learning to travel independently on the bus/subway to a part-time job; to an individual finding an alternative to the ravages of substance abuse; to a family with a child coping with mental health issues and facing institutionalization – finding alternatives to keep that child at home and more. Although the interventions and services are different across these populations, at the highest level, the goal of helping people achieve the greatest possible personal and economic independence and reintegration to the community becomes the basis of our work.

One fundamental element of being successful in this transitioning market is having an engaged and fulfilled workforce. Supporting and empowering

our staff is one of the key components of WellLife Network's strategic plan. Through enhanced training and improvements in our technological solutions, we will focus our efforts on providing resources to our most important asset – our employees. In order to achieve great outcomes, it is imperative to have a well-trained and satisfied workforce. Establishment of a training curriculum, a mentoring program and a comprehensive evaluation process will ensure that those we serve are receiving the best possible experience.

WellLife Network is committed to being the provider of choice, known for high quality, mission and outcome-driven and life-changing services. We help people achieve their health and life goals. Working with each individual to determine their unique needs, our integrated service delivery network assists individuals to navigate through the programs and wide array of supports they need, when they need them.

Our Vision

WellLife Network will increase its scale and capabilities to thrive and grow in a changing health care environment. Our vision is to be a leading fiscally responsible and pioneering health and human services organization that provides integrated, high-quality, and outcome-based services that are mission-driven and responsive to the diverse needs of individuals, families, communities, business, and society.



Planning the Future Today

Goals

Innovative, Integrated, High Quality Services and Support Address Current Challenges

WellLife Network is driven to deliver high quality, integrated services and interventions that address individual, family, community, personal, social, health and economic challenges. In developing this strategic plan, a careful evaluation was performed. A comprehensive examination of our Mission, Vision, Values, and Goals was undertaken and each was updated to address the current and anticipated future environment WellLife will be facing. In addition, a comprehensive program portfolio evaluation that included anticipated rate reimbursement forecasts and alignment with fulfilling the Mission was completed. Any programs that did not both fulfill our Mission and provide opportunity to contribute to the financial stability of the agency were placed on a watch list for evaluation over the next year. Lastly, a SWOT analysis that evaluated both the internal and external environment was completed and considered in establishing the following areas of focus. Based on all of these reviews, the areas of primary focus for the next three years were determined and incorporated in the following goals. Our overarching goals are to:

Assess and Transform Programs

Behavioral health services are in demand now more than ever. WellLife Network will be dedicated to assessing outcomes of each program offering and transforming these outcomes through continuous quality improvements to best meet the needs of all those we serve.

Adapt and Evolve with Change

The ability to adapt and evolve has proved to be an essential element to address the needs of individuals and families we serve. WellLife Network will strive to enhance these elements through new initiatives that will strengthen all services as our environment changes.

Diversify Funding

Enhancing and expanding our base of supporters will be essential for our continued success in providing cutting edge services at WellLife Network. Using a creative, entrepreneurial approach, we will expand our outreach in many areas to grow the WellLife brand and expand our base of supporters.

Enhance and Streamline Infrastructure

Our infrastructure is the foundation of providing our team the opportunity to deliver the best services for the populations we help at WellLife Network. In an ongoing effort, we will examine all aspects of the infrastructure of WellLife and implement enhanced and streamlined processes that will best support the success of our team.

Invest in Our Workforce

The greatest asset we have is our workforce. Providing the best experience to every team member will ensure that all individuals and families served at WellLife Network receive the best care possible. Through a number of initiatives designed to support and engage our team, WellLife will be dedicated to investing in our workforce.

Strategic Planning Process

This strategic plan was developed with input from the WellLife Network Board of Directors, Strategic Planning Committee, Senior Management Team and representative staff, including a review of the WellLife Network 2018-2020 Strategic Plan. A range of sources pertaining to WellLife Network's internal agency operations and significant trends externally in the health and human services sector were considered in the plan's development.

WellLife Network utilizes this Strategic Plan to:

- Ensure that our priorities are clear and communicated internally and externally;
- Provide a framework that guides us in the proactive allocation of energy and resources towards our highest priorities;
- Provide a framework for screening new opportunities;
- Provide the benchmarks against which we regularly review the plan and make course corrections as appropriate.

To facilitate the implementation of this Strategic Plan, WellLife Network is undertaking the following activities:

- Disseminate the plan to WellLife Network management and staff, individuals, and external stakeholders as appropriate;
- Conduct regular ongoing review of progress of the plan by WellLife Network, Board of Directors, Executive and Management staff;
- Utilize the plan in our daily work as the framework for evaluating new opportunities and guiding the development of agency resource allocations.

Strengths, Opportunities and Challenges

Our planning process included an analysis of the internal and external environment surrounding WellLife Network. The implications of what was found provided the springboard for the strategic focus of the next three years. Building on our internal strengths, taking advantage of external

A Flexible, Strategically-Oriented Agency

opportunities and properly addressing the challenges and threats that were expected provided the direction of our priorities.

Plan Implementation

The key component to the successful implementation of our strategic plan will be in laying out a clear, measurable and attainable path forward. Our Plan Implementation Section provides milestone achievements that our team will use to measure our progress and assess our direction at our quarterly reviews. Milestones have been categorized by the goals that were established and listed in the beginning of this plan. Each milestone will continue after its initiation and grow and expand as the milestone is achieved.

Financial Analysis

For each program type in our portfolio of services, examining both the contribution to furthering our mission and remaining fiscally viable are key components to the ultimate success of WellLife Network. The Financial Analysis section reviews the past three years financial results and examines the status of each of our program areas to the overall success of our organization.

Strengths Opportunities & Challenges

A Flexible,
Strategically-Oriented
Agency

As an agency with a solid reputation for integrity, innovation, quality, diversity, infrastructure, financial stability and resources, WellLife Network is in a position of great strength as we plan for the future during this time of significant change within our sector. Major strengths include:

Reputation

A well established and successful history of providing health and human services programs for over 40 years, built upon a distinguished track record of significant achievements and partnerships with government, communities, businesses, foundations and individuals served.

Governance

Our Board of Directors includes highly regarded business and health and human services professional leaders who are actively involved in the oversight and guidance of the organization through a partnership between Board and the Executive Staff.

Leadership

WellLife Network executives are respected leaders in their respective fields, with some serving on professional or human services associations.

Corporate Culture

WellLife Network has an unwavering commitment to integrity, accountability, entrepreneurship, self-evaluation, historical perspective, flexibility, and dedication to the Agency's mission and organization.

Partnerships

WellLife Network places a high value on partnerships and this is reflected in our work through strong bonds with government, the business community, the nonprofit sector and affiliations with various IPA's and the communities in which we work.

Health & Human Services

Experience, Expertise and Breadth

WellLife Network has significant experience and expertise developing and delivering services to a wide range of populations and implementing new strategies to address emerging economic, health and social needs. Today, WellLife Network delivers services that meet the special needs of diverse populations and communities across the areas of health, disabilities, housing, addiction recovery, vocational training, youth and families. WellLife Network has the demonstrated capacity to launch, scale and operate high quality, effective health and human services programs.

Workforce

WellLife Network has a large, diverse and skilled workforce of 1,700 employees, volunteers and student interns that delivers high quality

Our Values

To our mission of assisting people to heal, recover and become more independent in the community, WellLife Network brings a core set of values — compassion and caring, combined with innovation, quality, integrity, charity, hope, efficiency, accountability, and transparency. These values drive us to create a person-centered, employee-centric environment that fosters diversity, equity and inclusion for our staff, the people we serve, and the communities in which they live.

Planning the Future Today



Strengths

continued

programs with integrity and effectiveness. Significant professional development opportunities are available to staff. WellLife Network also has a large and long-standing student internship program that includes partnerships with many universities and colleges in New York City and Long Island. We place more than 100 student interns in our programs and administrative departments across the agency. Our volunteer operations leverage the talents and skills of caring community participants.

Performance Measurement

WellLife Network has a strong commitment to measuring results and using data to drive decision-making in all aspects of our work. Our strong technology capacity supports our focus on performance measurement.

Infrastructure

WellLife Network places an extremely strong emphasis on our infrastructure — the HR, IT, finance, legal, facilities, purchasing, grants management, development, marketing, communications and other administrative functions that support our staff to do their best

work with individuals and families. Our infrastructure, which also draws upon the talents of specialty consultants, enables us to deliver efficient and effective health and human service solutions; gives us the capacity to quickly and efficiently launch and scale major programs and initiatives, and significantly contributes to our competitiveness with other health and human services organizations within the sector.

Technology

WellLife Network has a long track record of leveraging technology to improve and expand the delivery of cost effective and efficient health and human services.

Entrepreneurship

WellLife Network has historically developed new approaches and initiatives to deliver services to support this work and to promote systemic changes to advance the social service sector. In the past, WellLife Network has developed several social enterprise businesses, including a for-profit facility maintenance, consulting and pharmacy. While some of these enterprises are no longer in existence,

they provided sound lessons in developing social service enterprises.

Ability to Adapt Quickly

WellLife Network displayed this strength in tangible ways as the worldwide pandemic took hold in early 2020. With a large organization, broad array of services and vast geographic footprint, our ability to adapt to the needs of a societal shutdown, while still meeting the physical and mental health needs of the populations we serve were proven to be sound. Our workforce displayed their commitment to our mission and successfully transitioned to new ways of doing business. Our management teams displayed their resourcefulness in addressing gaps in services and supports as they developed.

Diversity in Programs, People Served and Workforce

WellLife Network has historically been an equal opportunity organization in every sense of the words. Being located in one of the most culturally diverse areas of the world, Queens, New York, we have the privilege of serving and employing a very diverse group of individuals and families. In addition, due to the significant growth and mergers through the over 40 years of our existence and the knowledge and foresight of the agency's past leadership, WellLife Network has a deep and diverse set of program offerings serving a large number of vulnerable populations.

Opportunities

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WellLife Network has identified several significant areas of opportunity based on the agency's capabilities for growth and external factors.

Increasing Atmosphere Supporting Mergers and Acquisitions

The financial pressure of decreasing reimbursement for behavioral health services coupled with the changes that have come from the pandemic has created an atmosphere for smaller agencies and those in financial peril to explore merger options available. WellLife Network is positioned to explore strategic expansion opportunities in this atmosphere and strategically expand its portfolio of services to meet the need of the people we serve.

Reduced Stigma for Mental Health Conditions

Rates of both perceived and personal stigma decreased over time from 64% to 46% and from 11% to 6%, respectively in the past year. Many factors have contributed to the growth of acceptance in the validity of treating each person comprehensively, both mind and body. This creates an opportunity to reach more individuals needing the services WellLife Network offers as well as grow the support for the services that are offered from the community at large.

Merger Between the New York Office of Mental Health (OMH) and Office of Addiction Services and Supports (OASAS)

The Governor's 2022 executive budget proposal includes language that would, if enacted as written, create a new Office of Addiction and Mental Health Services (OAMHS). It is anticipated, if successfully executed, that the result will provide a better and more integrated, streamlined approach to care for those we serve,

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and a cohesive service delivery system with which providers can operate more efficiently and offer the highest quality of care at all times. This opportunity will eliminate duplication of reporting requirements and oversight for WellLife Network and allow our teams to focus on the care of those we serve.

Increasing Acceptance in Telehealth Modality

At the onset of the global pandemic, it immediately became apparent that there was a need to provide services in a modality that would eliminate the need for travel and face-to-face exposure. These needs catapulted Telehealth visits as a viable modality for behavioral health visits. Resistance to this modality was strong prior to this forced implementation, and it was soon shown that this was a modality that held much promise and success in reaching those in need. WellLife Network has actively been applying for permanent licensure in this modality with the new options being offered from the State of New York regulatory updates.

Increasing Need for Services

Facing a global pandemic has brought an unprecedented level of societal pressures and anxieties. Added to that, civil unrest related to the systemic racism and lack of inclusionary practices in many areas of society, we are now facing a new pandemic of need for behavior health services. The rates of substance abuse, suicide, domestic violence and crime are climbing. With this need, there has been additional funding and requests for proposals on expansion of services throughout our catchment area. WellLife Network is responding to the expanded needs and evaluating requests as they are published. We also continue to develop strategic alliances with other organizations to meet this growing demand.

Integrated Licenses and Off-Site Services

The State of New York continues to encourage behavioral health organizations to integrate their care by providing enhanced licensure. With the opportunity to expand our clinical services to include integrated care that would cover medical, behavioral and substance disorders, WellLife Network began to co-locate services with other providers in some of key Suffolk County locations in the past three years. As we look ahead, our organization will pursue a further integration by obtaining our own licensure to allow these services to take place within our existing clinical locations as we expand our program offerings to include an Article 31 Mental Health Clinic.

Opportunities

continued

A Flexible Strategically-Oriented Agency

Increased Funding for Opioid and Substance Use Disorders

State Opioid Response Grants have continued to grow with over \$1.3 million in grants funded in 2018, and an additional \$1.42 million funded in 2019 and 2020. Before the pandemic began, drug overdose mortalities were already reaching record highs. Experts have warned the pandemic is likely to exacerbate the opioid epidemic with added concerns centered on the economic disruption, social isolation and challenges to access to treatment. WellLife Network is exploring opportunities to enhance the services we currently offer as new funding streams emerge.

Opportunities for Innovation in Mental Health

Although mental health has not received as much attention, or funding, from the Federal government as substance use disorders in the past year, there is reason to believe that Congress will make a concerted effort to improve mental health care quality and access. Indicators of progress include:

- The Interdepartmental Serious Mental Illness Coordinating Committee has called on Federal agencies to implement a series of initiatives to improve care for serious mental illness and serious emotional disturbance by December 2022. Initiatives include: expanding access to telehealth; early identification and intervention

for children and young adults; making housing more readily available, and diverting individuals away from the justice system.

- SAMHSA (Substance Abuse and Mental Health Services Administration) recently announced the establishment of the National Mental Health and Substance Use Policy Laboratory to promote the innovation of new mental health and substance use practices and delivery models. Over the next few years, WellLife Network may wish to take advantage of opportunities to participate in initiatives and pilots that test innovative models of care, VBP methodologies, and telehealth technologies for mental health.

Challenges

Factors and Trends which Impact the Plan

Challenges represent any weaknesses detected within our organization and a variety of external factors that can contribute to barriers in fulfilling our mission. WellLife Network considered a number of significant factors and trends within health and human services delivery, government, the nonprofit sector and the private sector in the development of this strategic plan. Key challenges considered in our planning process include:

The Economy

The global pandemic has created a number of challenges for individuals and the US economy as a whole. The State of New York is reporting potential budget shortfalls that could impact funding for WellLife Network in the upcoming years. With additional funding and support from the Biden administration, we are optimistic that challenges from the economy will not create a sustained barrier as our plan progresses.

Rapidly Changing Health Care

Delivery Systems Healthcare delivery systems and expectations are changing. With national health care reform, New York State Medicaid and Medicare redesign initiatives and other trends, mental health, intellectual/developmental disabilities and long-term care services are moving to new models (value-based) of care, payment, risk-sharing partnerships. These will result in changing rules that impact the cost of service delivery, accountability and administration. Many funding sources provide minimal or no funding to support these activities.

Lack of Adequate Support for Infrastructure

There is limited private and governmental support for necessary technology infrastructure and other capacity building supports for nonprofits.

Expansion of Board

Key strategic decisions and support are provided by a diverse and well versed Board of Directors. WellLife Network has a key nucleus of board members to support the agency, but there is a need to expand the diversity and size of the group to promote the objectives of our strategic plan. The added pressures of the pandemic and strong competitive forces to find engaged and enthusiastic candidates create a challenge in this area of our strategic plan.

For-Profit Companies Entering the Nonprofit “Domain”

For-profit companies, backed by private equity are increasingly competing in what was formerly predominately the domain of nonprofits. Many are entering the Telehealth market to provide behavior health services such as *Talkspace*, *Verywell Mind* and *Betterhelp*. WellLife Network typically serves a patient mix that would not traditionally utilize these services because they do not take Medicaid reimbursement. We will continue to monitor these developments to determine if they can provide opportunities for the populations we serve without depleting our market share.

Our Impact

WellLife Network maintains high standards of quality assurance through an extensive tracking system. These quality assurance practices confirm that we allocate resources in the most cost-effective manner, that we track overall progress, discover trends and measure relationships between treatments, keep appropriate demographic information and do the best job possible of assuring that each individual receives the services that provide the best outcomes.

A hand is shown in the upper right corner, carefully placing a dark, smooth stone onto a stack of five other stones. The stones are of various colors and textures, including dark grey, brown, and reddish-brown, and are balanced precariously on top of each other. The background is a soft, out-of-focus landscape with a blue sky and a body of water, suggesting a serene, natural setting. The overall mood is one of balance, stability, and thoughtful action.

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To request a complete copy of the WellLife Network Strategic Plan write to:

WellLife Network Communications Department
Attn: Strategic Plan Request
142-02 20th Avenue, 3rd fl.
Flushing, NY 11351

Please include your full name, address, telephone number and email.

