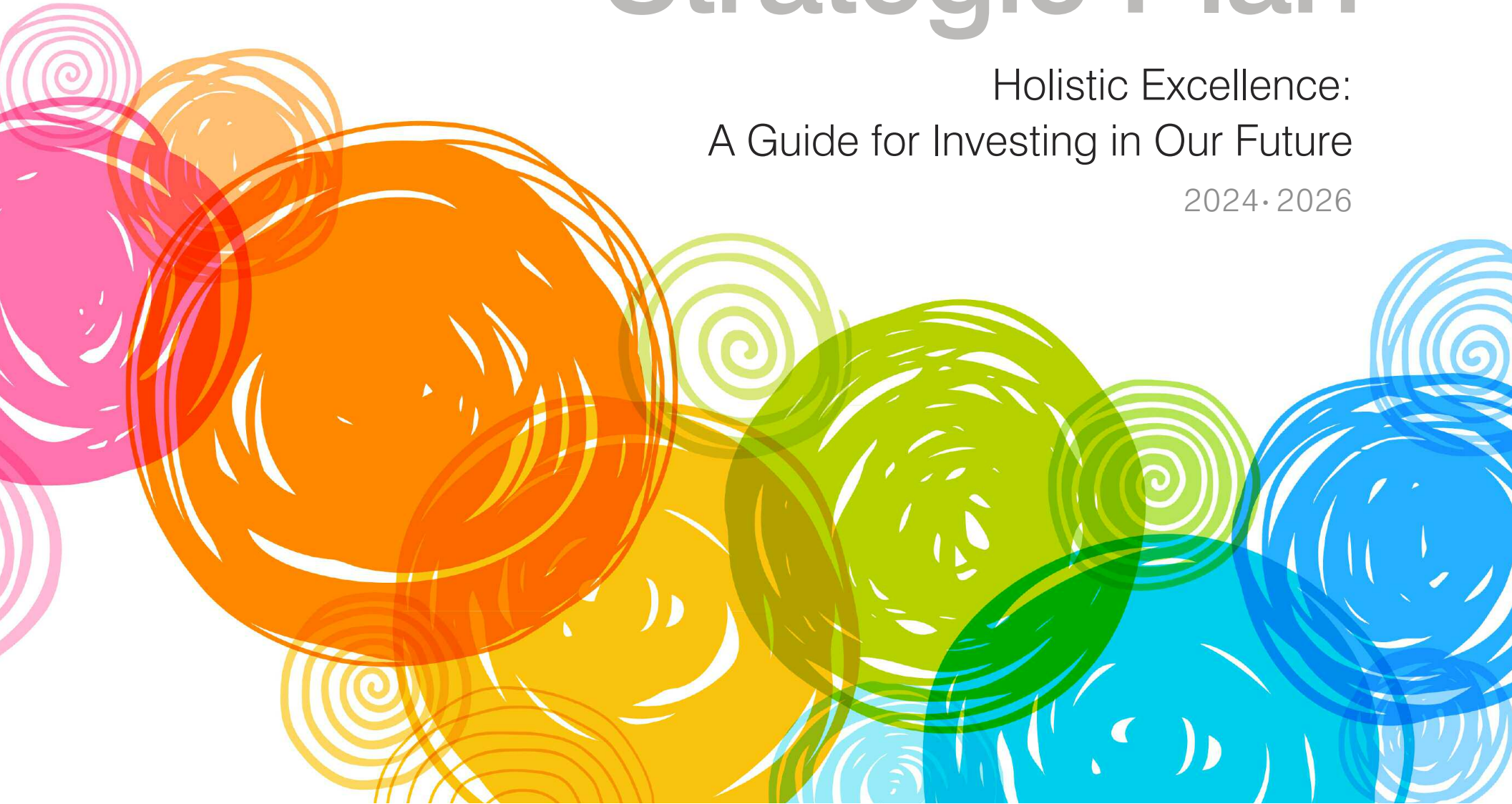



# Strategic Plan

Holistic Excellence:  
A Guide for Investing in Our Future

2024-2026





## Holistic Excellence: A Guide for Investing in Our Future

Welcome to the dawn of a transformative era for WellLife Network. Our three-year strategic plan, **"Holistic Excellence: A Guide for Investing in Our Future,"** represents our commitment to an innovative approach that promises to redefine the way we serve our community.

The strategic plan of WellLife Network will focus on investing our time, talent, and dollars toward holistic excellence throughout the organization. Holistic excellence involves addressing financial success, employee well-being, environmental sustainability, social responsibility, and ethical conduct. In our plan, excellence isn't solely measured by traditional

metrics like profit or productivity but also by the positive impact WellLife can achieve on individuals, communities, and the environment.

Holistic excellence reflects a more balanced and sustainable approach to achieving goals and success. Key components of the plan include goals to enlighten our team, residents, and participants to new perspectives that will provide opportunities for continued digital transformation, enhancing operational resilience, investment in our workforce, continuous quality improvement, growth in our services, and the well-being for those served, including our team members.

## Join Us

**Investing in our Future** is a plan designed to guide our organization as we embed this holistic philosophy into every aspect of our work, from program design to service delivery. We believe this strategy will enable us to better meet the evolving needs of our community and set a new standard for excellence in the health and human services sector.

**We invite you to join us on this exciting journey as we invest in our future and strive for holistic excellence.**







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WellLife Network is akin to the complex and biologically diverse coral reef ecosystems. Just as a coral reef provides a habitat for a myriad of fish, invertebrates, and algae, health and human services provide a robust infrastructure that caters to the needs of countless individuals, families, and communities. WellLife, much like a reef, constitutes a network of interacting entities — from medical professionals to social workers — who are responsible for the overall health and functioning of the societal ecosystem.





## Our Mission

At WellLife Network our mission is to foster an environment where individuals, families, and team members have the tools and support they need to thrive and live a well life.



# Building a Better Tomorrow

## Our History

### A Premier Provider of Health & Human Services

For four decades, WellLife Network has transformed and expanded its cadre of services to an ever widening network of the most vulnerable in our society. WellLife remains true to its mission of meeting the diverse needs of New York communities, business, and society by providing the tools and support, to those we serve and employ, to thrive and live a well life.

#### Partnerships Make it Happen

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.

#### Expanding to Meet Community Needs

Since its founding, WellLife'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 were set in place to serve 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's annual operating budget has experienced significant growth from its beginnings in 1980 of \$230,000 to a budget of over \$130 million today. With a workforce of more than 1,500 team members, interns and volunteers, WellLife delivers critical services in the areas of behavioral health, intellectual/developmental disabilities, housing, substance use disorders, vocational training, and care coordination. 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.

# Our History

## An Adaptable, Strategic, and Financially Stable 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 "*Innovating Transformation to Living a Well Life*" and its primary focus was on transformative innovation throughout the entire organization. Emphasis was placed on seeking opportunities for evolving and adapting to change, while emphasizing WellLife Network's core business of providing safe, secure, and nurturing housing opportunities for all populations we serve.

To enhance and support these experiences we also continued to strengthen our complementary community services, vocational,

and care management services as well as community outreach training and support. Based on this assessment and the increasing need in our service areas, a primary area of growth for our organization will continue to be affordable mixed-use housing. We are currently expanding our footprint in this area with two new developments that will add 136 units in the Bronx and 67 units on Long Island. Plans are also underway to develop additional sites located in Brooklyn and Manhattan.

### **The Lessons of COVID**

Emerging from the COVID 19 Pandemic provided new learning opportunities to refine our approach of working with a hybrid workforce, continuing to maintain safety in a world with the COVID 19 virus and

# Our History

## In-Sync with an Ever-changing Human Services Environment

understanding how to build a heavily fortified technology infrastructure to protect against the ever-growing cybersecurity challenges. These years also brought the "*Great Resignation*" leading to an increase in staff vacancies in all areas of our agency. Workforce shortage challenges will continue to be a focus in the coming years.

The ability to navigate the emergence period was bolstered by funds from the CARES Act, payroll deferral program, American Rescue Plan Act and Paycheck Protection Program, as well as the healthcare worker bonus program.

### **Major Changes to Mental Health Care**

With the passage of the fiscal year 2024 budget, the State of New York plans to

overhaul the State's continuum of mental health care. Governor Hochul announced a \$1 billion transformative plan which represents the state's largest investment in comprehensive mental health care since the 1970's.

This transformation will provide an opportunity for WellLife to continue to grow and enhance our existing programs and expand our outreach as well. The governor also included over \$7.7 million in the budget to support substance use disorder (SUD) workforce development at four medical schools across New York State as well as \$22 million in funds from the New York State Opioid Settlement Fund to support a range of SUD services.

Our strategic partnerships with various

Independent Practice Associations (IPAs) will play an important role with the pending release of the 1115 Waiver amendment proposal from the Centers for Medicare & Medicaid Services (CMS).

The 1115 Waiver has four overriding goals that center around building a better delivery system that reduces disparities, promotes health equity and delivers social care; developing supported housing and alternatives to institutional long-term care; health systems that are able to respond to pandemics and natural disasters, and creating statewide digital health and telehealth infrastructure.



## Our History

### Becoming a Provider of Choice

Our partnerships with the IPA groups will provide an opportunity for WellLife to be better positioned to participate in the new systems of care that will evolve from the proposed waiver plan when it is approved.

#### Preparing an Engaged Workforce

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 technology, we will focus our efforts on providing resources to our most important asset – our employees. Great outcomes are dependent on a well-trained and satisfied workforce.

We will establish a training curriculum, a mentoring program, and a forum for the team to understand all available resources through WellLife Network to ensure that those we serve are receiving the best possible experience.

#### A Commitment to Diversity

WellLife Network is committed to promoting equality, diversity, inclusiveness, and belonging (DEIB) in all client services and in all aspects of workforce recruitment and retention.

Providing improved access to language services, continued education to our team and the community about DEIB initiatives, and partnerships with our oversight agencies to implement important training related to

DEIB will continue to allow WellLife Network to be a leader in this area.

#### A Commitment to Becoming the Provider of Choice

WellLife Network is committed to becoming the provider of choice, known for high-quality, outcome-driven, and life-changing services. We help people achieve their health and life goals.

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 envisions a future where mental, emotional, and physical wellbeing are universal rights celebrated by all people equitably, regardless of ability.

Through this vision, WellLife Network will increase its scale and capabilities to thrive and grow in a changing health care environment.



# Planning the Future Today

# Goals

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 updated to address the current and anticipated future environment WellLife will be facing. An in-depth 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 an 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.



# Innovative & Integrated

## Goals

### High-Quality Services and Support that Address Current Challenges

Based on all of these reviews, the areas of primary focus for the next three years were determined and incorporated in the following goals:

#### Focus on Digital Transformation

Achieving increased efficiency, enhancing data management and improving service delivery will be our focus in this area. Our goals will include examining our technology stack, enhancing our data management and user experience, while implementing robust security measures to protect sensitive information.

#### Enhance Operational Resilience

Safety and preparedness will be our priority in this area, requiring a proactive and dynamic approach to changing risks and challenges.

Robust review of our potential risks and threats is an ongoing process. We will review incident response plans, business continuity plans, and disaster recovery plans in addition to educating our staff and clients.

#### 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 that WellLife serves will receive the best care possible. WellLife will invest in our workforce by engaging and supporting our teams with innovative initiatives.

#### Emphasize Agency Excellence & Growth

Essential for WellLife's long-term success, we will focus on emphasizing CQI initiatives in

training, mentoring and program development. We will capitalize on funding enhancements from NYS by growing our housing continuum of care, vocational programs, and community support programs. We will continue to enhance our development through grant and foundation funding.

#### Prioritize Wellbeing

Prioritizing wellbeing of our team and clients will create a positive and impactful environment. We will focus on person-centered planning, safety and security, community engagement, and work-life balance education. Developing a collaborative culture, with a focus on health and wellness programs, will enable WellLife to lower stress and burnout for our team and the clients we serve.



# Strategic Planning Process

This strategic plan was developed with input from the WellLife Network Board of Directors, Strategic Planning Committee, Executive Team, and representative staff through a number of town hall discussions.

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.



## We Listened and Responded

# Strategic Planning Process

## Adaptable Strategic Agency

### WellLiWellLife Network Uses 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.

#### Facilitating the Strategic Plan

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 Team and 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 & Challenges

Our planning process included an analysis of the internal and external environment surrounding WellLife Network. This analysis provided the springboard for the strategic focus of the next three years. We will build on our internal strengths, take advantage of external opportunities, and address the challenges and threats that are expected to drive our priorities in this plan.

#### Plan Implementation

The key component to the successful implementation of our strategic plan is a clear, measurable, and attainable roadmap. 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.





# The Strategic Planning Process

## Strengths, Opportunities, & Challenges

### 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. By comparing and contrasting the financial results of each year, we can identify trends and patterns that provide invaluable insights into the financial health and trajectory of our organization.

The analysis further delves into the operating margin and operating profit of each program. These financial metrics are crucial in understanding the profitability and efficiency of our operations.

In addition, we scrutinize our expenses to identify areas of cost savings and efficiencies. This involves a rigorous review of all expenditures, from overhead costs to direct program expenses.

Our financial analysis also includes a future volume and reimbursement outlook. By projecting future volumes and reimbursements, we can anticipate

potential challenges and opportunities that may impact our financial performance.

We also evaluate the unique value each program brings in order to succeed in the new environment.

Finally, based on the comprehensive analysis, an overall recommendation is provided. This recommendation may range from maintaining the status quo to carefully watching the program for a year. This recommendation is always grounded in data and is driven by our commitment to the fiscal viability and mission advancement of WellLife Network.



# Strengths of Our Agency

## Ensuring Successful Outcomes

### 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 the Board and the Executive Team.

### Leadership

WellLife Network executives are respected

leaders in their respective fields. Some serve 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 mental 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.





# Strengths of Our Agency

## Ensuring Successful Outcomes

### **Workforce**

WellLife Network has a large, diverse, and skilled workforce of 1,500 employees, volunteers, and student interns, delivering high-quality 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 colleges and universities in New York City and Long Island. We place over 100 student interns across the agency's programs and administrative departments. 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 technological 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, DEIB 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.



# Strengths of Our Agency

## Ensuring Successful Outcomes

### **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 organization.

### **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.

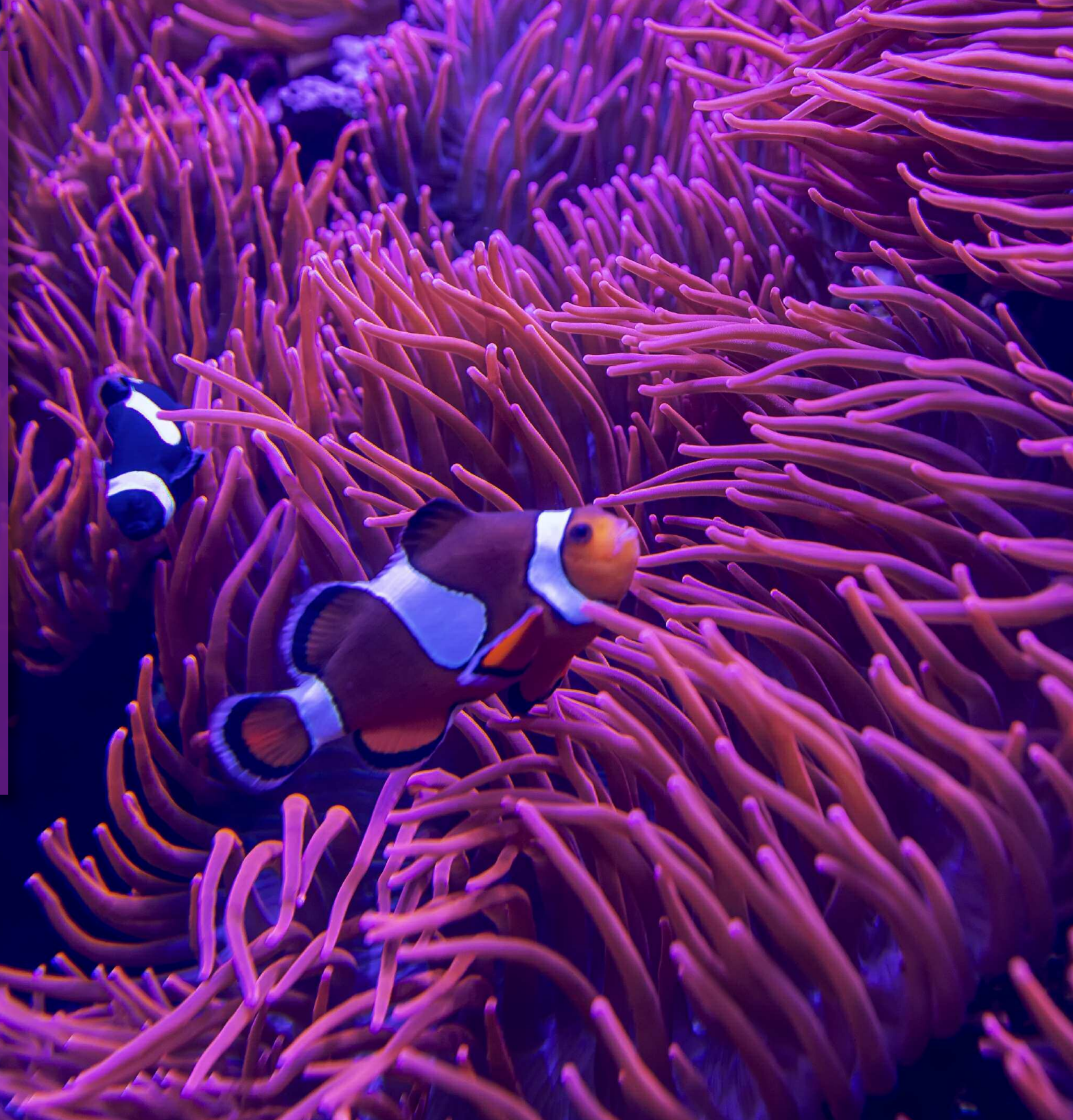
### **Diversity in Programs, People Served, and Workforce**

WellLife Network has historically been an equal-opportunity organization in every sense. Being located in one of the most culturally diverse regions of the world, New York, we have the privilege of serving and employing

a very divergent 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 many vulnerable populations.



**B**iodiversity strengthens coral reefs much like diversity empowers WellLife Network. A variety of species in a reef ensures its resilience, each contributing unique roles to the ecosystem's overall health. Similarly, WellLife's diverse staff and participants enhance its functionality. The organization's inclusivity sparks creativity and innovation, WellLife's commitment to diversity, fosters cultural competency, promoting understanding and respect for diverse perspectives. In nature and at WellLife Network, diversity plays a critical role in ensuring proficiency and robustness.



## Our Values

WellLife Network brings a core set of values that embody our name.

**B** **Believe** in treating everyone with the utmost respect and dignity, recognizing their unique needs and preferences.

**E** **Empathize** with others, actively listening and showing compassion in every interaction, whether with persons served, colleagues, or family members.

**W** **Work** diligently to maintain the highest standards of honesty and transparency in all dealings, ensuring trust and confidence.

**E** **Encourage** a positive and nurturing environment where every individual feels cared for, valued, seen, and heard.

**L** **Live** by ethical principles guided by our mission, consistently upholding our vision and goals.

**L** **Love** what we do, approaching our work with passion and dedication, always placing first the needs and wellbeing of those we serve.



## Be Well - Our Name Says It All





# Opportunities

## A Premier Provider of Health & Human Services

### Areas of Opportunity

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 emerged 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

More people feel comfortable talking to someone about their mental illness (66% to 71%). 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.

### Collaboration between New York Office of Mental Health (OMH) and Office of Addiction Services and Supports (OASAS)

The need for an improved process to integrate services for individuals with both mental health and substance use disorders is needed. OMH and OASAS recognize this and are developing new standards for a unified licensing option. This option will enable better service options for our clients and provide a cohesive service delivery system allowing providers to 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.



# Opportunities

## A Premier Provider of Health & Human Services

### 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 obtained permanent licensure in this modality and continues to explore expanded usage to improve services.

### Increasing Need for Services

The aftermath of a global pandemic has brought unprecedented societal pressures and anxieties. Added to that, civil unrest throughout the world, we are now facing a new pandemic of need for behavioral health services. The rates of substance abuse, suicide, domestic violence, and crime are climbing. With this need, there have been additional funding and requests for proposals on expanding 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.

### Certified Community Behavioral Health Clinic (CCBHC) Expansion

CCBHCs are a vehicle for expanded access to intensive community-based services for individuals with untreated serious mental illness and substance use disorders. The State of New York continues to explore expanding their current demonstration project in early 2024 by tripling the number of CCBHCs from 13 to 39. WellLife Network has been awarded two federally funded CCBHCs through SAMHSA and will continue to evaluate the NYS opportunities.



# Opportunities

## A Premier Provider of Health & Human Services

### Increased Funding Housing SUD and Mental Health Services

Governor Hochul has allocated \$1 billion dollars of the NYS budget toward the mental health system to increase housing and services for New Yorkers in need. She has also announced \$192 million for funding Opioid Use Disorder programs to serve New Yorkers struggling with addiction issues from the first-year opioid settlement funds. The state continues to roll out requests for proposals in these areas on a regular basis. WellLife Network is exploring opportunities to enhance the services we currently offer as new funding streams emerge.

### Opportunities for Innovation Utilizing Artificial Intelligence (AI)

Leveraging AI to enhance impact, streamline operations and improve the efficiency of our programs and services are the overarching opportunities available in this growing area of interest. Specifically, WellLife will explore utilizing this technology in these areas:

- Donor and fundraising optimization
- Grant and proposal writing
- Data analysis and insights
- Program impact assessments
- Predictive maintenance
- Social media and marketing
- Language translation and accessibility
- Fraud detection and prevention
- Education and skills development
- Content Creation

When implementing AI, WellLife will consider factors such as data privacy, ethics and

potential biases. We will use our partnerships with technology-based companies to provide support and guidance for best practices in this process.

### Expansion of Services to Other States

With the demand for housing and behavioral health services growing across the nation, WellLife will begin to explore diversifying risk by growing our program base in other states. The opportunities of doing this are providing an increased impact, expanding new donor and funding opportunities, scaling successful programs, networking and collaboration, improved reputation and recognition, and attracting top talent. Evaluation of available capacity and infrastructure will take place prior to initiation of this type of expansion.

# Challenges

## Factors and Trends that 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 emergence from the global pandemic has created a number of challenges for individuals and the US economy as a whole. A potential recession and rising interest rates

are creating uncertainty in funding if NYS budget has shortfalls. Political turmoil will also potentially impact the federal level of funding and continued focus on social service improvements throughout the nation.

### Rapidly Changing Health Care Delivery Systems

Healthcare delivery systems and expectations are changing. With national healthcare 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.

### Expansion of the 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 strong competitive forces to find engaged and enthusiastic candidates create a challenge in this area of our strategic plan.





# Challenges

## Factors and Trends that Impact the Plan

### **Lack of Adequate Support for Infrastructure**

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

### **Workforce Shortage**

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 behavioral health services such as *Talkspace*, *Verywell Mind*, and *Betterhelp*. This expansion of virtual services has created a lucrative and remote option for our clinical workforce. The telehealth options

have also created opportunities for low-cost private practice business that has drained the nonprofit workforce as well. The high cost of living in the NYC and Long Island areas have also created a drain on our workforce supply as more people are leaving the northeast for more affordable living in other states.

### **Growing Complexity of the Individuals We Serve**

Continuity of care is an important aspect of the service we provide to individuals. With the aging of our Intellectual/developmentally disabled population, we are facing an increasingly complex level of care that is not supported by the current rate structures.

There is also an emergence of dually diagnosed individuals who bring a challenging set of issues when trying to integrate these individuals into our programs.

The current opioid epidemic has created additional challenges in approaching the support needed for those being served in our mental health and substance use programs.

### **Managed Care Transition for Children on Medicaid**

Our Family and Children's Services Division faces continual transition in its rate structure and program offerings. This increase has been evident for the past two years and has a profound effect on WellLife's programming.

# Challenges

## Factors and Trends that Impact the Plan

These changes have challenged the fiscal viability of the Family and Children's Services Division and placed a severe strain on the workforce to meet high productivity standards in order to cover their program expenses. We continue to monitor this situation to assess the environment and WellLife's ability to serve this population.

### **Decreases in Federal Funding for New York State**

Medicaid spending for the State of New York has always been the highest in the nation. This has created pressure on the State to redesign their Medicaid programs and establish new rate structures to decrease the disparity with other states.

The submission of the 1115 Waiver Proposal includes redesign elements for programs that could lead to new rate structures for some of our programs.

### **Lack of Rate Increase in I/DD Programs**

OPWDD suspended their rate rationalization cost structure prior to the pandemic and has not updated rates since that time except for some minor cost-of-living adjustments for the support staff. This issue has placed a significant financial strain on this division.

There has been increasing pressure from advocacy groups to shift to a managed Medicaid program for this area.

WellLife continues to closely monitor these changes and search for cost-cutting measures to ameliorate the shortfalls where possible.



# Our Impact

WellLife Network maintains high standards of quality assurance through an extensive tracking system.

These quality assurance practices confirm that we allocate resources most cost-effectively, track overall progress, discover trends, and measure relationships between treatments, keep appropriate demographic information, and do the best job of ensuring that each individual receives the services that provide the best outcomes.



## The Best Outcomes

WellLife Network can be likened to a coral reef, teeming with diversity and life. We provide our clients with the sustenance they need to thrive, much like a reef does for its inhabitants. Our network offers endless opportunities for growth and achievement, mirroring the constant evolution within a reef. We cultivate a sense of belonging and family, akin to the harmony found within a reef colony, while promoting greater independence at home and in the community.

... with endless possibilities





# Plan Implementation

## Focus on Digital Transformation

WellLife Network will be dedicated to assessing the use and full implementation of technology for each program in order to best meet the needs of all those we serve.

Next Steps include the implementation of this plan. A timeline of goals for achieving each of the objectives will be developed.

Once the plan begins implementation and goal setting responsibilities assigned, an evaluation for monitoring milestones and completion of objectives must be ongoing and reported to the WellLife Network stakeholders: Board, Executives, and Management Staff.

Duration	Initiatives
<p>Up to 1 year</p> <p><b>1</b></p>	<ul style="list-style-type: none"> <li>• Move to NX platform</li> <li>• Complete IRA Clinical in PrecisionCare</li> <li>• Complete website update</li> </ul>
<p>Up to 2 years</p> <p><b>2</b></p>	<ul style="list-style-type: none"> <li>• Complete EHR implementation</li> <li>• Establish data strategy for collecting, storing, and using data</li> <li>• Implement data analytics tools for informed decision making</li> </ul>
<p>Up to 3 years</p> <p><b>3</b></p>	<ul style="list-style-type: none"> <li>• Ensure a consistent, user-friendly interface for staff and clients</li> <li>• Redesign and implement functional Intranet</li> </ul>



# Plan Implementation

## Enhance Operational Resilience

WellLife Network will be dedicated to assessing the use and full implementation of technology for each program in order to best meet the needs of all those we serve.

Next Steps include the implementation of this plan. A timeline of goals for achieving each of the objectives will be developed.

Once the plan begins implementation and goal setting responsibilities assigned, an evaluation for monitoring milestones and completion of objectives must be ongoing and reported to the WellLife Network stakeholders: Board, Executives, and Management Staff.

Duration	Initiatives
<p>Up to 1 year</p> <p><b>1</b></p>	<ul style="list-style-type: none"> <li>• Complete agencywide Emergency Preparedness Plan (EPP)</li> <li>• Fully review and update policies and handbooks for all areas</li> <li>• Evaluate and update physical plant security</li> </ul>
<p>Up to 2 years</p> <p><b>2</b></p>	<ul style="list-style-type: none"> <li>• Evaluate and implement adaptive equipment plan</li> <li>• Assessment of computer network vulnerabilities and remediation of weaknesses</li> <li>• Establish tabletop exercises for EPP</li> </ul>
<p>Up to 3 years</p> <p><b>3</b></p>	<ul style="list-style-type: none"> <li>• Evaluate security for all locations through scenario testing</li> <li>• Complete Business Impact Analysis</li> <li>• Create a Business Continuity Plan for crisis situations</li> </ul>






# Plan Implementation

## Emphasize Agency Excellence & Growth

WellLife Network will be dedicated to assessing the use and full implementation of technology for each program in order to best meet the needs of all those we serve.

Next Steps include the implementation of this plan. A timeline of goals for achieving each of the objectives will be developed.

Once the plan begins implementation and goal setting responsibilities assigned, an evaluation for monitoring milestones and completion of objectives must be ongoing and reported to the WellLife Network stakeholders: Board, Executives, and Management Staff.

Duration	Initiatives
<p>Up to 1 year</p> <p><b>1</b></p>	<ul style="list-style-type: none"> <li>• Begin construction for WP<sup>1</sup> &amp; Medford<sup>2</sup></li> <li>• Establish cost per service analysis for clinical programs</li> <li>• Expand our Community Foundation and grant funding</li> </ul>
<p>Up to 2 years</p> <p><b>2</b></p>	<ul style="list-style-type: none"> <li>• Review and refine CQI<sup>3</sup> projects in training</li> <li>• Add additional LIHTC<sup>4</sup> location to pipeline</li> <li>• Expand vocational opportunities for I/DD clients</li> </ul>
<p>Up to 3 years</p> <p><b>3</b></p>	<ul style="list-style-type: none"> <li>• Lease up WP &amp; Medford apartments</li> <li>• Begin to establish new goals for the next strategic plan</li> </ul>

WP<sup>1</sup>- White Plains Road Low Income Housing in Wakefield, Bronx  
 Medford<sup>2</sup> - Medford Gardens, Low Income Housing in the Town of Brookhaven, LI  
 CQI<sup>3</sup> - Continuous Quality Improvement  
 LIHTC<sup>4</sup> - Low Income Housing Tax Credit




# Plan Implementation

## Prioritize Wellbeing of Clients and Team

WellLife Network will be dedicated to assessing the use and full implementation of technology for each program in order to best meet the needs of all those we serve.

Next Steps include the implementation of this plan. A timeline of goals for achieving each of the objectives will be developed.

Once the plan begins implementation and goal setting responsibilities assigned, an evaluation for monitoring milestones and completion of objectives must be ongoing and reported to the WellLife Network stakeholders: Board, Executives, and Management Staff.

Duration	Initiatives
<p>Up to 1 year</p> <p><b>1</b></p>	<ul style="list-style-type: none"> <li>• Develop standardized team meeting curriculum for all programs</li> <li>• Incorporate “Funterventions” in activity calendars for clients and team</li> <li>• Emphasize health &amp; wellness activities with agency events</li> </ul>
<p>Up to 2 years</p> <p><b>2</b></p>	<ul style="list-style-type: none"> <li>• Expand food pantry footprint into areas of need</li> <li>• Add guest speakers for DEIB events and grow cultural diversity days</li> <li>• Establish staff and client language classes</li> </ul>
<p>Up to 3 years</p> <p><b>3</b></p>	<ul style="list-style-type: none"> <li>• Expand educational opportunities for clients and team members</li> <li>• Establish feedback mechanisms for program improvements</li> </ul>





# Plan Implementation

## Invest in Our Workforce

WellLife Network will be dedicated to assessing the use and full implementation of technology for each program in order to best meet the needs of all those we serve.

Next Steps include the implementation of this plan. A timeline of goals for achieving each of the objectives will be developed.

Once the plan begins implementation and goal setting responsibilities assigned, an evaluation for monitoring milestones and completion of objectives must be ongoing and reported to the WellLife Network stakeholders: Board, Executives, and Management Staff.

Duration	Initiatives
<p>Up to 1 year</p> <p><b>1</b></p>	<ul style="list-style-type: none"> <li>• Establish measures for orientation and separation</li> <li>• Initiate benefit audit with Gallagher<sup>1</sup> and evaluate new options</li> <li>• Establish mentorship track with management-level staff</li> </ul>
<p>Up to 2 years</p> <p><b>2</b></p>	<ul style="list-style-type: none"> <li>• Establish and implement staff development curriculum</li> <li>• Establish and implement life skills information center (health, financial, housing)</li> <li>• Evaluate VHS<sup>2</sup> process and improve any deficits</li> </ul>
<p>Up to 3 years</p> <p><b>3</b></p>	<ul style="list-style-type: none"> <li>• Evaluate and improve mentorship program</li> <li>• Evaluate life skills information center and improve any deficits</li> <li>• Evaluate staff development curriculum and improve any deficits</li> </ul>

Gallagher<sup>1</sup> - Gallagher Insurance, Risk Management & Consulting  
 VHS<sup>2</sup> - Valued, Heard, and Seen Evaluation Tool

# Financial Analysis

## Trends, Areas of Growth, and Future Challenges

### The Process

The financial analysis process — consisting of planning, budgeting, forecasting, analysis, and reporting — presents a formidable challenge to many non-profits, regardless of size. Forecasting is a crucial component of financial performance management. It can contribute significantly to a non-profit's overall success or failure, especially during industry volatility, changing regulations, and funding payment delays.

### Creating Business Insight from Across the Agency

WellLife Network realizes that when planning is dynamic and based on input from across the agency, enormous opportunities to drive business insight are created. The chart on the next page reflects WellLife Network's major program revenue streams. It provides a three-year history of each area's revenue, number of service units provided, operating margin and profit, expenses and various criteria which denote feasibility for future viability and overall patient/bed/visit growth or decline.

This analysis is intended to promote collaboration and foster a more disciplined financial management culture. Such analysis helps WellLife Network senior management staff to:

- Consistently deliver timely, reliable plans and forecasts, along with contingency plans.
- Analyze situations where income deviates from plans and promptly take corrective action
- Fortify the links between strategic objectives and operational and financial plans.
- Improve communication and collaboration among all plan contributors.
- Enhance strategic decision-making, allowing administrators to quickly identify, analyze and forecast the impact of changes as they occur.



Strategic Criteria for Reviewing Business Lines	Historical Revenue Growth	Revenue per Patient/Bed/Visit	Expense (including Admin)	Expense per Patient/Bed/Visit	Operating Margin & Operating Profit	Admin included in Expense			
<b>Management Priority Programs</b>									
Budget Review Meetings Held on a Monthly Basis.			Active Analysis on Cost Saving Measures Ongoing.						
IRA									
2021	22,421,952	427	22,521,426	429	(99,474)	2,579,990			
2022	22,383,433	438	22,915,002	448	(531,569)	2,699,603			
2023	22,832,627	467	24,827,549	508	(1,994,923)	2,909,479			
ICF									
2021	21,506,445	533	21,542,260	534	(35,815)	2,533,404			
2022	21,889,120	546	22,679,562	565	(790,442)	2,675,732			
2023	22,323,669	579	24,116,451	599	(792,782)	2,873,965			
ACT									
2021	6,814,725	410	6,521,909	392	292,816	746,229			
2022	6,970,062	441	6,632,560	420	337,502	691,374			
2023	7,726,873	458	7,832,205	464	(105,332)	870,049			
ARS and MH Clinic									
2021	3,308,178	94	3,807,557	109	(499,379)	426,668			
2022	4,009,243	120	4,584,751	138	(575,508)	464,507			
2023	6,371,065	219	6,377,151	219	(6,086)	709,951			
<b>Revenue Development Programs</b>									
Budget Review meetings bi-monthly.			Monthly review by budget team to determine if frequency need to move to monthly.						
Community Habilitation & Family Support Svcs.									
2021	1,870,799	7	1,569,904	6	300,895	172,571			
2022	1,592,781	10	1,432,766	9	160,015	169,512			
2023	1,638,817	12	1,502,098	11	136,718	172,092			
Supported Housing									
2021	12,142,749	75	11,792,644	73	350,105	581,572			
2022	12,162,170	77	11,885,904	75	276,266	557,408			
2023	13,449,363	74	13,295,312	73	154,051	750,265			
Congregate Housing									
2021	16,719,406	137	17,272,621	142	(553,215)	1,472,048			
2022	18,874,413	159	17,251,693	145	1,622,720	1,366,356			
2023	20,670,894	174	19,954,143	168	716,751	1,787,909			
PROS									
2021	5,146,342	75	5,130,819	75	15,523	503,182			
2022	5,248,006	91	4,896,025	85	351,981	438,650			
2023	5,580,403	86	5,379,905	83	200,498	557,742			
Supported Employment									
2021	449,805	93	653,744	135	(203,939)	68,470			
2022	445,070	118	527,762	140	(82,692)	51,352			
2023	345,200	132	413,832	159	(68,632)	41,865			
<b>Monitor and Maintain Programs</b>									
Quarterly Budget Review Meetings									
Day Habilitation									
2021	6,792,165	161	6,266,394	149	525,771	719,670			
2022	7,769,692	162	7,940,474	166	(170,782)	915,105			
2023	8,643,920	174	8,081,088	163	562,832	961,629			
Children and Family Services									
2021	4,529,432	191	4,608,028	194	(78,596)	547,129			
2022	4,142,939	209	4,396,854	222	(253,915)	475,905			
2023	5,029,962	273	4,613,258	251	416,703	543,445			
Care Coordination									
2021	6,355,969	598	5,781,343	544	574,626	677,833			
2022	6,259,412	820	5,309,102	696	950,310	568,839			
2023	6,431,409	939	5,379,257	785	1,052,152	631,650			
Adult CORE and other MH									
2021	1,671,266	134	1,819,292	146	(148,026)	218,198			
2022	1,305,128	165	1,516,297	192	(211,169)	172,379			
2023	1,509,283	195	1,476,203	190	33,081	176,428			

Future Volume & Reimbursement Outlook	WeillLife Operating and Management Abilities and Fit with Competencies	Long-Term Reimbursement/ Medicaid Managed Care Outlook	Level of Necessary Model Change for Service Delivery	Unique Value Add to be Able to Succeed in New Environment	Overall Recommendation
<b>Management Priority Programs</b>					
Budget Review Meetings Held on a Monthly Basis.		Active Analysis on Cost Saving Measures Ongoing.			
Increase/Change	High	Managed Medicaid Expected	Cost Saving Initiatives and Additional Intake Support	Yes	Carrying a large portion of admin. support; continue to support line of business
New rates expected 7/1/24 COLA will be issued					
Increase/Change	High	Managed Medicaid Expected	Cost Saving Initiatives and Additional Intake Support	Yes	Carrying a large portion of admin. support; continue to support line of business
New rates expected 7/1/24 COLA will be issued					
Increase/Same	High	Stable High Priority for NYS	Workforce Shortage Issues Driving Wage Increases	Yes	Additional team deployed in FY2024. Workforce shortage issues creating challenges; salary levels increased to offset.
COLA will be issued					
Increase/Same	High	Possible Change to Rates	Workforce Shortage Issues Driving Wage Increases	Yes	Integrated licensure has been delayed by State; workforce shortage issues have been addressed by salary adjustments.
COLA will be issued. Additional funds from opioid settlement					
<b>Revenue Development Programs</b>					
Budget Review meetings bi-monthly.		Monthly review by budget team to determine if frequency need to move to monthly.			
Same/Same	High	Stable	Stable	Yes	Plans to grow this program as workforce issues allow.
COLA will be issued					
Increase/Same	High	Stable High priority for New York State	Stable	Yes	Program growth with LIHTC openings. Additional billing opportunities for SCN.
COLA will be issued					
Increase/Same	High	Stable	Stable	Yes	Additional growth with Apartment Treatment beds in Suffolk. Additional billing opportunities for SCN.
COLA will be issued					
Same/Variable	High	Stable	Stable	Yes	Monitor growth and focus on increasing census where available through outreach and SCN opportunities. CCBHC 24 funds are being utilized.
COLA will be issued					
Increase/Same	Medium	Stable	Workforce Shortage Issues Driving Wage Increases	Yes	This will be an area to expand for the SCN initiation; potential for new revenue streams with additional billing codes.
COLA will be issued					
<b>Monitor and Maintain Programs</b>					
Quarterly Budget Review Meetings					
Increase/Stable	High	Managed Medicaid Expected	Stable	Yes	Dayhab growth expected with reopening of LIC location and reimagining initiatives are maturing. Goal will be to explore pre-vocational program expansion.
COLA will be issued					
Increase/Stable	High	Stable High priority for New York State	Stable	Yes	Program has been undergoing transition by the State, which has benefitted the rate structure. CCBHC 24 funds are being utilized.
COLA will be issued					
Increase/Same	High	Stable	Stable	Yes	This will be an area to expand for the SCN initiation; potential for new revenue streams and additional billing codes.
COLA will be issued					
Stable/Declining	Medium	Unstable	Workforce Shortage Issues Driving Wage Increases	Program Effectiveness Not Proven	This program continues to face workforce shortage issues. Will review for additional billing opportunities with SCN.
COLA will be issued					



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—  
**Dianne Camelo**  
General Counsel  
Stopol & Camelo, LLP



### Executive Offices

1985 Marcus Avenue, Suite 100

New Hyde Park, NY 11042

TEL: 718.559.0516 [www.WellLifeNetwork.org](http://www.WellLifeNetwork.org)

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