



STRATEGIC AND OPERATING PLAN

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POLICY:

It is the policy of Relational Excellence, LLC to utilize an ongoing strategic planning process to produce decisions and actions that guide and shape the organization in determining the ongoing relevancy of its mission, establishing strategic goals consistent with our consensual mission, and identifying specific strategies to meet the established goals.

Relational Excellence, LLC Strategic Plan is the result of a structured and disciplined administrative process guided by the Relational Excellence, LLC that utilizes the input of persons who are representative of the organization's stakeholders. The Strategic Plan represents the course of our organization and will be modified annually to ensure that it evolves in a manner that is supportive of our financial, service delivery, and human resource stability and growth.

The Strategic Plan is a critical element of a comprehensive planning process within our organization. The components of organizational planning, and how they support the planning process are as follows:

1. **Strategic Plan:** The Strategic Plan represents the course our organization will take annually to meet the assessed external and internal environmental demands to support financial, service delivery, and human resource stability and growth.
2. **Ongoing Work Plans:** Ongoing work plans include goals, strategies, objectives, responsibilities, and timelines that are focused on specific areas of organizational functioning and typically contain short-term goals that can be met within a 12-month period. When goals on ongoing work plans require timelines that exceed one year, and/or require resources beyond the projected budgets of our organization, those goals may be noted simultaneously on our organizational strategic plan. Our organization's work plans are as follows:
 - a. Business Development Plan
 - b. Treatment Program Development Plan
 - c. Financial Plan
 - d. Customer Service Plan
 - e. Service Delivery & Development
 - f. Staffing
 - g. Community Awareness and Understanding
 - h. Workforce Development
 - i. Cultural Diversity and Competency Plan
 - j. Risk Management Plan
 - k. Performance Improvement Plan
3. **Social Determinants of Health:** Relational Excellence, LLC believes that partnerships are a crucial component of addressing the social needs of patients. Our organization will look to partner and collaborate with other behavioral health and other



healthcare providers that will work with us on addressing social determinants of health through five approaches—awareness, adjustment, assistance, alignment, and advocacy,

3. **Analysis Documents:** Analysis documents serve to assess, evaluate, and analyze the outcomes of organizational goals, actions, and processes, contained in organizational planning and performance improvement documents. The analysis documents represent processes that support the revision of strategic, work, and performance improvement plans. The organization’s analysis documents are as follows:

- a. Annual Performance Analysis of Business and Service Delivery Functions (includes analysis of Strategic Plan progress and outcomes)
- b. Accessibility Status Report
- c. Annual Review of Formal Complaints
- d. Annual Critical Incident Analysis
- e. Annual Review or Audit of Financial Records
- f. Quarterly Budget and Expense Reviews
- g. Stakeholder Input Analysis Reports
- h. Management Team Meeting Minutes

B. The process of developing, actualizing, reviewing, and revising the Strategic Plan is based on taking advantage of the organization’s strengths and opportunities while addressing our weaknesses and threats in the following areas:

1. The Expectations of the Persons Served
2. The Expectations of Other Stakeholders
3. The Competitive Environment
4. Financial Opportunities
5. Financial Threats
6. Organizational Capabilities
7. Service Delivery Needs
8. Community Demographics
9. Relationships with Stakeholders
10. The Regulatory Environment
11. The Legislative Environment
12. Workforce Development



PROCEDURE:

- A. Identification of Planning Participants: The participants and their key roles in Relational Excellence's strategic planning process are as follows:

Leadership Role: Advocates for the strategic planning process and supports individual roles and responsibilities of those involved in the process. Identifies the members of the planning group and encourages participation. Seeks and identifies facilitator of planning process. Reviews plan drafts and analyzes for final approval. Responsible for final approval of plan and facilitates the communication of final plan within the organizational system. Has oversight of the monitoring and revision of plan, as needed, on an ongoing basis.



1. Planning Facilitator:

Office Manager will act as the Planning Facilitator for Relational Excellence, LLC.

Planning Facilitator Role: This designee provides direction and oversight in the strategic planning process and is ultimately responsible for the facilitation of the organization's strategic planning process in coordination with leadership.

2. Planning Group:

Planning Group Role: Directly involved in the planning process of assessing the issues the organization facilitating and developing ideas and options for the future.

3. Plan Writer: The Corporate Compliance Officer in conjunction with Relational Excellence, LLC Legal will be responsible for the writing the Strategic Plan based on meeting minutes, feedback from the leadership team as well as input from stakeholders.

Plan Writer Role: Assembles the planning group's process and resulting decisions into a functional document. Creates draft of the strategic plan based on notes of planning meetings.

4. Persons Served: Relational Excellence, LLC engages the opinion and feedback of Stakeholders and Relational Excellence, LLC employees for the purpose of adopting and fine-tuning a Strategic Plan. Relational Excellence, LLC reviews Resident Satisfaction Surveys, Employee Opinion Surveys, Review Critical Incident Reports and Referral Source Feedback Forms. The information obtained through these tools will be used to assist in the direction of the Strategic Plan.

Relational Excellence's strategic planning process is as follows:

1. Initiation of Planning Process:

- a. Relational Excellence, LLC identifies the following program development components and activities. There is a timeline that has been developed in order to ensure that these activities occur routinely and within the designated timeframe. A discussion amongst the Team occurs quarterly to discuss the areas related to Strategic Planning.

2. Completion Target Date:

The management team will determine a target date for completion of the planning process by identifying a date for a future meeting for adopting the plan.

3. Approval of Resources for Planning Process:

- a. Upon recommendation of the Relational Excellence, LLC the following components of the planning process are carried out:



- 1) Approval of outside strategic planning facilitator(s) and associated cost.
 - 2) Approval of site and logistical costs.
 - 3) Approval of offsite planning date(s) and the recommended participants.
 - 4) Approval of any miscellaneous costs (travel, lodging, per diem, training materials, food, etc.).
4. Meeting with Facilitator(s):
- a. Prior to the organizational planning sessions, the strategic planning facilitator(s) collaborate with the Relational Excellence, LLC and management team to provide an overview of the planning process and to assess the overall organizational needs. The session is focused on gathering and presenting information in the following areas:
 - 1) Current issues that the organization is facing.
 - 2) An overview of the planning process, by the facilitator(s)
 - 3) An assessment of any acute issues within organization's current operations.
 - 4) A discussion regarding the organization's expectations or expected outcome of the planning sessions.
5. Strategic Planning Process/Stakeholder Participation:
- a. Mission Statement Review: Relational Excellence, LLC consistently and periodically reviews the feedback obtained from staff members, stakeholders and residents. This feedback is used to develop and modify the program and the mission of Relational Excellence, LLC. Based on the feedback and assessed need from stakeholders, Relational Excellence, LLC ask itself: What are we? Who are we? What do we do? What are the basic social, political, environmental, financial issues or problems the organization exists to address? What is the social/community justification for the organization to exist? How does the organization recognize, anticipate, and respond to the identified needs and problems? The Mission Statement is assessed annually by the Relational Excellence, LLC in conjunction with the Management Team and will amend the Mission and Treatment Philosophy of Relational Excellence, LLC as appropriate.



- b. Financial Disposition and Review: Relational Excellence, LLC consistently and periodically evaluates the treatment facility's financial disposition to ensure that the treatment center effectively operates and continues to offer and expand its services to stakeholders. The areas that are addressed are:
- The Operating Budget
 - Staffing Costs
 - Facility Management Fees
 - Third Party Reimbursements
 - Assessment of Client Fees and Self Paying Protocols
 - Marketing and Business Development Costs
 - Legal Costs
- c. SWOT Analysis of Current Environment (Strengths, Weaknesses, Opportunities, Threats): The Management Team has designed a SWOT component and a brainstorming process of identifying (listing) current issues related to the specific SWOT area (For example: Strengths: Identification of organizational strengths). This data will be developed and generated by the Relational Excellence, LLC who will create this data based on the trends in the industry and feedback from clients, staff, constituents and competitors.
- d. Identification of Goals/Themes and Objectives/Actions: Facilitator(s), with support of the Relational Excellence, LLC and the Management Team, compile a list and overall set of goals and action oriented objectives, discuss these goals with the group, and clarify the overall results with the group, making adjustments based on consensus.
6. Writing, Reviewing, and Adopting the Plan:
- a. Writing a Draft of the Strategic Plan: The person responsible for writing the strategic plan assembles the information into a format that communicates the key areas the planning sessions identified and allows the organization to move forward with implementing the plan. The draft of the plan will include these elements:
- 1) Mission of the Organization
 - 2) The Organization's Mandates and Stakeholders
 - 3) Summary of the SWOT Analysis
 - 4) Strategic Issues, Goals, and Objectives
 - 5) Financial Considerations



- 6) Timeline for Reviews and Updates
- 7) Prioritizing the plan
 - a. Review and Revision of Mission: A representative group of participants in the strategic planning process, led by the facilitator(s), review the original mission statement, review the areas identified early that raised questions about the statement, review the planning themes, discuss linkages between the statement and planning themes, and identify possible areas of the statement that do not connect with the planning themes. Changes will be made by adding or deleting items from the mission statement and/or from the strategic issues. The process will continue until the mission statement accurately reflects the organization's current and future strategic goals.
 - b. Adopt the Plan: The representative group of persons who participated in the large planning process, along with the plan writer and the senior management of the organization, will meet and review drafts of the plan and make a final recommendation to present the plan to the Management Team for final approval. This plan will be monitored and prioritized based on the feedback that is received from stakeholders, employees and other entities associated with the development of the program. The Management Team will review this feedback and will approve any revisions made to the strategic plan.
7. Reviewing Plan Progress:
 - a. Progress Checks: The Management Team will review the plan's progress, and revise as needed, every three months.
8. Sharing the Plan:
 - a. An Annual Summary of the Strategic Plan is made available to Relational Excellence, LLC employees, stakeholders, referral sources upon written request to the Relational Excellence, LLC. Staff, clients, stakeholders are encouraged to make suggestions on how Relational Excellence, LLC may improve service delivery by offering suggestions for strategic planning.