



SAI Residential Treatment Center Strategic Plan

I. Policy

SAI RESIDENTIAL TREATMENT CENTER shall develop a strategic plan that will serve as a guideline for where the organization is beginning and where it strives to be in the future. In February 2022, the organization developed its mission, vision, and values statements.

Update 04/15/2024

Review 12/11/2024

Sai Residential Treatment Center shall continuously monitor and update a Strategic Plan that will serve as a guideline for programmatic goals and measurement standards.

II. Purpose

The Strategic Plan is designed as a systematic management tool for short-term (3-years) goals and objectives. It establishes a foundation for success through a planning process that focuses on taking advantage of SAI RESIDENTIAL TREATMENT CENTER strengths, opportunities and addressing identified weaknesses and threats.

III. Plan

Based on the processes used to develop the strategic plan several themes emerged that help formulate the focus of the organization. They included but were not limited to:

- Increasing management accountability
- Aligning the organization's processes with CARF
- Expanding and growing the organization through persons served enrollment
- Expanding the delivery of services
- Guarding against threats to the organization

Review of Financial Position:

February 2022:

- SAI RESIDENTIAL TREATMENT CENTER has private start-up funding from Goyal Psychiatry LLC to establish a foundation of treatment until client funding begins to bring in a profit.
- As a new organization SAI RESIDENTIAL TREATMENT CENTER's financial position is that of creating contracts and agreements with payor sources such as insurance companies.
- SAI RESIDENTIAL TREATMENT CENTER's financial solvency will depend on Insurance payments and cash pay from clients.
- SAI RESIDENTIAL TREATMENT CENTER will be diligent in collecting payment, co-payments and deductibles from clients.
- SAI RESIDENTIAL TREATMENT CENTER has a written financial policy, outlining all costs for the treatment at the facility.
 - This policy will be reviewed/updated annually
- SAI RESIDENTIAL TREATMENT CENTER recognizes that its future financial position is impacted by the competition, and ever-changing marketplace factors such as coding, payment, reimbursement, and costs.
- SAI RESIDENTIAL TREATMENT CENTER fiscal practices will adhere to established accounting principles and business practices.
- SAI RESIDENTIAL TREATMENT CENTER financial planning and management activities are designed to meet the established outcomes for the person served, and the organizational performance objectives.
- Management and financial activities will incorporate indicators in areas such as a) effectiveness and efficiency of services, b) service access, c) satisfaction and other feedback from persons served and other stakeholders as applicable.
- SAI RESIDENTIAL TREATMENT CENTER is better able to define success with proactive long-term financial planning measures.
- Financial plan will be reviewed on a yearly basis to review current practices and opportunities for growth in this area.
- It is the policy of SAI RESIDENTIAL TREATMENT CENTER to develop an annual budget that ensures resources are being appropriately allocated for the mission, goals, objectives, and to ensure outcomes for persons served are achieved.
- SAI RESIDENTIAL TREATMENT CENTER will conduct a monthly review of the actual financial results and compare these results to the budget.
- Monthly cash flow statements and Profit and Loss margins will be reviewed monthly by the CEO and Director of Operations.
- Monthly the CEO and Director of Operations will review the status report of the organization's financial position.

April 2024:

- SAI Residential Treatment Center has signed contracts with many private commercial insurance plans and is now gaining revenue through insurance payments and cash pay for patient services.
- Sai Residential Treatment Center has hired a Utilization Review Specialist to obtain insurance pre-approval on all referrals, ensuring accurate and timely payments. This employee is also responsible for collecting all patient copays and deductibles prior to admission.
- Sai Residential has a contract with an outside billing company for all RTC billing



Environmental Scan

The following is SAI RESIDENTIAL TREATMENT CENTER's key strengths, weaknesses, opportunities, and threats:

SWOT Analysis

Strengths:

- Established network and community contacts as a result of long-time work in Northern Nevada behavioral health field.
- Support and direction from CARF Consultants and team.
- Committed and educated management team
 - Laci Lorenzo, LCSW – Clinical Director
 - Danielle Peterson – Program Manager
 - Jeanette Bussey, LMFT – Chief Executive Officer
 - Sarah Wheeler, RN – Nursing Manager
 - Amy Roman-Bello – MHT Lead
- Limited adolescent residential treatment centers in the areas = high need for the services.
- Client driven services
- Exemplary level of service
 - Education program
 - Variety of patient programming – yoga, music, (groups)
 - Engagement with community partners
 - Active case management
 - Family support services
 - Safe neighborhood

Weaknesses:

- SAI RESIDENTIAL TREATMENT CENTER is a new company – under a year providing services
- Limited public knowledge of services at this point
- Staffing
 - Retention
 - Staff training

Opportunities:

- Network with community stakeholders
- Extend services to target population
- Develop trust and support in the community
- Recruit and maintain committed qualified staff
- Become financially solvent - continue
- Opportunity to provide services to a vulnerable population in our community
- Receive a CARF Preliminary accreditation – Completed (1 year)
- Receive 3-year CARF accreditation
- Acquire funding streams - Completed

Threats:

- Competition
- Lawsuits
- Recruiting under-qualified staff
- Change in funding streams
- Limited insurance reimbursement
- Negative client reviews

GOALS, ACTION PLANS and TIMELINES

Goal 1: Establishment of Client Services and Growth

Objective: To establish a program that serves clients and to grow the program over the following year.

Strategy: Form relationships with community partners, referral sources and professional contacts.

Tactics: 1. Implement an aggressive marketing strategy to educate stakeholders in our community about the services we will be providing.

2. Implement program and service delivery by June, 15, 2022

3. Enroll 30 persons served by January 1, 2023

4. Enroll 65 persons served by June 15, 2023

5. Enroll 125 persons served by January 1, 2024



PROGRESS UPDATE – SAI RESIDENTIAL TREATMENT CENTER BEGAN SERVING PATIENTS IN JULY 2023. YTD RESULTS:

- 51 patients have been enrolled
- Sai RTC has a referral relationship with Reno Behavioral Health
- Sai RTC is working with community partners to build collaborative partnerships
 - JTNN
 - Human Services Agency
 - Children's Cabinet
 - Washoe County Juvenile Services
 - PAWS for Therapy
 - Washoe County Library – Mobile unit
 - Mobile crisis response team
 - Family resource center
 - Nv Youth Employment Program
 - Sierra NV Job Corps
 - Washoe County School District Transition Coordination
 - Grace Church
 - NA/AA
- Sai RTC has held two Community Conversation meetings for stakeholders to inform and educate about our program and services

Goal 2: Achieve 1-year and 3-year CARF Accreditation

Objective: To pass preliminary survey, one-year and three-year accreditation

Tactics:

1. Complete necessary documentation
2. Maintain compliance with all standards
3. Achieve growth goals
4. Implement policies and procedures

PROGRESS UPDATE – Sai RTC has hired two new Leadership positions to oversee daily program operations: Coral Fantasia, LCSW – Clinical Director and Danielle Peterson – Program Manager. The Sai RTC Leadership team is working to ensure all CARF standards are met; all policies and procedures are being implemented and achieving program goals.

Progress update: December 11th 2024: Sai RTC has hired a new clinical director Laci Lorenzo, LCSW and a new Mental Health Tech lead Amy Roman-Bello.

Goal 3: Recruit and Maintain culturally competent staff

Objective: To fully staff programs and retain employees to provide quality services to all clients

Tactics:

1. Streamline onboarding by creating an orientation process – June 1, 2024 - **Completed**
2. Engage employees in employee appreciation program by: June 1, 2024 – Continue monthly - **Completed**
3. Foster a supportive work environment by distributing an employee satisfaction survey on a monthly basis in order to have open communication with leadership: May 31, 2024 - reviewed monthly by leadership - **Completed**
4. Implement changes or address common concerns based on employee satisfaction surveys – Monthly – **In Progress**
5. Develop and implement staff self-evaluations encouraging staff to reflect on their performance – May 31, 2024 - continued bi-annually – **In progress**
6. Continue employee performance evaluations and ensure they are completed on the: 90- days after hire, 6 months and annually. – **In progress**
7. Achieve an overall retention rate of 75 % of all staff hires by: December 31, 2024 – **In progress**
8. Performance Evaluations completed on time by: 90 days and 6 months after hire. Then annually moving forward. – **In progress**
9. All Employees will complete CARF Mandatory training upon hire with yearly updates and complete files directed by CARF, state, and federal standards by: Ongoing, as new staff are hired
10. All Employees will have completed files directed by CARF, state, and federal standards by June 15, 2024

Goal 4: Establish revenue generating programs - COMPLETED

Objective: Create programming that brings revenue to the organization

Tactics: 1. Serve 30 clients by January 1, 2023

2. Increase Insurance billing and improve overall productivity by June 15, 2023



3. Widely distribute brochures with information about our organization to all stakeholders and potential stakeholders by June 1, 2022
4. Increase programs/services by June 15, 2024
5. Become financially solvent through savings or establishing a line of credit that is equivalent to 6 months of expenses by: June 15, 2025
6. Establish business cards, website, marketing materials by: June 15, 2022

PROGRESS UPDATE – The RTC opened in July 2023. Since that time, 51 patients have been enrolled. Contracts are in place with many private commercial insurance companies for RTC services. Marketing efforts have included distribution of flyers and brochures, Community Conversations with stakeholders.

Goal 4: Increase revenue generating programs

Objective: Continue increasing programs and services at Sai RTC and obtain financial solvency through insurance payments

Tactics:

1. Obtain Insurance Contracts with State and Managed Medicaid programs by December 15, 2024
2. Continue marketing and community outreach to educate and inform stakeholders about Sai RTC programs and services in an effort to build collaborative relationships and referrals.
3. Become financially solvent with 90% of profits obtained through insurance reimbursements.

Goal 5: Maximize opportunities related to technological innovations supporting service delivery efficiency, effectiveness, and supporting the organization's business functions.

Objective: Continue utilizing an Electronic Medical Records program to facilitate efficient management of all client documents/services

- Tactics:
1. Continue to develop and Implement Technology Plan by: December 30, 2024
 2. Continue researching emerging technologies that will positively impact the efficiency of service delivery by: December 30, 2024
 3. Continue utilizing electronic medical records and billing system throughout the year.
 4. Complete training to employees on the confidentiality and security on computer equipment by: July 1, 2024 and ongoing annually
 5. Audit current programs and reports that collect and manage data to ensure effective and efficient services: Monthly, throughout the year.

Goal 6: Identify and reduce potential risks to SAI Residential Treatment Center

Objective: Continuously monitor and update Risk Management Plan for SAI Residential Treatment Center to prevent and reduce all risks.

- Tactics:
1. Amend safety protocols and implement emergency drills: June 2024 – **In progress**
 2. Continue Workplace Safety Training for staff: May 31, 2024 – ongoing
 3. Amend and clarify environmental checklists to increase safety protocols – May 31, 2024 - **Completed**
 4. Develop and implement injury observation reports for staff and clients to observe ongoing safety issues: May 31, 2024 – **In progress**
 5. Develop a Safety Leadership team to ensure everyone is complying with safety standards: April 2024 – **Completed and ongoing**
 6. Develop and implement building maintenance processes to ensure timely repairs and minimize on-site hazards - **Completed**
 7. Maintain and update Corporate Compliance Plan: annually – **In progress**
 8. QA Audits analyzed, trended and improve chart audit review performances quarterly by: Monthly – **In progress**

Goal 7: Maximize opportunities related to training staff in the most relevant and up to date mental health service delivery, effectiveness, and supporting the patient's ongoing mental health needs.

Objective: Continue ongoing training programs to facilitate updated education on mental health. To include but is not limited to PACES, Trauma Informed Care, verbal De-Escalation, Behavioral Health Management, and Crisis Interventions.

Tactics:

1. Continue to develop and Implement training plan by: May 1, 2024 and ongoing – **In progress**
2. Continue researching emerging treatment changes that will positively impact the efficiency of service delivery by: December 30, 2024 – **In progress**
3. Continue analyzing staff training needs throughout the year.
4. Promote workplace culture that emphasizes program efficiency feedback and training needs.
5. Implement community feedback regarding current programs and ensure effective and efficient services: Quarterly, throughout the year.



Goal 8: Increase community networking and engagement opportunities to collaborate community-based services for current and future clients. To implement community feedback regarding current programs and ensure effective and efficient services.

Objective: Continue ongoing engagement with community-based programs to facilitate education and other social support needs to current and future clients.

Tactics:

1. Continue to develop and community engagement plan by: June 15, 2024 and ongoing – **In progress**
2. Continue researching emerging community agencies that will positively impact the efficiency of service delivery and post-discharge stabilization with clients and their families by: Throughout the year. – **In Progress**
3. Continue working with local non-profits to bring client and family psychoeducation on a multitude of topics and community resources that are relevant and support to the client's needs. – **In Progress**
4. Continue working with local county library system for "Mobile Library" Services to increase client prosocial activity engagement. – **In Progress**
5. Continue working with local volunteering agencies such as AA/NA, Spiritual services, and Paws 4 Therapy to provide well-rounded, culturally competent mental health treatment.- **In Progress**
6. Implement community engagement plan which will allow the current and future clients to participate in activities outside of the residential treatment facility that are not limited by Sai Residential Treatment Center's transportation limitations.