



Bridgewell 2022-2025 Strategic Plan: FINAL

June 9, 2022

Presented to:



The Mission

“Bridgewell inspires hope and empowers people experiencing life challenges to achieve their fullest potential.”

Bridgewell



Disability Services



Recovery Services

**Behavioral Health
Services**

6,250+

People served annually,
including more than 580
people living in Bridgewell

**Homeless &
Housing Services**



**Center for
Professional
Development**



\$500,000

Average spent on staff
training and certification each
year

**Specialized
Services**

After further analysis, **three strategic imperatives¹** emerged from the 2022-2025 strategic planning workshop. There was an overwhelming orientation toward **becoming the employer of choice**.

1

To **become the employer of choice²** by finding and keeping the right people, providing with necessary resources, nurturing the Bridgewell culture, and developing our **people's skills, capabilities, and desire to deliver** our mission in a high quality, sustainable way

2

To **expand Bridgewell's needs-based services** which increases independence and quality of life for our clients, families, and communities

3

To **develop a sustainable, profitable funding model** that supports the forward-looking vision and mission

¹This is a refined set of goals from the initial set in the workshop.

²Given the current market dynamics and staffing shortage/retention issues, this goal is of the highest order because without accomplishing this goal, we will be limited in our ability to achieve any of the others.

The 2022-2025 Strategic Plan was developed in consideration of **six timely themes** which we have intentionally chosen to inform our strategies and ways of working on and which will ultimately ensure that **our goals, strategies, and focus are purposeful and relevant.**



WORKFORCE PLANNING

Align and develop our current and future workforce to help us achieve our mission and goals



DIVERSITY EQUITY AND INCLUSION

Reflect our values when we define and practice DEI at all levels



CULTURE AND VALUES (HARMONIZATION)

Allow us to leverage our collective strengths across our five organizations when we support each other and work collaboratively



PEOPLE, TALENT, AND SKILLS

Be the backbone of our future growth and success when optimizing retaining, training, and recruiting



FISCAL TRENDS AND SUSTAINABILITY

Allow us to help the most people when sourcing new and diverse funding and making sound financial decisions



TECHNOLOGY AND INFRASTRUCTURE

Support our teams and clients by providing the tools, technologies, and processes they need to be sustainably successful

There are six actionable and measurable strategies that, if executed well, set Bridgewell up for achieving their three goals over the next 36 months

1. **Retain and engage** talent by developing programs that will help people to grow and want to stay; engage teams with improved visibility, communications, and support to improve culture and collaboration
2. **Attract** talent with competitive compensation and improved hiring and onboarding
3. **Create** an environment that fosters Diversity, Equity and Inclusion by developing a DEI philosophy, programs and practices and aligning them in everything we do to attract and retain employees.
4. **Enhance** our tools & technology to improve ease-of-use, access, and communications
5. **Expand** the number of clients served by growing programming, centers, locations, or geography in a planned, sustainable way
6. **Diversify** our sources of funding, including securing new revenue streams

Bridgewell 2022-2025 Strategic Plan – Executive Summary

GOALS	I. Become the employer of choice by finding and keeping the right people, providing with necessary resources, nurturing the Bridgewell culture, and developing our people's skills, capabilities, and desire to deliver our mission in a high quality, sustainable way				II. Expand Bridgewell's needs-based services which increases independence and quality of life for our clients, families, and communities	III. Develop a sustainable, profitable funding model that supports the forward-looking vision and mission
STRATEGIES	1. Retain and engage talent by developing programs that will help people to grow and want to stay; engage teams with improved visibility, communications, and support to improve culture and collaboration	2. Attract talent with competitive compensation and improved hiring and onboarding	3. Create an environment that fosters Diversity, Equity and Inclusion by developing a DEI philosophy, programs and practices and aligning them in everything we do to attract and retain employees.	4. Enhance our tools & technology to improve ease-of-use, access, and communications	1. Expand the number of clients served by growing programming, centers, locations, or geography in a planned, sustainable way	1. Diversify our sources of funding, including securing new revenue streams
ACTIONS	a. Assess current workforce perceptions, understanding, and preferred communication channels – Put out survey to staff	a. Develop clear mission-driven value proposition to communicate to prospective employees	a. Search for grant opportunities	a. Survey key users for needs and expectations regarding ease of use/process, access, and communications. Users could be clients, partners, employees, candidates, etc.	a. Research growth options: new services, expanded programming, new locations, create business plan proposals to evaluate and prioritize growth options	a. Research and identify non-state funding options (players, needs, categories, decision makers)
	b. Create consistent, simple, unified, clear process for communicating with teams	b. Conduct benchmarking of total compensation among peer and competitive employers	b. Identify and engage a consultant	b. Identify priority gaps and opportunities to improve IT tools or process to solve greatest user and org needs	b. Assess potential partnerships and mergers to expand footprint and services	b. Create landscape, identify top 20 targets, identify low hanging fruit
	c. Build multi-pronged communications plans based on employee preferences	c. Engage in local schools & universities to promote Bridgewell and the care profession overall	c. Identify grant opportunities	c. Build solution for greatest needs that will improve ease, access, and communications	c. Create a community needs assessment, determine how to gather key metrics for evaluating the needs	c. Determine a win-win proposition and develop an approach for connecting with priority players

Bridgewell 2022-2025 Strategic Plan – Executive Summary



Bridgewell 2022-2025 Strategic Plan – Executive Summary

ACTIONS, CON'T	d. Develop a career path program which includes skills and performance assessment, recognition, new role opportunities, training, coaching, certification, curriculum	d. Gather feedback regarding current onboarding process and success and identify areas for improvements	d. Develop DEI framework	d. Assess current infrastructure as part of change and growth	
TEAMS	Sponsor: Niovi	Sponsor: Niovi	Sponsor: Chris Tuttle	Sponsor: Jeff Bickford	Sponsor: Elaine W
METRICS	Employee satisfaction levels (perception) Retention / attrition rate (% monthly) Absenteeism rate (% monthly) Hiring rate (% monthly) Employees involved in career path program				# clients served # positive outcomes # programs, centers communities s
TIMEFRAMES					
	Identifying the high potential individuals to move forward on a career path				
	e. Establish a “stay” initiative (e.g., stay interviews) as way to keep staff engaged with leadership, heard, and happier		e. Implementation		

1

To **become the employer of choice** by finding and keeping the right people, providing with necessary resources, nurturing the Bridgewell culture, and developing our **people's skills, capabilities, and desire to deliver** our mission in a high quality, sustainable way

2

To **expand Bridgewell's needs-based services** which increases independence and quality of life for our clients, families, and communities

3

To **develop a sustainable, profitable funding model** that supports the forward-looking vision and mission

STRATEGY

1. **Retain** talent by developing a career path training program that will help people to grow and want to stay.

ACTIONS

- Develop a career path program which includes skills and performance assessment, recognition, new role opportunities, training, coaching, certification, curriculum, LOE, \$ needed, measurement, communications
 - Identify positions and core competencies and develop career progression model
 - Identify the high potential individuals to move forward on a career path
- Establish a "stay" initiative (e.g., stay interviews) as way to keep staff engaged with leadership, heard, and happier
- Include DEI requirements to promote all kinds of diversity among candidates

WMBT

- Opportunities for growth, a career path
- Stay interviews and formal feedback

MEASURES

- Employee satisfaction levels (perception)
- Retention / attrition rate (% monthly)
- Absenteeism rate (% monthly)

DRIVERS

- Geographical advantage
- Employee satisfaction task force
- Visible and present leadership
- Positive reputation
- Feedback forums

BARRIERS

- Unknown barriers to communications
- Funding resources
- Not seen as a desired profession

BRIDGEWELL STRATEGY LEAD

- X

CONFIDENTIAL – For internal Bridgewell purposes only. Imbue Partners LLC, 2022

1

To **become the employer of choice** by finding and keeping the right people, providing with necessary resources, nurturing the Bridgewell culture, and developing our **people's skills, capabilities, and desire to deliver** our mission in a high quality, sustainable way

2

To **expand Bridgewell's needs-based services** which increases independence and quality of life for our clients, families, and communities

3

To **develop a sustainable, profitable funding model** that supports the forward-looking vision and mission

STRATEGY

2. **Attract** talent with competitive compensation and improved hiring and onboarding

ACTIONS

- Develop clear mission-driven value proposition to communicate to prospective employees
- Conduct benchmarking of total compensation among peer and competitive employers
- Engage in local schools & universities to promote Bridgewell and the care profession overall
- Gather feedback regarding current onboarding process and success and identify areas for improvements

WMBT

- Effective recruitment and onboarding
- Clear understanding of current and future workforce needs

MEASURES

- Qualified candidates applying
- Qualified hires
- Retention X days beyond onboarding

DRIVERS

- Geographical advantage
- Creating career path
- EE satisfaction task force
- Visible and present leadership
- Training & development

BARRIERS

- Unknown barriers to communications
- Funding
- Data gaps
- Lacking robust marketing program including social media
- Not seen as a desired profession

BRIDGEWELL STRATEGY LEAD

- X

CONFIDENTIAL – For internal Bridgewell purposes only. Imbue Partners LLC, 2022

1

To **become the employer of choice** by finding and keeping the right people, providing with necessary resources, nurturing the Bridgewell culture, and developing our **people's skills, capabilities, and desire to deliver** our mission in a high quality, sustainable way

2

To **expand Bridgewell's needs-based services** which increases independence and quality of life for our clients, families, and communities

3

To **develop a sustainable, profitable funding model** that supports the forward-looking vision and mission

STRATEGY

3. **Engage** teams with improved visibility, communications, and support to improve culture and collaboration

ACTIONS

- Assess current workforce perceptions, understanding, and preferred communication channels
- Build communications plans based on employee preferences
- Create consistent, simple, unified, clear process for communicating with teams

WMBT

- Seamless and accessible connectivity and communications

MEASURES

- Employee perception/satisfaction
- Retention / Attrition (% monthly)
- Absenteeism (% monthly)

DRIVERS

- Employee satisfaction task force
- Motivated and aligned leadership
- Feedback forums

BARRIERS

- Unknown barriers to communications
- Funding
- Data gaps
- Ownership and tools for effective communications

BRIDGEWELL STRATEGY LEAD

- X

CONFIDENTIAL – For internal Bridgewell purposes only. Imbue Partners LLC, 2022

1

To **become the employer of choice** by finding and keeping the right people, providing with necessary resources, nurturing the Bridgewell culture, and developing our **people's skills, capabilities, and desire to deliver** our mission in a high quality, sustainable way

2

To **expand Bridgewell's needs-based services** which increases independence and quality of life for our clients, families, and communities

3

To **develop a sustainable, profitable funding model** that supports the forward-looking vision and mission

STRATEGY

4. **Enhance** our tools & technology to improve ease-of-use, access, and communications

ACTIONS

- Survey key users for needs and expectations regarding ease of use/process, access, and communications. Users could be clients, partners, employees, candidates, etc.
- Identify priority gaps and opportunities to improve IT tools or process to solve greatest user needs
- Build solution for greatest needs that will improve ease, access, and communications

WMBT

- Technology to communicate with employees and candidates for employment
- Reliable and secure network accessibility

MEASURES

- User satisfaction feedback
- Process efficiency (time saved, steps reduced, etc.)

DRIVERS

- Collaborative culture
- Process efficiency
- Skilled teams

BARRIERS

- Clear understanding of user (employee, client, partner, etc) needs and expectations
- Regulatory and compliance issues
- Resources and funding

BRIDGEWELL STRATEGY LEAD

- x

1

To **become the employer of choice** by finding and keeping the right people, providing with necessary resources, nurturing the Bridgewell culture, and developing our **people's skills, capabilities, and desire to deliver** our mission in a high quality, sustainable way

2

To **expand Bridgewell's needs-based services** which increases independence and quality of life for our clients, families, and communities

3

To **develop a sustainable, profitable funding model** that supports the forward-looking vision and mission

STRATEGY

5. **Expand** the number of clients served by growing programming, centers, locations, or geography in a planned, sustainable way

ACTIONS

- Research growth options: new services, expanded programming, new locations, create business plan proposals to evaluate and prioritize growth options
- Assess potential partnerships and mergers to expand footprint and services
- Create a community needs assessment, determine how to gather key metrics for evaluating the needs

WMBT

- Financial analysis of program stability and service type compared to the vision

MEASURES

- # clients served
- # positive outcomes
- # programs, centers, communities served

DRIVERS

- Strong programs and mission
- Positive reputation
- Financial accountability
- Motivated and aligned leadership team

BARRIERS

- Data gap for decision making, need improved data analytics
- Understand what data that we need to collect and how to get it
- Assessment of internal infrastructure and capacity to support new initiatives

BRIDGEWELL STRATEGY LEAD

- x

CONFIDENTIAL – For internal Bridgewell purposes only. Imbue Partners LLC, 2022

1

To **become the employer of choice** by finding and keeping the right people, providing with necessary resources, nurturing the Bridgewell culture, and developing our **people's skills, capabilities, and desire to deliver** our mission in a high quality, sustainable way

2

To **expand Bridgewell's needs-based services** which increases independence and quality of life for our clients, families, and communities

3

To **develop a sustainable, profitable funding model** that supports the forward-looking vision and mission

STRATEGY

6. **Diversify** our sources of funding, including securing new revenue streams

ACTIONS

- Research and identify non-state funding options (players, needs, categories, decision makers)
- Create landscape, identify top 20 targets, identify low hanging fruit
- Determine a win-win proposition and develop an approach for connecting with priority players
- Assess current services, skills, and strengths that could be leveraged for sale to other organizations. Determine who might be interested and a plan to test assumptions.

WMBT

- Identify and obtain new sources of revenue. Understanding available grants and state contracts.

MEASURES

- Employee satisfaction levels (perception)
- Retention / attrition rate (% monthly)
- Absenteeism rate (% monthly)

DRIVERS

- Dedicated leadership and grant writer
- Physical and financial assets that makes us attractive
- Specialty services with credentialed staff

BARRIERS

- Research and analysis required to identify and assess other non-state options
- Understanding of the business models to obtaining new funding

BRIDGEWELL STRATEGY LEAD

- x

APPENDIX

Supporting outputs and analysis
































The workshop's opening exercise prompted everyone to think broadly and freshly about Bridgewell's 3-year strategic goals. This was both an independent and group discussion. Becoming an Employer of Choice and Expanding Services were the areas of greatest focus.

Category	Topic	Goal
Employer of Choice	Safety	Providing a high quality, safe environment - maintaining physical and psychological safety (wellbeing of employees)
Employer of Choice	Employer of Choice	Build the future of the workforce through enhanced branding that increases loyalty and retention, decreases turnover
Employer of Choice	Diversity	Increase diversity of BOD & LT
Employer of Choice	Organization Dev't and Change	Build the culture, capacity and capability to deliver mission & goals in a high quality, sustainable way including people, process, technology
Employer of Choice	Team Skills / Training / Onboarding / Resiliency	Build career paths, improve hiring and onboarding, address diversity
Employer of Choice	Culture	Build a transparent, communicative culture to support our teams
Services	Expand Needs-based services	Develop and deliver needs-based services that increases independence and Quality of Life for clients, families and communities by improving access for all. Strategic creation of services based on community needs and gaps.
Services	Growth & Expansion	Increase our footprint including new opportunities that respond to changes in the community. Expanding number of centers and employees and people serviced Expand programming sustainably
Services	Community Partnerships/ Networking	Partner to address unmet needs in a community
Financial/Brand	Brand recognition	Increase our brand recognition with state funders and communities, how to message around parent company
Financial	Financial Sustainability	Increase and diversify funding to enable the mission and all other goals
Operations	Risk Management	Establish risk management plans to prepare for challenges and audits
Operations	Operational Excellence	Build the operational capacity and resources to enable our mission

Defining 'What Must Be True'

Workforce Planning	Diversity, Equity & Inclusion	Culture & Values (Harmonization)	People, Talent & Skills	Fiscal Trends & Sustainability	Technology & Infrastructure
Seamless and accessible connectivity and communications. Workforce must understand the company mission, vision, goals, and roles	Communicating DEI as a priority value. Educate about Bridgewell definition of DEI and why it is important.	EOC. Flexibility and a reputation for fair compensation	Fair and competitive compensation	Identify and obtain new sources of revenue. Understanding available grants and state contracts.	Reliable and secure network and accessibility
Need clear understanding of current and future workforce needs, including competitive compensation and career growth options.	Develop diversity at all levels.	Clear understanding of the current employee's attitudes and beliefs about Bridgewell	Opportunities for growth, a career path	Identify and market Bridgewell's internal capabilities i.e. selling training to others	Accessibility includes helping our employees get what they need when they need it so that they can use it i.e. ADA, training
Strong name brand recognition and differentiation.	Universal commitment and involvement. Celebrate and highlight diversity.	Harmonize the culture and values of any merger or partner opportunity	Visibility of leadership, meeting people where they are at, showing understanding and support	Understand the cost of doing business (inflation, labor costs) and create a future investment strategy	Integration with partners and affiliates
Ability to stimulate and grow effective management.	Willingness to have the difficult conversations. Evaluate our systems, process, and mindset to uncover biases.	Easy, accessible, clear communications delivered via multiple channels	Easy, accessible, clear communications of our values and mission	Financial analysis of program stability and service type compared to the vision.	Technology to communicate with employees and candidates for employment
Effective recruitment, comprehensive onboarding.	Evaluating our recruiting channels.	Staff rightsizing to avoid poor working conditions	Stay interviews and formal feedback sessions (Town Hall)	Identify funding sources outside of state and current options.	

Defining 'What Must Be True'

Workforce Planning	Diversity, Equity & Inclusion	Culture & Values (Harmonization)	People, Talent & Skills	Fiscal Trends & Sustainability	Technology & Infrastructure
Seamless and accessible connectivity and communications. Workforce must understand the company mission, vision, goals, and roles 	Communicating DEI as a priority value. Educate about Bridgewell definition of DEI and why it is important. 	EOC. Flexibility and a reputation for fair compensation 	Fair and competitive compensation 	Identify and obtain new sources of revenue. Understanding available grants and state contracts 	Reliable and secure network and accessibility 
Need clear understanding of current and future workforce needs, including competitive compensation and career growth options. 	Develop diversity at all levels. 	Clear understanding of the current employee's attitudes and beliefs about Bridgewell 	Opportunities for growth, a career path 	Identify and market Bridgewell's internal capabilities i.e. selling training to others 	Accessibility includes helping our employees get what they need when they need it so that they can use it i.e. AD, training 
Strong name brand recognition and differentiation. 	Universal commitment and involvement. Celebrate and highlight diversity. 	Harmonize the culture and values of any merger or partner opportunity 	Visibility of leadership, meeting people where they are at, showing understanding and support 	Understand the cost of doing business (inflation, labor costs) and create a future investment strategy 	Integration with partners and affiliates 
Ability to stimulate and grow effective management. 	Willingness to have the difficult conversations. Evaluate our systems, process and mindset to uncover biases. 	Easy, accessible, clear communications delivered via multiple channels 	Easy, accessible, clear communications of our values and mission 	Financial analysis of program stability and service type compared to the vision. 	Technology to communicate with employees and candidates for employment 
Effective recruitment, comprehensive onboarding. 	Evaluating our recruiting channels. 	Staff rightsizing to avoid poor working conditions 	Stay interviews and formal feedback sessions (Town Hall) 	Identify funding sources outside of state and current options. 	

Goal: To become employer of choice

STRATEGIES

- Define a clear mission-driven proposition based on the different services we provide & communicate to attract employees
- Develop and employee engagement & recruitment programs
- Advocate and re-engage workforce into the industry by engaging in local schools & universities
- DEI program – create a culture that embraces diversity
- Develop means to assess temperature of current workforce
- Conduct benchmarking of total compensation among peer organizations
- Engage our current management team to identify talent for growth/development career planning
 - Identify which positions can have a career growth path
 - identify core competencies and develop career progression model
 - Identify the high potential individuals to move forward on a career path
 - Develop the growth path program which includes assessment, recognition, employment, training, coaching, certification, curriculum, LOE, \$ needed, measurement, communications
 - Execute the program
- Develop a career path training program to enable people to grow
- Develop a communications plan to promote career growth, actions, and results

Goal: Develop and deliver needs-based services that increase independence and quality of life

STRATEGIES

- Implement business intelligence tools to enable fact-based decision making
- Identify quality of life metrics that should be measured and determine how to get the information needed to measure/monitor
- Develop a means to assess the needs of the community
- Develop a networking strategy to identify needs & resources
- Develop a plan to identify what data we have and how to aggregate it and communicate it out

Goal: To increase diversity of non-state funding to enable the mission sustainably

STRATEGIES

- Research and identify non-state funding options (players, needs, categories, decision makers)
- Create landscape, identify top 20 targets, and develop and an approach for connecting with priority players
- Acquire 1 new funding source
- Increase funding by x% annually
- Continue to add 1 new funding source annually

Goal: Provide high quality, safe environment (physical/psychological)

STRATEGIES

- Focus on developing a culture of trust and transparency by increasing visibility at VP+ levels. Open lines of communications
- Embrace crisis by increasing communications from leadership level

Goal: Create a culture that embraces diversity by creating a DEI program

STRATEGIES

- Define what diversity means at Bridgewell (beyond race)
- Develop DEI mission & vision statement that will inform how BW will ensure DEI



SOAR Analysis Teams took a strengths-based approach to identifying what Bridgewell does uniquely better than anyone else and mapped how opportunities can align to aspirations

CURRENT



STRENGTHS

- Dedicated staff
- Strong programs
- Specialty services
- Positive reputation
- Geographical advantage
- Diverse and innovative services
- Financial accountability
- Analytical approach to program evaluation
- Feedback forums
- Training and development
- Motivated and aligned leadership team
- Strong mission
- Collaborative service agency
- Diverse education and experience



OPPORTUNITIES

- Develop and deliver innovative need-based services: mental health, substance use, ABI, residential, veterans
- Increase visibility in the community
- Define and promote value proposition of programs
- For profit day care
- Sell current services
- Partnerships and mergers
- Refine service lines to support workforce planning and DEI
- Expand service area
- Enhanced use of technology, improve ease, access, and communications
- Develop baseline measures of key metrics such as diversity and retention

FUTURE



ASPIRATIONS

- Consistent high-quality care
- Become employer of choice
- Continue to foster calculated risks
- Increase visibility and brand awareness in the community
- Long term financial sustainability
- Become industry leader, model organization
- Structured internship and supervision
- Engaged and diverse workforce
- Agency thriving at end of state re-arrangement
- Resilient and adaptive to change



RESULTS

- More people served; more needs met
- Leader in positive program outcomes
- Engaged workforce, decreased turnover, improved culture
- Improved retention
- Diversified revenue stream, financial stability
- Increase brand awareness
- Diverse workforce at all levels
- Consistent expansion
- Effective recruitment
- Enhanced communications

INTERNAL

EXTERNAL