



Building wellness together

Momentum *for* Health

**Multi-Year Impact and Strategic Priorities
Adopted September 2021**

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I. Message from the CEO

Friends,

I am excited to share Momentum for Health's strategic plan for the next several years. Our community's needs are constantly changing, especially in the wake of COVID-19. Momentum for Health has always adapted to meet the moment of every era and decade to provide the best quality of care possible for our clients. As we look ahead, we're launching a new strategic plan that focuses on innovation and growth resulting in greater access and improved outcomes for our community.

Our planning process began in January 2021 and involved many months of hard work from both board and executive team members. We have thought hard about the current market, what changes we expect to see in behavioral health in the next few years, and what interventions would be the most effective to the people we serve. Many of the priorities we have identified were brought to our attention and championed by our hardworking, compassionate frontline employees, who have a deep understanding of our clients' needs.

Whether you are a friend, supporter, client, employee, or partner of Momentum for Health, I invite you to join us as we build a more dynamic and more accessible behavioral health network for our community. The bold initiatives in this plan cannot be accomplished alone. It will take a combination of conversations, investments, and deep community support to achieve this vision of a stronger and healthier Silicon Valley.

Thank you for your friendship. We look forward to taking this journey together.

Sincerely,

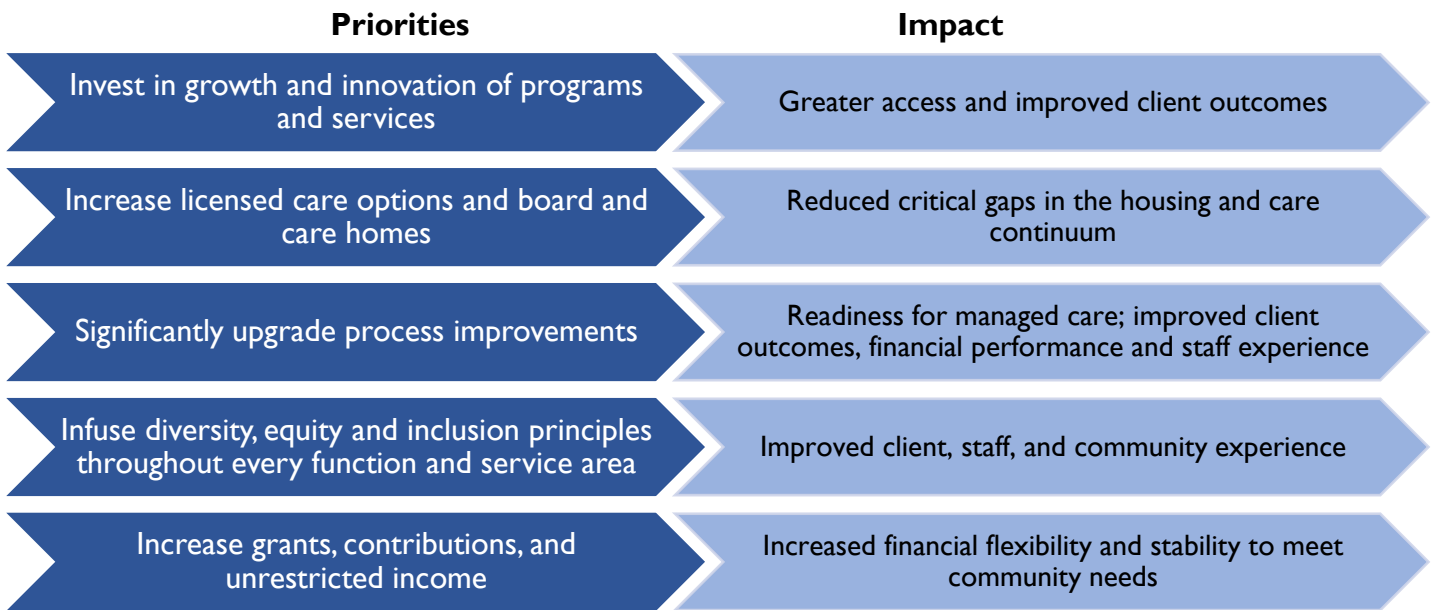


David K. Mineta, MSW
President & CEO

II. Overview of Strategic Priorities and Desired Impact

Over the next few years Momentum will focus its energies on five major strategic initiatives in order to achieve significant impact for the community. All these areas overlap and improvements in one area will materially advance improvements in the others, thus providing an amplifying effect for the community. Because community dynamics and needs are constantly changing, Momentum will continue to evaluate the underlying assumptions and context for these priorities, and adjust the specifics as needed to remain responsive, relevant, and valuable in its work.

More specifics on these priorities are provided later in this document.



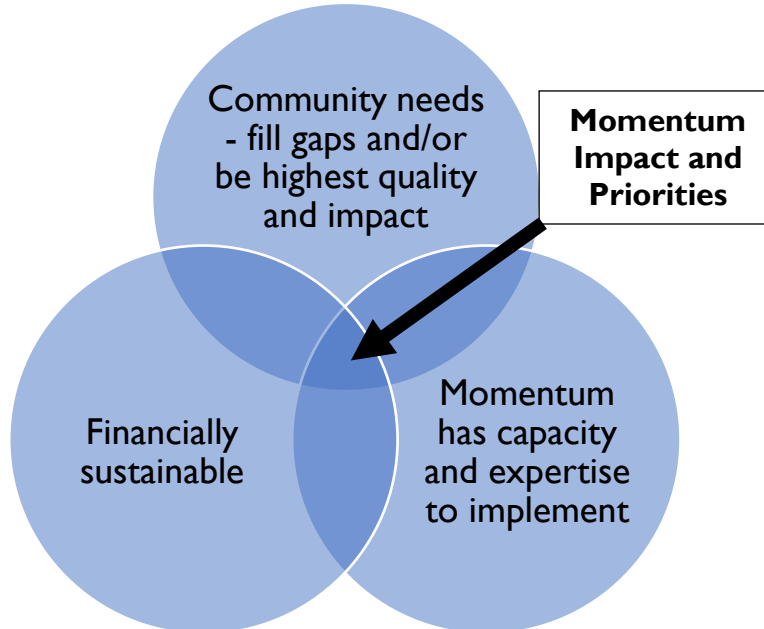
III. Approach to Strategy Development

Momentum launched its strategy process in January 2021, and the Board adopted the framework in September 2021. During that time, the Board and staff invested hundreds of hours to ensure a rigorous and thoughtful approach to its explorations and final conclusions. Over nine months, the Momentum team:

- Integrated DEI topics into all strategy conversations and decision making.
- Invited all staff and board members to engage in various strategy activities.
- Discussed Momentum’s accomplishments, assumptions, lessons learned, core competencies, and challenges.
- Identified a list of key strategic questions facing the organization for the next 3-5 years.
- Identified important trends and innovations locally, regionally and nationally.
- Brainstormed a range of possible ways to deliver the highest impact for the community.
- Developed mini business plans to further flesh out and test ideas.
- Engaged stakeholder feedback to better understand the changing community needs and to test underlying assumptions and check for blind spots.

As it moved through its exploration and discernment process, Momentum continued to filter ideas that fit the strategy “sweet spot” of overlapping needs, expertise, and financial sustainability as illustrated below.

Assessing Possible Strategic Priorities



IV. Underlying Context and Assumptions

Momentum recognized that any strategy work must involve a thorough understanding of the community today, identifying the most important trends, anticipating the needs of the future, and articulating underlying assumptions and unknowns. In this way, the agency can continue to monitor and adjust the priorities in a rapidly changing and frequently unpredictable world.

Some of the major considerations for developing Momentum's strategy include:

- Mental health needs continue to escalate locally and nationally at an alarming rate. Needs are more severe, and (thankfully) reduced stigma means exponentially more people are seeking more services.
- While there is an increase in the population with co-occurring needs, the current government systems are not equipped to provide integrated services to these individuals and families.
- Housing instability continues and worsens. There are serious, persistent and growing gaps in the spectrum of options. There appears to be more affordable housing coming online, but not for those with behavioral health issues.
- Managed care rollouts scheduled for January 2022 through 2027 (CalAIM) will require demonstrated outcomes and place a higher focus on data.
- There are increases in funding opportunities and requests for partnerships due to attention on mental health gaps and inequities in care.
- Expectations have become universal and non-negotiable for organizations to holistically and successfully address DEI and access.
- Cybersecurity and ransomware present growing risks.
- Workforce challenges are deepening as the U.S. faces monumental shifts in employee wellness, priorities and expectations. Pre-existing talent and pipeline shortages have gotten more acute since COVID, and mental health and clinical roles are particularly impacted.

While these factors are sobering, Momentum is well positioned to meet community needs in a responsive, flexible, welcoming, and high-quality way. Over its 50+ year history, Momentum has always monitored the community's changing needs and invested in new approaches and services to meet them. Momentum sees the "whole person" and continues to address gaps to overall wellness, including workforce readiness, housing stability, social connections, co-occurring conditions, and a mix of behavioral and medical needs. Over the years the agency has successfully weathered and led through significant policy and funding changes such as the Affordable Care Act, mental health parity, managed care, multiple recessions, and of course more recently, COVID response.

Momentum's roots trace back to the 1950's, when a number of organizations formed to build a community-based response and alternatives to address deinstitutionalization. Each of these organizations had a commitment to understanding and serving the whole person, being responsive to changing community needs, and understanding that housing is critical to overall mental wellness.

On January 1, 1997, four of these respected agencies with a total of 100 years of service to the community joined together to create Momentum for Health (originally called Alliance for Community Care). The reasons to do this included increased ability to provide a wider array of more easily accessible, culturally competent services for people who have a mental illness; strengthened quality improvement, data systems and staff training; improved efficiency of operations; enhanced community education capabilities; and continued implementation of effective innovative services. In July 2020, the agency became Momentum for



Health, signifying the expansion of services beyond traditional mental health to include addiction treatment and other programs, providing comprehensive care to our clients and community.

The merger launched Momentum into over two decades of growth and innovation, introducing services that led the state and region to more beneficial approaches to mental health, in addition to having a positive impact on the individuals and families locally. In just the past few years, Momentum has developed new lines of services including specialized tracks for trauma, addiction, and co-occurring challenges; opened a new women's supportive housing program; launched telehealth services; acquired and developed a number of new properties to provide more services to more people throughout the county; and provided more options for people to thrive in recovery, wellness and health.

Today Momentum is the largest private nonprofit provider of adult mental health services in Santa Clara County. The programs and services for individuals living with a mental illness are comprehensive and include a prevention and early intervention program, adult and transitional age youth (14 to 24) outpatient services, employment services, day rehabilitation services, residential treatment, supported housing and a volunteer program. In addition, Momentum works to reduce and eliminate the stigma that surrounds mental illness and mental health care through a community relations program that promotes education, diversity and collaboration.

This rich legacy of responsive, community-first services; innovative and high-impact care; growth and responsible financial stewardship; leadership in fostering collaborations and partnerships; and commitment to a diverse, thriving workforce positions Momentum to tackle the unprecedented challenges facing the community today.



V. Specific Goals and Outcomes

Within the five main strategic priorities, Momentum has identified specific goals and desired outcomes to shape its next chapter. Each goal is highly connected to the others and success will come from a fully integrated approach. Momentum will review progress toward these goals every six months and adjust as necessary to meet changing conditions and ensure it is focused on fulfilling its highest value in the community.



Goal: Expand La Selva Group

Why:

- Meets a critical need for the middle class – those who cannot qualify for Medi-cal and cannot pay full out of pocket.
- Takes high risk clients no one else will take.
- There is consistently a waiting list and increasing demand for La Selva services.
- Offers pioneering programs (such as Functional Neurological Disorder program) that are offered by very few other providers nationally; possibility for national expansion.

Multi-year goals/outcomes:

- Shift from operating out of a business-type office to a true wellness campus.
- Expand FND program to expand national attention and referrals from across the country.
- Add new services and expand evening/weekend hours to meet client needs and improve outcomes.

Goal: Offer Transcranial Magnetic Stimulation (TMS) Therapy

Why:

- Tested therapy proven to improve depression among clients who are not adequately responding to medications.
- Opportunity to better serve our clients and offer better access so they don't need to go elsewhere for this treatment; enhances integration and comprehensiveness of client experience.
- TMS is currently being investigated as a treatment for a wide range of conditions other than depression – if FDA indications for TMS expand, Momentum will be better positioned to leverage those opportunities.

Multi-year goals/outcomes:

- Develop the expertise needed to provide this new service.
- Establish TMS with steady throughput of client utilization at LSG.
- Clients are demonstrating medical benefit as a result of TMS therapy.

Goal: Provide Integrated Care/Co-Occurring Service Delivery

Why:

- On average nationally, 70% of seriously mentally ill clients have co-occurring disorders involving mental health and substance use disorder. Nonetheless, the California system is designed to separate mental health from substance use disorder programs. Providing integrated care allows clients to engage in treatment in all domains where they are faced with challenges through one program rather than having to seek out numerous providers and programs to address these issues.
- Addressing additional domains to mental health improves client outcomes overall, including reduced client acuity, fewer hospitalizations, more stabilization in other domains such as housing and family/social relationships.
- Clients who are engaged through this co-occurring approach can access more intensive/focused addiction treatment services if needed through other Momentum programs – supports ongoing build-out of continuum of care.
- While this priority focuses on co-occurring mental health and substance use, this initiative will also prepare Momentum for enhanced integration for client needs in additional domains such as medical needs, workforce readiness, etc.

Multi-year goals and outcomes:

- Integrated approach is accessible for any client presenting these co-occurring challenges, resulting in improved client outcomes.
- Adoption of DLA20 evidence-based measures with assessment that goes through all domains in a client's life; begin tracking client outcomes based on assessment baseline and progress over time.
- Staff are equipped to identify and provide treatment in co-occurring domains; able to support whole-person care without referring out to other multiple services/providers; able to more effectively support clients and track progress in multiple domains.

Goal: Enhance Communications & Web Design

Why:

- Communications and website need to reflect the quality and impact of Momentum's program delivery, and be highly inviting and functional for clients, donors, and other interested parties.
- Will set Momentum up for success in being competitive in managed care market: higher visibility, improved access of information, easier engagement for consumers, more attractive to health plans.
- Enhances readiness to integrate with federally mandated client access portal in future years.
- Supports other Momentum initiatives to reduce stigma, provide community education, support outreach and prevention efforts.

Multi-year goals and outcomes:

- People in community who need services know how to find us, what services we have, and how to connect to meet their needs easily.
- The website and communications are supporting community prevention, health education, and reduced stigma goals.
- Momentum presents as a welcoming, inclusive, high quality, "solid", trusted agency – by community members, partners, donors, and health plans.
- Momentum brand is recognizable beyond the mental health community, and the brand represents our value and values.



- Communications and the website are supporting visibility of addiction services, housing continuum, etc. in addition to mental health services.



Why:

- Currently clients “graduate” from one level and move into independent living before they are ready. Many prior options for licensed board and care homes have closed.
- Some clients need permanent licensed care solution, and the community does not have sufficient options for this population.
- Housing insecurity is a major social determinant to health.
- Provides more options for clients to transition along a spectrum of care and to integrate into society.
- Improves client outcomes by offering seamless continuum of care, and increased housing stability.

Multi-year goals and outcomes:

- Momentum owns a 100-bed licensed board and care facility (or facilities equaling that number).
- Momentum runs/manages multiple 8-16 bed board and care units.
- Leverages collaboration and partnerships throughout the community.



Why:

- Position Momentum for future growth while remaining competitive and ensure readiness for managed care and changing regulatory environments.
- Improve ability to track client outcomes and progress and adjust care as needed.
- Improve staff experience through increased ease of use.
- Enhance efficiencies, increase utilization rate, decrease errors, and streamline costs.
- Improve cybersecurity and mitigate increasing risks.

Multi-year goals and outcomes:

- Meeting needs of regulators, funders, clients, and staff.
- Improved tracking, analysis and reporting of client outcomes.
- Improved efficiency -- managers’ time is freed to focus on clients.
- Established best practices that are standardized, documented, and implemented; converting more processes from paper to electronic.
- Enhanced cybersecurity.
- Enhanced processes across all functions: Clinical Operations; IT; HR; Quality Improvement; Billing and Finance; Facilities; Administration.

Priorities

Impact

Infuse diversity, equity and inclusion principles throughout every function and service area

Improved client, staff, and community experience

Why:

- By integrating throughout all functions and services, Momentum’s diversity, equity, and inclusion (DEI) program, which has already advanced significantly in recent years, will ensure all Momentum staff are better trained and positioned to provide culturally affirming care that includes addressing implicit bias, race and social equity, and cultural humility. Provides support for those who are marginalized, improves equity, reduces social stigma and discrimination.
- Increases client outcomes and improves client experience due to personalized experience, improved access to care; client background/context provides unique strength-based resources to provide them individualized, more effective care.
- Improves client and staff retention because Momentum strives to be inclusive and respectful to individuals of all backgrounds.
- Impact on workforce – gives Momentum a means to attract and retain staff; staff represent community; staff know their skills and background are sought as part of this agency’s culture; staff feel Momentum is invested in “keeping me”; Momentum “wants me to be part of this community.”
- Demonstrates Momentum’s ongoing board/staff commitment to fully integrated DEI values, principles and practices.

Multi-year goals and outcomes:

- Clients demonstrate increased and improved treatment outcomes and retention as a result of receiving inclusive services that support client uniqueness and specific needs; feedback surveys indicate Momentum is delivering quality services that respect client background and are inclusive.
- Staff report that equality, openness, and belonging are critical reasons for employees remaining and thriving; and that Momentum is demonstrating that it is respectful and appreciative of staff of all backgrounds.
- Community considers Momentum a provider of choice through word of mouth and client personal experience, as a result of well-trained and affirming staff delivering inclusive services.
- Integration of DEI into agency functions to ensure commitment is woven into fabric of who the agency is.
- 100% of staff are trained to deliver unbiased/competent and inclusive services; training is a standard component of all onboarding.

Priorities

Impact

Increase grants, contributions and unrestricted income

Increased financial flexibility and stability to meet client needs

Why:

- Will increase unrestricted, flexible income sources.
- Government funding cannot meet all community needs.



- Adds flexibility to implement initiatives and meet changing community needs.

Multi-year goals and outcomes:

- Increase percentage of Momentum’s revenue through contributed sources.
- Increase grant revenue and the annual fund.
- Acquire more diverse funding sources through new private funders.
- Grow donor base to provide Momentum with the option to launch major campaigns in the future.
- Increase capacity to cultivate donors with larger major gift capacity.

VI. Summary

Momentum has an ambitious vision for the future as we work to accomplish these five strategic priorities. It will not be simple or easy, particularly as our public healthcare system in California continues to evolve. But with the support of our friends and partners, we can make sure that there are dynamic services across the continuum of care accessible to everyone in our community in the years ahead.