

# Strategic Plan 2021-2023



# About Us

## Our Board of Directors

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Todd Baker, Vice President  
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## Our Staff

Sharon Adams, Chief Executive Officer  
Dr. Gregg Stoner, Chief Medical Officer  
Mike Cohlman, Chief Financial Officer  
Melody Shake, VP of Quality & Compliance  
Lauren Lenz, VP of Human Resources  
Nathan Price, Chief Information Officer  
Mary Annen, Project Manager  
Michelle Sanders, Director of Development

Heartland Health Services (HHS) was founded on December 10, 1991. The clinic was primarily staffed by volunteers with only one paid employee. The primary care physicians who worked in the clinic, the specialists to whom they referred, the nurses, pharmacists, social workers, and clerical personnel all donated their time and services. Most of the supplies and equipment used in the clinic were donated. Peoria's three hospitals provided diagnostic testing and inpatient services at no charge to patients on a monthly rotation.

Heartland Health Services was designated as a federally qualified health center (FQHC) on February 1, 2004. Its targeted population includes the largest concentration of low-income adults and children and the greatest percentage of minorities, uninsured, underinsured, medically indigent and homeless within the city of Peoria and the larger Tri-county region. Heartland receives support from the local healthcare systems, the medical schools, community partners and the local businesses.

Heartland Health Services is a Patient Centered Medical Home (PCMH) and is recognized by the National Committee for Quality Assurance (NCQA). Heartland is a community health center addressing health equity, health disparities and social determinants of health. Dedicated to its community, Heartland strives to provide preventative and specialty care to its patient's needs and enhance the overall health of the population in Central Illinois. With 8 locations that are essential to the communities that it serves, Heartland is in the heart of each neighborhood. Heartland has become a HUB for community resources beyond healthcare to aid in patient empowerment and to address social/health disparities throughout neighborhoods.

Communities benefit from utilizing Heartland Health Services as their medical home of choice. The population it serves spans all ages that lack access to health care and health coverage. Heartland provides care and services to all those who need healthcare, regardless of their ability to pay. The Heart of the Community, Heartland Health Services, is a trusted source servicing Peoria and Tazewell Counties.

# Leadership Message

We are delighted to share our new strategic plan with you.

Heartland Health Services (HHS) has developed a strategic plan to inform and guide our important work over the next three years. The plan was developed to prioritize the work that addresses the needs of individuals and families in the communities we serve within an evolving healthcare and social policy environment.

The strategic planning process has allowed HHS to proactively assess the external and internal environment for emerging trends, expectations, and issues. The resulting plan builds on and enhances our capacity to nurture a culture that supports health, wellness, and community equity for caring for each other, the individuals, and families we serve.

Over the next three years, our strategic plan will focus on improving the quality of our services and transforming how those services are delivered in order to improve health outcomes, patient satisfaction, and the efficiency of service delivery. We see our role as working to dismantle barriers to achieve equity in healthcare.

We take pride in the initiatives highlighted in this report, and we extend our deepest gratitude to our dedicated staff, board members, and community partners for the role they all play in our continued success.

We are excited for what's to come and look forward to enhancing our services to meet the growing demands of the communities we are committed to serving.

Wishing you the best of good health,

Sharon Adams,  
Chief Executive Officer



# Our Approach



In developing this strategic plan, Heartland Health Services reviewed its current situation, its community's needs for services and established its desired future position. The purpose of the Strategic Plan is to set and document goals and strategies for the organization. The goals and strategies, when accomplished, are directed at programs and services that will better serve the needs of HHS patients and the community.

HHS remains clearly focused on providing affordable, accessible healthcare, behavioral health, and supportive services for persons living in the communities we serve. Management, governing board, and the staff will use the strategic plan initiatives to direct programs and services to meet and exceed community expectations for affordability, access, quality, and patient-centered health services. The Strategic Plan also supports the professional aspirations of our valued employees. HHS is advancing, and the strategic planning process, firmly embedded in the organizational culture, directs the path for our future.

The HHS mission and vision reflect a conscious decision by the organization to advance the overall health of their community by providing access to affordable, quality healthcare services. The perpetual focus of the organization is to develop programs and services to meet the needs of the underserved, uninsured, and special sub-populations of our community including persons confronted with health disparities. The strategic plan focuses on goals and objectives to advance the HHS mission and to attain the organization's vision.

For strategic planning to be effective, it is critical that it is conducted in the context of the community it serves and not in a vacuum. This is particularly important in the healthcare environment, where change is dynamic and occurring at a rapid pace. The Board and Leadership Team will continue to evaluate, assess, and adjust the strategic plan on a regular basis, creating a "living" document that is responsive to the changing healthcare environment.

# Our Process

The Strategic Plan was developed with input from a wide variety of constituents as well as a review of available, relevant data. The process used demonstrates our continued commitment to advancing the Heartland Health Services vision while upholding the core values of the organization.

Key steps in the Strategic Planning process are outlined below.

- ✔ Heartland Health Services engaged the services of a Planning Consultant familiar with federally qualified health centers. The CEO directed the overall planning process, with guidance and facilitation of the Consultant.
- ✔ A Community Stakeholder Focus Group was held with key representatives of non-profit agencies, academic institutions, elected officials, and community partners also serving the Peoria service area.
- ✔ Planning Workshops were held with a planning team comprised of board members and representatives from all levels of the organization, to identify strengths, weaknesses, opportunities, and threats; review trends in the local and state legislative environment; review and update the mission statement, vision, and values; study the service area needs and identify potential strategic initiatives.
- ✔ Additional meetings were held with the CEO and staff to identify the goals, strategies, and action steps. Strategies were refined and action steps were finalized.
- ✔ The final Strategic Plan was presented, reviewed, and approved by the Board of Directors.

# Mission, Vision & Values

The Strategic Planning Team reviewed the current Mission, Vision, and Values of the organization and recommended making minor changes to the statements to represent and describe Heartland Health Services' current and future purpose.

## Our Mission

Provide affordable, high-quality health services and remove inequities to improve the lives of all.

## Our Vision

Healthy Lives. Thriving Communities. Mutual Trust.

## Our Values

### **Equity.**

We will create an environment where people feel represented, valued, and respected.

### **Integrity.**

We will be honest, ethical, and transparent in our interactions with others.

### **Collaboration.**

We believe teams of diverse groups of people will achieve more together.

### **Accountability.**

We believe people should be responsible for their words and actions.

### **Innovation.**

We believe creating and adapting to change allows us to grow and evolve.

### **Service Excellence.**

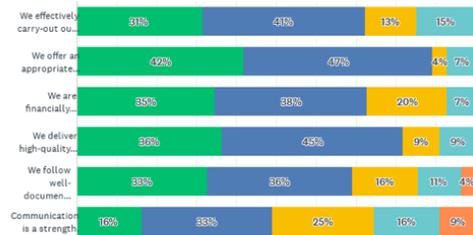
We deliver our services with kindness and compassion with emphasis on continuous improvement and learning.

### **Stewardship.**

We will exercise fiscal responsibility while also being generous in our community.

# Our Team

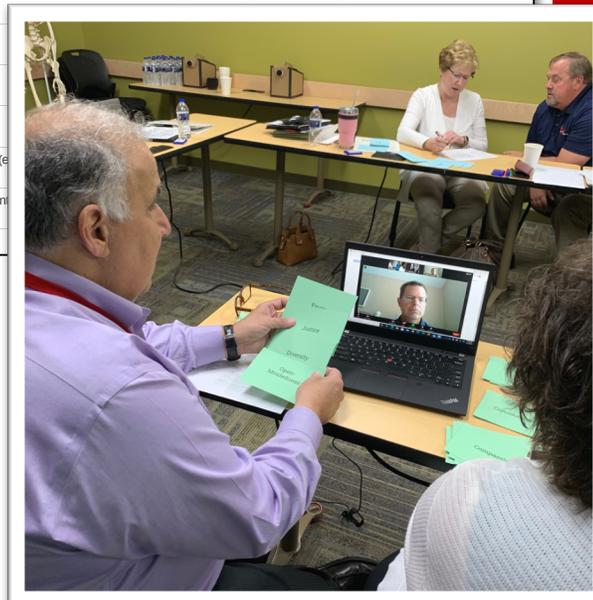
Q1 Please rate your level of agreement with each statement.



Q2 How will the following external changes or trends impact HHS?

Answered: 54 Skipped: 1

	POSITIVE IMPACT	NO IMPACT	NEGATIVE IMPACT	TOTAL	WEIGHTED AVERAGE
Current economy	45%	24%	31%		
Current political climate / legislation					
Changes in technology					
Increased need for services					
Increased awareness of social justice issues (e.g. inequality, immigration, voting rights)					
Covid-19 and related risk mitigation requirements					



To prepare for the strategic planning process, Heartland Health Services conducted a survey to seek input from its Board and staff to better understand what they believe should be the organization's priorities for the upcoming year. *The full report may be found in the Reference & Supporting Documents section of this report.*

# Our Board Members

It is important that any goals and strategies Heartland Health Services puts in place will serve to improve the lives of our patients. To gain their input, we invited them to participate in a focus group to learn what they believe we do best and where we can improve our services. Example responses are listed.

## **What does Heartland do best?**

- Serving the community by delivering care
- Reaching diverse populations such as those experiencing barriers in receiving healthcare
- Finding the gaps within society and filling them
- Outreach in the community
- Diversity of work staff
- Flexibility during COVID

## **What is the community's perception of HHS? What do other people that you know think about HHS?**

- Very good reputation for serving the community and providing a diverse approach to healthcare
- The positive partnership with the community is why I accepted the opportunity to be on the board
- People with familiarity of services are positive, but large segment without familiarity have no knowledge of what HHS offers
- Good collaboration with the two large hospitals in the community
- Clinics are buried in specific neighborhoods, so everyone doesn't know the full depth of services available

## **What should HHS top priorities be over the next few years?**

- Facility footprint- are our current spaces fulfilling the need? Should we have a mobile option?
- Disaster planning for the future (ie COVID)
- Board training/development and succession planning
- Operating efficiency within the clinics
- Develop strategy to stay competitive with other providers in the area
- Focus on true patient care, serve the unique community. Take health care to them.

# Our Community Stakeholders

## **If we didn't have Heartland Health Services....**

- A lot of people would have more barriers to access health care.
- The ERs would be over utilized.
- Specific neighborhoods would be in trouble.
- More people in homeless shelters, in line for food.
- We wouldn't have a partner to provide services.
- More of the low-income residents would see the doctor less often.
- It would be difficult to get basic physicals for children and their families.

## **What does Heartland Health Services do best?**

- Provide a service the community needs, only "steps away".
- "They may be the only trusted partner or friend that a patient might have and are a connection point to other community resources."

## **Anything else the board and staff of Heartland Health Services should know as they plan for the future?**

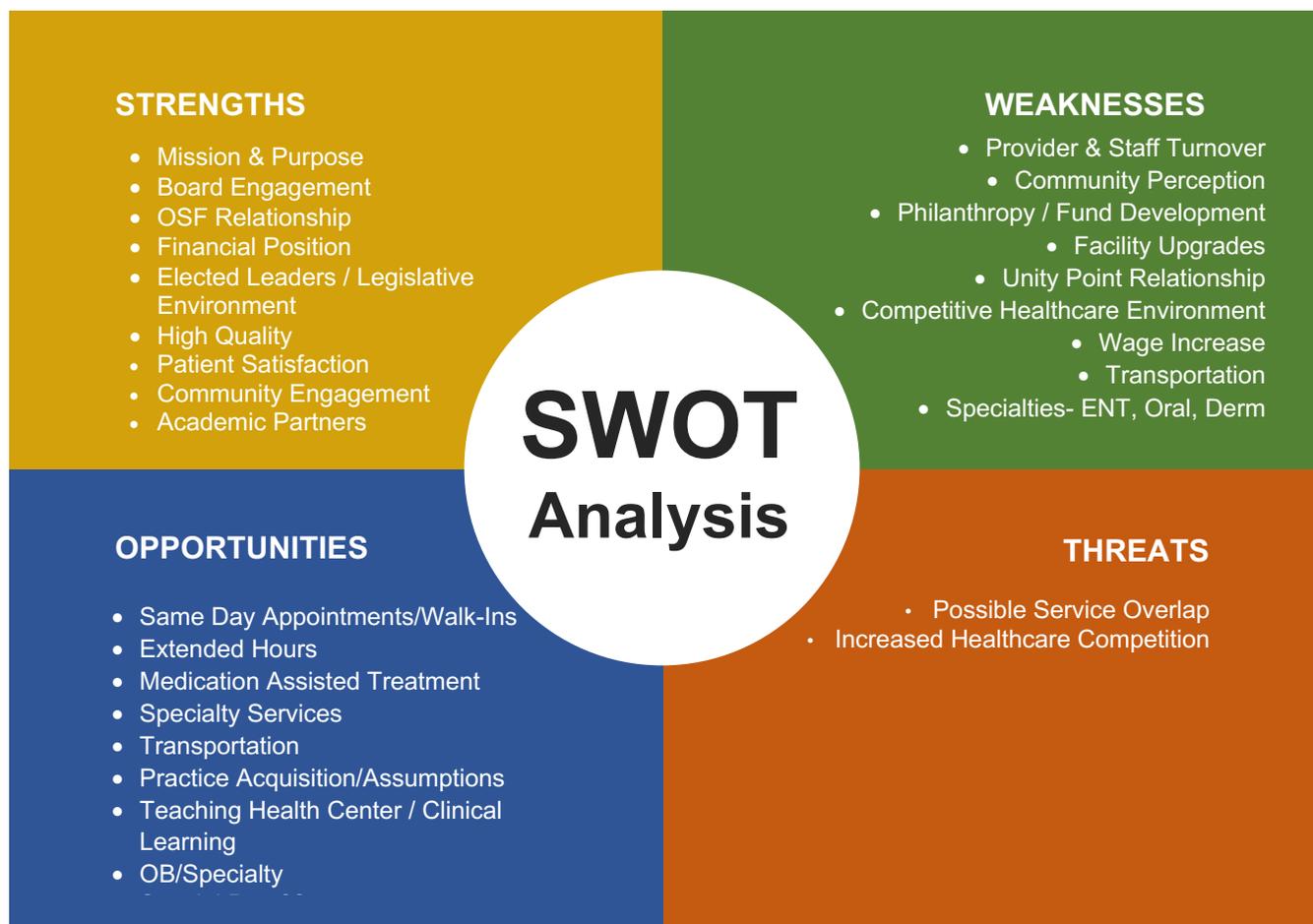
- They've come a long way. "Sharon is the right person for the right job at the right time".
- They need to be proactive instead of reactive.
- "The general public might not be aware, but those that do know are so appreciative. HHS is a huge community asset and is extremely impactful."
- Continue to push for case management.

For the planning process to be effective, we believed it was critical that it be conducted in the context of the community we serve. We proactively sought input from our community leaders to better understand their perception of Heartland Health Services, and to build strong support for the plan's future implementation. Individuals representing community stakeholders, including hospitals, non-profits, and public agencies, were invited to provide input by participating in a focus group discussion. Ten individuals attended. Some of the feedback the group provided is bulleted.

*Additional information may be found in the Reference & Supporting Documents section of this report.*

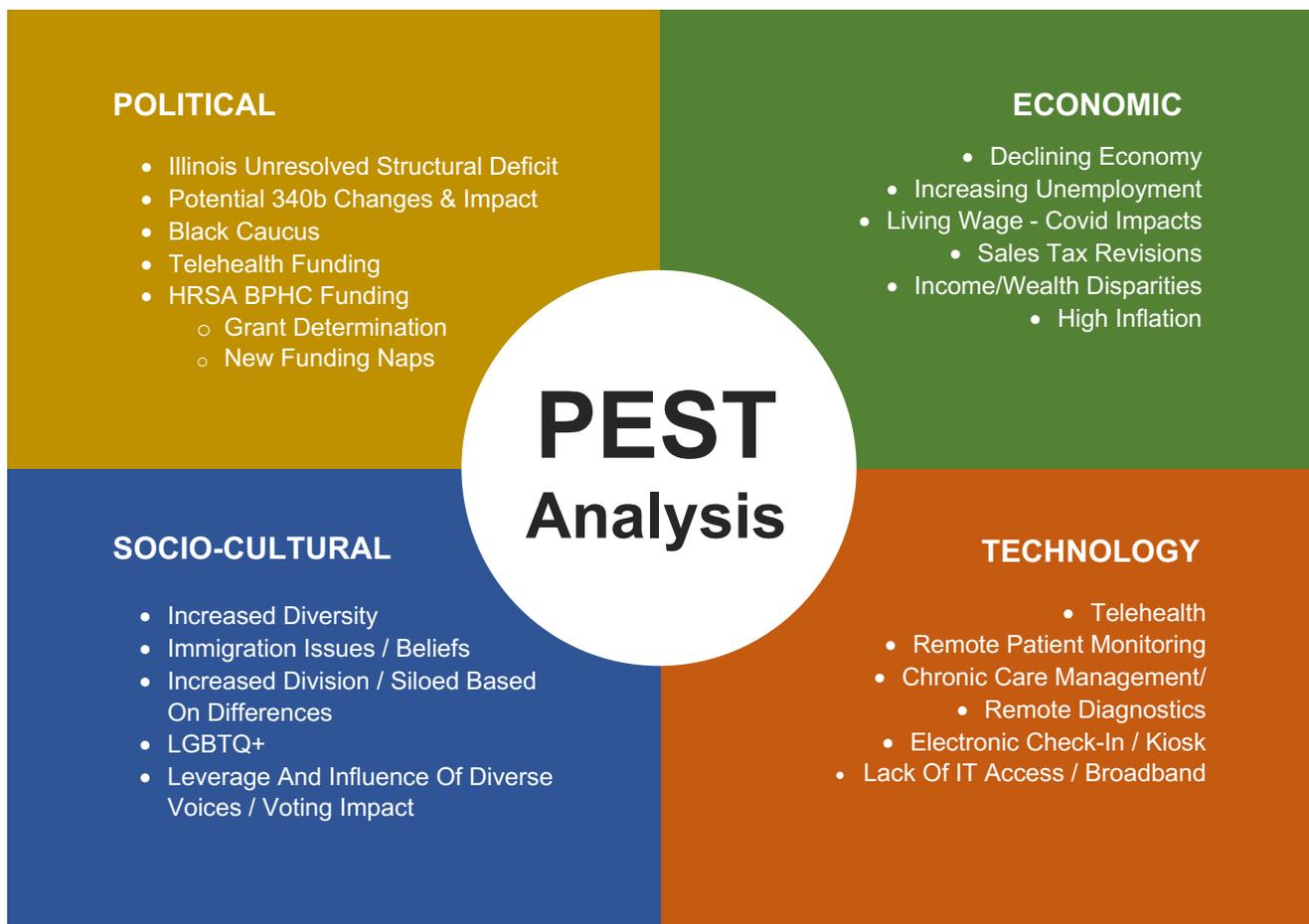
# SWOT Analysis

SWOT is a useful technique for understanding the Strengths and Weaknesses of an organization, and for identifying both the Opportunities open to it and the Threats it faces. Our SWOT provided insight into what direction to take Heartland Health Services. It is a tool that helped us to look at the internal and external environments and what impact it will have on the organization. It also provided valuable information to assist us to make decisions and create a meaningful analysis of the potential challenges, that we may face. Below are Heartland Health Services' strengths, weaknesses, opportunities, and threats as identified by the Strategic Planning Team.



# PEST Analysis

In a PEST analysis, individuals brainstorm the “big picture” characteristics of the organization’s external environment (this could be a community, region, country, etc.) and from this, draw conclusions about significant forces of change operating within it. This exercise provided the Strategic Planning Team with a context for more detailed planning. Similar to a SWOT, the PEST Analysis allowed us to look at the “big picture” factors that might influence our strategic decisions. Below are the Political, Economic, Socio-cultural, and Technology issues that were identified by the Strategic Planning Team as having an impact on Heartland Health Services.



# Goals & Strategies

The Strategic Planning Team identified the strategic goals for the organization in key areas. Action Planning Teams in each strategic goal area of the organization were identified and began the development of action plans. Emphasis was placed on creating plans that measure progress and provide a level of accountability throughout the organization. During a series of web meetings, the Strategic Planning Team finalized goals, strategies, and action plans.

## *Goal 1 – Quality*



**We will continue to be nationally-recognized as a top performer in clinical quality by optimizing technology and our performance improvement activities.**

1. Connect our most complex patients, those with the highest medical, behavioral and social needs with a case manager to comprehensively coordinate care for improved overall health.
2. Establish clinical task forces for each clinical metric to become a top FQHC performer in Illinois.
3. Develop a comprehensive reporting system that includes the key performance indicators in clinical quality, patient satisfaction, financial performance, grants management, and human resource.
4. Develop a system for electronic patient check-in that ensures patient confidentiality and ensures patient confidentiality.



## *Goal 2 – Team*

**We will create a work environment that attracts quality team members, provides them a personally and professionally fulfilling environment, and creates opportunities for them to grow and succeed.**

1. Develop and implement a recruitment plan that prioritizes workforce diversity that reflects the communities we serve.
2. Create individualized plans for our employees that include the training and professional development activities necessary for career advancement and meet succession planning goals.
3. Embrace an organization-wide "Cultural Revolution" to improve customer service excellence, create an environment of trust, and implement systems for continuous quality improvement.
4. Create a board development plan that includes evaluation, training, and ensures all members it is most effectively fulfilling its regulatory and oversight responsibilities through board development.



## *Goal 3 – Growth & Expansion*

**We will provide access to high-quality, integrated, sustainable services and service delivery sites that meet the needs of our community.**

1. Develop and implement a standardized process for evaluating the feasibility of new and current services and service sites.
2. Assess the feasibility and create a plan for Wisconsin Plaza Expansion to serve as a community hub that addresses the social determinants of health.
3. Develop a strategy for obstetrics & gynecology services to best meet the women's health needs of the communities we serve.

# Goals & Strategies



## *Goal 4 – Finance*

### **We will improve financial health and maintain long-term viability.**

1. Attract and retain new patients in the communities we serve.
2. Improve the efficiency and effectiveness of our care teams to enhance operating margins and the patient experience.
3. Assess and optimize our clinical resources to better serve our patients and communities.
4. Create an environment of financial accountability throughout the organization.



## *Goal 5– Equity*

### **We will foster an equitable organization for staff, patients and families through inclusion, education, and empowerment.**

1. Build organizational Diversity, Equity, Inclusion capacity and embed equity and inclusion amongst staff and board members through training and development activities.
2. Create a DEI Committee that serves as an equity "think tank" that includes staff, board members and community members.
3. Strengthen Community engagement & advocacy through education and outreach.
4. Develop, implement, and nurture governance membership that is reflective and representative of the diverse communities we serve.



## *Goal 6 –Development*

### **We will create a comprehensive development plan to engage donors, legislators, community members and encourage philanthropic support.**

1. Increase community engagement and awareness of our services by implementing a sustainable marketing/branding and communication plan.
2. Create a comprehensive fund development plan that includes individual donations, grants, planned giving, events, programming and other activities to encompass methods and channels of giving.
3. Serve as an advocate for our clients and gain support for the public programs and policy that contributes to removing barriers and improving their overall health and well-being.
4. Build stronger and deeper relationships and collaborations with like-minded organizations/academic partners to leverage our individual strengths to best meet the social health needs of our community.

# Communication

Heartland Health Services steadfastly believes that strategic plans and processes only work when they are embraced by all employees and the Board and are integrated into each decision and action.

Communication of the strategic plan will be a constant, enhancing the understanding of the mission and vision. The strategic plan will be communicated through face-to-face interactions, electronic, and print media.

The strategic plan is the framework that all employees and governance will use for creating their planning processes and day-to-day work. It is a “living” document that will be monitored quarterly, reviewed annually, and updated every three years.



# Acceptance & Approval

The plan represents the commitment of the Board to the mission, vision, values, and organizational goals and strategies. The Board recognizes that active governance and oversight are required, and the staff is committed to the plan's implementation with quarterly tracking and alignment with Heartland Health Services' performance management systems for additional accountability.

**The Board of Directors of Heartland Health Services approved the strategic plan on**

August 23, 2021.

Action Plan Priority Areas:

Quality  
Team  
Development  
Growth & Expansion  
Finance  
Equity

*(Detail Attached)*





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