



Guiding our Efforts

2023  
through  
2025

# Strategic Plan Supporting Healthy and Fulfilled Lives

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## Letter of Introduction

Dear Friends,

On behalf of the Board of Trustees and entire Bluebonnet Trails Community Services Team, we are proud to present our **2023-2025 Strategic Plan Supporting Healthy and Fulfilled Lives**. This plan is the culmination of provocative discussions and thoughtful efforts with our family members, community partners and community stakeholders interested in developing and expanding access to healthcare in Central Texas. In response to the knowledge gained through these discussions and efforts, each year our Board of Trustees assesses and aligns the direction of Bluebonnet Trails Community Services.

During our Annual Board Retreat on July 22, 2022, the Board of Trustees and Executive Leadership Team for Bluebonnet Trails Community Services considered the relevance and resonance of our Vision, Mission, Values and expectations within the Strategic Plan. With the goal of intentionally advancing as a system of excellence, we define the strategies within this three-year plan and commence monitoring our progress. Through this strategic plan, we commit our efforts in service to Central Texans.

For more information about Bluebonnet Trails Community Services, visit [www.bbtrails.org](http://www.bbtrails.org) or join us on social media through Facebook, Twitter and Instagram. As ever, we thank you for your continued interest, engagement, debate and support allowing us to advance as a system of excellence toward achieving our vision of *healthy and fulfilled lives*.

*Roxanne Nelson*  
Chair, Board of Trustees

*Andrea Richardson*  
Executive Director

In response to the Texas Health and Safety Code Chapter 533, Bluebonnet Trails Community Services was established on September 1, 1997 as a unit of local government. As a unit of local government, the eight volunteer members of the Board of Trustees are appointed by the Commissioners Courts of Bastrop, Burnet, Caldwell, Fayette, Gonzales, Guadalupe, Lee and Williamson Counties in service to Central Texans. We concentrate our efforts and funds in the delivery of early childhood intervention, developmental disability care, autism treatment, mental health services, substance use treatment and primary healthcare.

Through the Texas Health and Human Services Commission (HHSC), Bluebonnet Trails Community Services reaches Texans in 32 counties and is designated as:

- The local mental health authority (LMHA) and local intellectual and developmental disability authority (LIDDA) in 8 counties including Bastrop, Burnet, Caldwell, Fayette, Gonzales, Guadalupe, Lee and Williamson Counties. For these Central Texas counties, HHSC has certified Bluebonnet Trails Community Services as a Certified Community Behavioral Health Clinic (CCBHC). Also for these counties, we are accredited through the National Committee for Quality Assurance (NCQA).
- The Outreach, Screening, Assessment and Referral (OSAR) entity for substance addiction services for 30 counties in HHSC Region 7 including Bastrop, Bell, Blanco, Bosque, Brazos, Burleson, Burnet, Caldwell, Coryell, Falls, Fayette, Freestone, Grimes, Hamilton, Hays, Hill, Lampasas, Lee, Leon, Limestone, Llano, Madison, McLennan, Milam, Mills, Robertson, San Saba, Travis, Washington and Williamson Counties.
- The Early Childhood Intervention (ECI) provider for 6 counties including Bastrop, Burnet, Caldwell, Fayette, Lee and Williamson Counties.
- The Autism Treatment provider for 10 counties including Bastrop, Burnet, Caldwell, Fayette, Gonzales, Guadalupe, Hays, Lee, Travis and Williamson Counties.

This Bluebonnet Trails Team is widely known for these extraordinary opportunities made available through HHSC, but these contracted programs tell only a portion of our story. What is highlighted through our outcomes is the character of our Team Members and valued Partners as catalysts for change. Our goal is not to “fix” problems but to inspire and educate families in ways they may best sustain healthy lives in their home community. We choose to amplify our efforts beyond the successes of a single program offering an integrated system of care made stronger through strategic partners with like-minded missions in service to others.

During Fiscal Year 2022, Bluebonnet Trails Community Services provided care to over 37,000 individuals funded through an annual budget over \$69 million. Bluebonnet Trails Community Services provides a comprehensive array of healthcare services at 32 locations in Central Texas. Anticipating continued growth in our communities surrounding the metropolitan areas of Austin and San Antonio, services are offered to babies, children, adults and families recognizing and respecting needs based on age, language, gender, ethnicity, culture and ability to pay for the services. We focus our efforts on recruiting, deploying and growing the talents and expertise of 601 employees to fill the gaps in health care needs for Central Texans.

## Our Vision, Mission and Statement of Values

Driven by our Board of Trustees, and reviewed annually during the Board Retreat, the following captures the interconnectedness of the vision, mission and values held by Bluebonnet Trails Community Services serving as the guideposts for our strategic planning efforts.



## Our Commitment

Since 1997, Bluebonnet Trails Community Services has been serving Central Texans with a growing array of healthcare services. Our history establishes the foundation and is the building block upon which we construct our future in healthcare delivery. Bluebonnet Trails Community Services commits to a trauma-informed system of care sensitive to the cultural competencies respectfully engaging the persons we serve, our employees and our communities. As we intentionally grow, we integrate the lessons of our past with the reality of our present and the vision for the future. Our future is informed by the needs of our communities which drive the vision and mission embraced by our Board of Trustees—and brought to life by our Team members.

Effective leadership guides achievement of our mission. Through talented collaborators, advisers and supporters, Bluebonnet Trails Community Services has a deep and evolving understanding of the issues of the day resulting in innovative problem-solving and transformational strategic planning. We are guided by the following principles dedicated to leadership-building and succession planning carrying forward the vision of this center:

- Our organizational functions align to optimize our mission and the experience of the persons we serve.
- Our organizational design promotes person-centered care, cross-agency collaboration and stewardship.
- Resources are identified from efficiencies of operations and are redeployed to enhance care or expand capacity.
- The organizational design supports no wrong door access.
- Program and leadership roles and accountability should be easily identifiable by all, including the public.
- We prioritize advancing team members into leadership roles when strengths are demonstrated and opportunities are identified, building a strong succession plan.
- The agency’s leadership structure is intentionally organized to support effective oversight of talent and accomplishment of the vision and mission of the center.

At Bluebonnet Trails Community Services, we are committed and willing to transform our operations to support the changing healthcare needs of the families and communities we serve. To meet our commitment, we strive to provide person-centered services, steeped in evidence-based practices with the voice of the individual and family receiving services in our planning efforts. Within our policies and procedures, that commitment becomes action ensuring each member of this Team understands what is needed and expected as a valued, knowledgeable Team member. Our policies and procedures are the first steps in our plan operationalizing our vision for an integrated and holistic approach to services. In doing so, we know we need to overcome these obstacles in our constantly changing healthcare environment:

- Sometimes we do the right thing, but we do not capture the written process to share the knowledge.
- Sometimes what we have written down is outdated and no longer reflects our current operations.
- Sometimes our operations need to be changed, and new standards need to be documented.

In our commitment to operational excellence, we must be clear in our strategic plan, policies and procedures explaining why we do things; how we do things; and the reason it matters. It must be clear to every member of our staff, every person we serve, and anyone in the community who has an interest in our work.

This Bluebonnet Trails Community Services Team is focused on a common mission. To strengthen that focus through a common understanding of expectations and practices, we actively pursue opportunities bolstering our system of care. Highlighting our ability to demonstrate excellence in service delivery, Bluebonnet Trails Community Services was certified by the Texas Health and Human Services Commission as a Certified Community Behavioral Health Clinic (CCBHC) during 2017. During 2018 and 2021, the Center was awarded federal grant funding expanding the CCBHC model of care through the Substance Abuse and Mental Health Services Administration (SAMHSA).

We have gained meaningful experience as a CCBHC; through studied processes for certification as a Rural Health Clinic (RHC); and through successful accreditation by the National Committee

for Quality Assurance (NCQA) and the Commission on Accreditation of Rehabilitation Facilities (CARF). As a result, we build upon our success across all programs through accreditation; community partner expansion; legislative goals and education; and other funding opportunities supporting the valued principles of the certification.

## Strategic Plan Overview – Supporting Healthy and Fulfilled Lives

The Bluebonnet Trails Community Services Strategic Plan Supporting Healthy and Fulfilled Lives communicates clear expectations for the Center operation during fiscal years 2023 through 2025. Each year during the Annual Board Retreat, progress toward the achieving our mission and strategies is reviewed monitoring our accomplishments, challenges and identified gaps in local healthcare services. As a result, this strategic plan is updated annually based on the identified healthcare needs within our communities and our resources available or necessary to fill the gaps in healthcare. The ultimate goal of this strategic plan is to empower and engage persons choosing to commit to recovery, learning, personal growth and healthy living through an accessible and integrated system of care offered through Bluebonnet Trails Community Services.

The following table represents the four strategic domains we monitor demonstrating our progress in advancing as a system of excellence. The four domains and associated metrics guide our progress. Our progress is reported to our Board of Trustees and staff during each Board meeting and quarterly staff meeting to ensure alignment of effort by an informed Team.

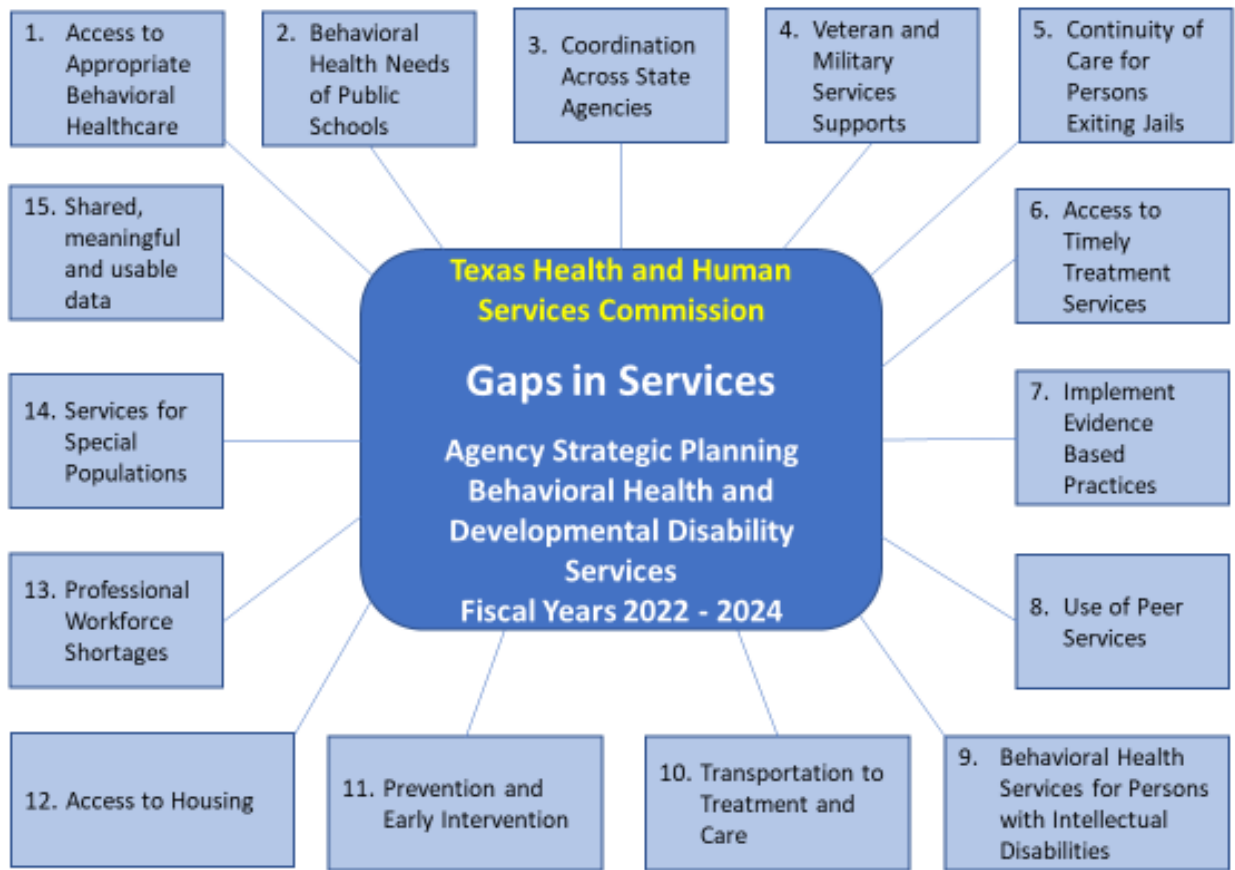
## Strategic Planning Domains





# Strategies, Targets and Crosswalk to Texas Health and Human Services Commission Strategic Plan

Within the Texas Health and Human Services Commission strategic planning process, the agency identified fifteen critical gaps within statewide services. Throughout our communities, community members and stakeholders respond to surveys conducted by the Texas Health and Human Services Commission alongside local community needs assessments conducted by health districts, local hospital systems and regional healthcare partnerships. To that end, a comprehensive list of gaps in services is articulated for consideration within this strategic plan. The following graphic from the Texas Health and Human Services Commission Strategic Plans for Fiscal Years 2019-2023 guides our strategies for this same time frame.



## Strategic Planning Progress and Measurement

As the identified gaps mirror those in our communities, Bluebonnet Trails Community Services intentionally aligns our strategies with the gaps within the statewide system of care, fostering a collaborative and progressive response to identified needs. To that end, the following table offers the intersection of our strategies with the statewide gaps in healthcare services through the Texas Health and Human Services Commission.

| <b>Vision</b>   | Healthy and Fulfilled Lives  |   |   |  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |
|---|--|---|---|--|---|---|---|---|---|---|---|---|----|----|----|----|----|----|
| <b>Mission</b>  | Continuously shaping and investing in a system of care valued by our communities, designed to improve the health and independence of the persons we serve. |   |   |  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |
| <b>Measuring our success toward advancing as a system of excellence</b> |  |   |   |  |   |   |   |   |   |   |   |   |    |    |    |    |    |    |
| Domain  | Measuring Progress and Success   | Target  | Target Range  | HHSC Identified Gap in Services for Texans |   |   |   |   |   |   |   |   |    |    |    |    |    |    |
|   |  |   |   | 1  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| <b>1. Access to Care</b>  | 1.1. Percent of individuals who receive their initial intake within 10 business days of initial contact  | > or = 65%  | All Service lines aligned with CCBHC expectations - from first phone call to first contact.   | X  | X |   | X | X | X | X | X | X | X  | X  | X  |    | X  | X  |
|   | 1.2. No Show Rate  | < or = 25%  | Average monthly no-show rate for clinical staff.  | X  | X | X | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  |
|   | 1.3. Achieve defined productivity measurement for each service line as defined by productivity expectations  | > or = 50% YTD<br>Generally representing at least 50% of all time during a workday is in direct service to individuals receiving services | 100% - Cumulative Year-to-Date measure of Staff meeting or exceeding expectations.  | X  | X |   | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  |
|   | 1.4. Contain of Staff Turnover Ratio   | <20%  | Turnover Rate, annualized.  | X  | X |   | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  |
|   | 1.5. Effective Service Coordination under Medicaid Managed Care  | Improve over FY 2022 baseline by 10%  | Identify one of the NCQA measures demonstrating an increase in coordination and participation in a person's requested services on their Person-Directed Plan (PDP). | X  |   | X | X | X | X | X |   | X | X  | X  | X  |    |    | X  |



**Measuring our success toward advancing as a system of excellence**

| Domain                               | Measuring Progress and Success   | Target  | Target Range   | HHSC Identified Gap in Services for Texans |   |   |   |   |   |   |   |   |    |    |    |    |    |    |   |
|--------------------------------------|--|---|--|--|---|---|---|---|---|---|---|---|----|----|----|----|----|----|---|
|                                      |  |   |  | 1  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |   |
| <b>2. Effective Service Delivery</b> | 2.1. Customer service satisfaction scores using center wide tool                 | > or = 85%  | Compiled scores across all satisfaction surveys.   | X  | X | X | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  | X |
|                                      | 2.2. Percentage of persons served with a designated Primary Care Physician (PCP) | > or = 85%  | Customer Service Reps (CSRs), Case Managers, Care Coordinators and Service Coordinator will ensure individuals served who have a PCP designated in their medical record. | X  | X |   | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  | X |
|                                      | 2.3. Achieve outcome of measures reported through 1115 Waiver DPP-BHS            | 100%  | Performance rate above targets set for all measures.   | X  | X | X | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  | X |
|                                      | 2.4. Workforce Consideration: Caseload Sizes                                     | > or = 50% First Year   | Staff achieving defined caseload size:<br># staff with defined caseload sizes meeting caseload size /<br># staff with an expectation of a caseload size.                 | X  | X |   |   |   | X | X | X | X |    | X  |    |    |    | X  |   |
|                                      | 2.5. Workforce Consideration: Engagement Training                                | 100%<br><br>Reporting progress each month, with achievement by year end | Staff trained:<br># staff provided engagement training / # staff designated to receive engagement training.  | X  | X |   | X | X | X |   |   | X | X  |    | X  | X  | X  | X  |   |

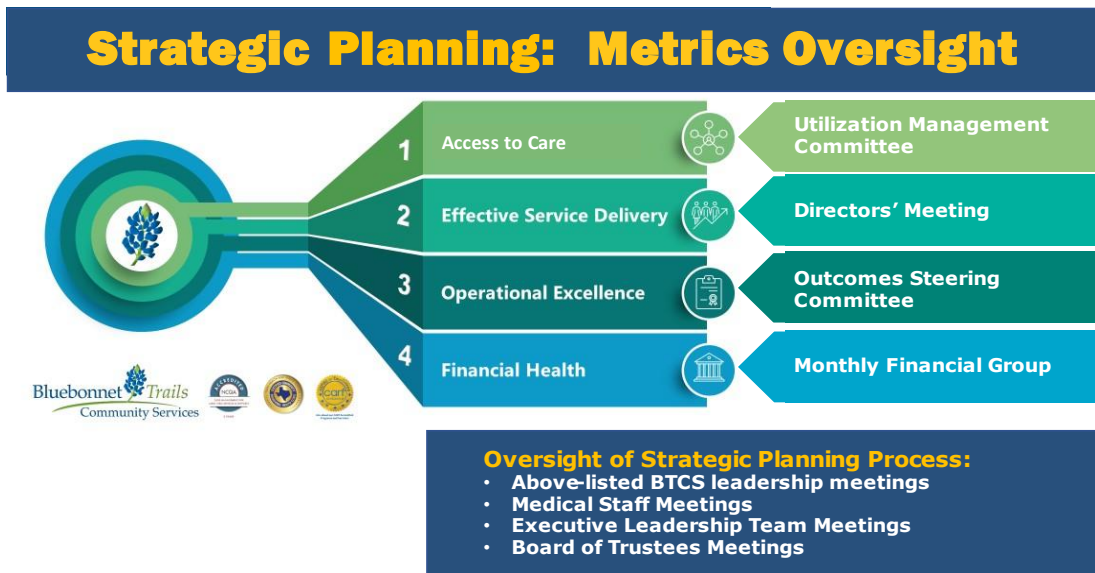
Measuring our success toward advancing as a system of excellence

| Domain                    | Measuring Progress and Success  | Target                                 | Target Range  | HHSC Identified Gap in Services for Texans |   |   |   |   |   |   |   |   |    |    |    |    |    |    |
|---------------------------|---|--|---|--|---|---|---|---|---|---|---|---|----|----|----|----|----|----|
|                           |   |  |   | 1  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 3- Operational Excellence | 3.1. Workforce Development – Recognizing Staff Efforts and Maintaining a Competitive Edge           | 100%                                   | Containment of Staff Turnover Ratio under Access to Services.<br><br>Measured by the percentage of monthly staff appreciation plan objectives that are completed for recognizing staff efforts.<br><br>The percentage of salary & benefits comparison reviews that are completed annually and semi-annually for maintaining a competitive edge. | X  |   | X |   |   |   | X | X |   |    | X  |    |    | X  | X  |
|                           | 3.2. Metrics demonstrate progress toward Operational Excellence as reviewed by oversight committees | Achieving aggregate targets > or = 95% | Demonstrating achievement of established targets for outcomes and process metrics overseen by the respective BTCS oversight committees.   | X  | X | X | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  |

Measuring our success toward advancing as a system of excellence

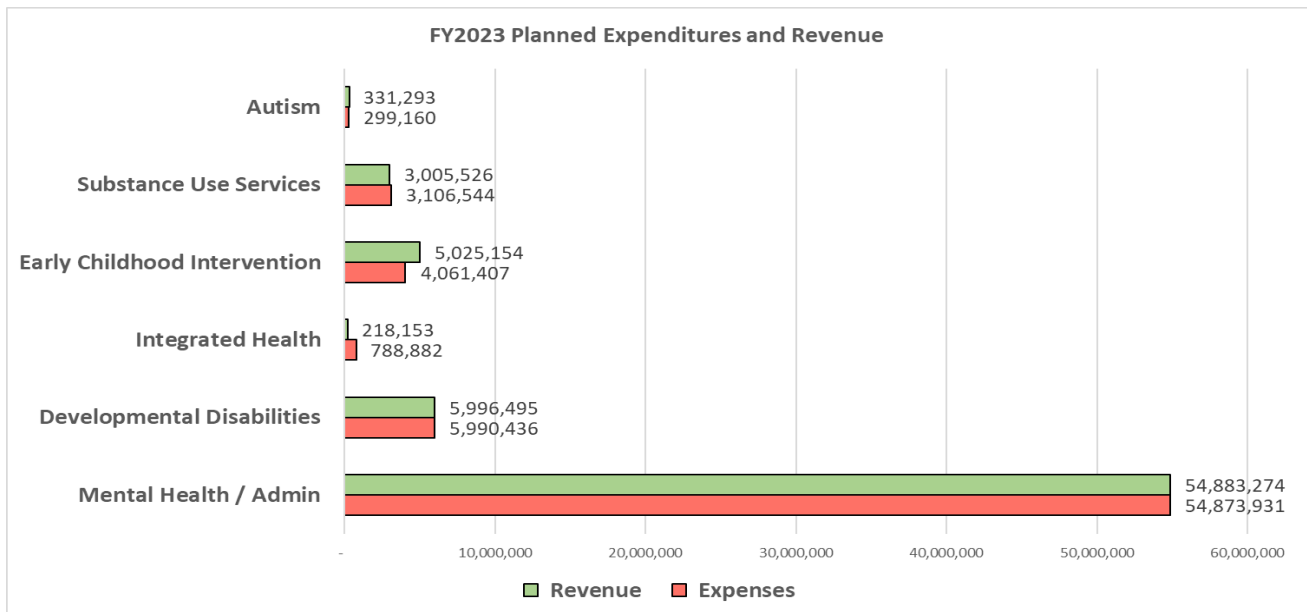
| Domain              | Measuring Progress and Success  | Target   | Target Range   | HHSC Identified Gap in Services for Texans |   |   |   |   |   |   |   |   |    |    |    |    |    |    |   |
|---------------------|---|--|--|--|---|---|---|---|---|---|---|---|----|----|----|----|----|----|---|
|                     |   |  |  | 1  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |   |
| 4. Financial Health | 4.1. Budget Margins, year to date   | 100%   | At least 100%, as adjusted by Board of Trustees.   | X  | X | X | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  | X |
|                     | 4.2. increased earned revenues  | \$5,933,338  | Based on FY 2022 revenue, increase needed to meet or exceed earned revenue budgeted amounts for FY 2023.   | X  | X | X | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  | X |
|                     | 4.3. Days of Operation in Cash and Investments                                  | 90 Days  | 90 days of reserves target set by the Board.   | X  | X | X | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  | X |
|                     | 4.4. Indirect Costs   | < or = 11.25% Improve upon FY 2022 Admin Overhead percentage | Target based on state community Center averages; also known as administrative overhead.  | X  | X | X | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  | X |
|                     | 4.5. Optimizing Medicaid Opportunities: Achieving Projected Margins for DPP-BHS | > or = budgeted FY 2023 DPP-BHS revenue                      | Quarterly DPP actual payments compared to budgeted amounts.  | X  | X |   |   |   | X | X |   | X |    | X  |    | X  | X  | X  | X |
|                     | 4.6. Optimizing Medicaid Opportunities: Achieving Projected Margins for PHP-CCP | > or = FY 23 Budgeted Revenue                                | PHP CCP measure: Establish estimated dollar value after the first quarter of FY 23 with the revised charity care based cost report; Update the estimate quarterly. | X  | X |   |   |   | X | X |   | X |    | X  |    | X  | X  | X  | X |
|                     | 4.7. Optimizing Reimbursement for Virtual Services                              | 100% Quarterly Measurement                                   | Number of virtual services billed and number virtual services paid. Expressed as a number and percent. Remove not yet processed claims.                            | X  | X | X | X | X | X | X | X | X | X  | X  | X  | X  | X  | X  | X |

To ensure timely oversight of our progress toward achieving our strategic goals, the following oversight structure is underway for Bluebonnet Trails Community Services:



## Planned Expenditures and Revenues – Fiscal Year 2023

Considering the anticipated cost of the resources to successfully deploy our strategies, the Board of Trustees approved the Fiscal Year 2023 budget plan totaling \$69,120,361. The initial budget plan was discussed and approved by the Board during the Annual Board Retreat conducted on July 22, 2022, and represents a positive balance of planned revenues over expenses in excess of \$339,535.



This budget was created calculating the average revenues and expenses during the previous service year impacted by the COVID-19 pandemic. As a result, the FY 2023 budget is reflective of

the productivity experienced during the second year of the pandemic. This budget plan will be influenced by the upcoming Texas 88<sup>th</sup> Legislative Session, with the regular session, January 10, 2023 through May 29, 2023.

Realized revenues over expenses at the end of Fiscal Year 2023 will be invested in our reserve fund balance (40% of total); in recognition of our employees (40% of total); and in maintaining the quality of our infrastructure (20% of total).

The budget is approved by the Board of Trustees and will continue to be assessed on a quarterly basis for consideration of adjustments based on experience.

Envisioning *healthy* and *fulfilled lives*.



[www.bbtrails.org](http://www.bbtrails.org)

Administration: 1009 North Georgetown Street | Round Rock, Texas 78664

24-Hour Crisis Line: 800-841-1255

For Appointments or Questions about our Services: 844-309-6385