Behavioral Health Plan – FY23-FY25 (FY24 Budget)

The internal Ballad annual operating and capital budget concludes by no later than June 30th of each year in time for the start of next fiscal year on July 1st.

The annual operating and capital budget is not final until being approved by the Ballad board of directors, which currently occurs at the August board meeting.

The Tennessee Department of Health and the Virginia Department of Health requested KPIs and Targets for this Plan to assist the states with monitoring Ballad's progress towards meeting its minimum annual incremental spending commitment. The KPIs and Targets in this Plan are intended to serve as reference points only and Ballad shall not be penalized for failing to meet a specific KPI or Target if the spending associated with the approved Plan is met by the end of the Fiscal Year.

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New 3-Year Plan: FY23 – FY25 Summary

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

Strategy Approved by TDH/VDH in Current Plan	Strategy Remains for FY23-FY25?	Specific initiatives	FY 23	FY 24	FY 25	Budgeted Spend in FY23	Budgeted Spend in FY24	Estimated Spend in FY25
Strategy #1 – Develop the Ballad Health Behavioral Services Infrastructure: Service line leadership	Yes- Further delineation of strategy from initial 3-year plan	• Continue and build Behavioral Health infrastructure	X	X	X	$2,312,557	**$3,293,469**	$3,500,000
Strategy #1 – Develop the Ballad Health Behavioral Services Infrastructure: Workforce retention and development for healthcare community	Yes- Further delineation of strategy from initial 3-year plan	• Support academic programs for mental health professionals • Expand mental health resources for health care professionals	X X	X X	X X	$528,805	**$1,763,869**	$2,000,000
Strategy #2 – Develop a Comprehensive Approach to the Integration of Behavioral Health and Primary Care Integration	Yes	• Optimization and expansion of current integrated sites	X	X	X	$474,240	**$484,389**	$500,000
Strategy #3 – Supplement Existing Regional Crisis System For Youth and Adults	Yes	• Optimization of inpatient and support services • Expand community programs • Expand Outpatient Services	X X X	X X X	X X X	$4,755,694	**$7,374,202*** C- $3,607,342	$4,250,000
Strategy #4 – Develop Enhanced and Expanded Resources for Addiction Treatment	Yes	• Expansion of Addiction Treatment Services • Expansion of Recovery Ecosystem	X X	X X	X X	$917,712	**$3,210,346*** C- $60,000	$3,000,000
Strategy #5 – Behavioral Health Telehealth Implementation - NEW	Yes	• Optimize and expand telehealth services	X	X	X	$385,518	**$879,017*** C- $50,000	$1,000,000
Total Spend						$9,374,526	**$17,005,292*** C- $3,717,342	$14,250,000

Final FY24 Plan Budgets

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Strategy #1: Develop the Ballad Health Behavioral Services Infrastructure: Service Line Leadership

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Continue and build Behavioral Health Infrastructure
 	
FY23: $2,312,557
FY24: $3,293,469
	• Maintain current staffing and operations (recurring spend of salary and benefits) - **$3,293,469**
	• Hire the following positions:
	  • Backfill Chief Medical Officer role (moving to 0.6FTE) (Q1 FY23)
	    • Cost may also include engaging a recruiting firm due to lack of candidates COMPLETE
	  • Post Data Analyst position (1.0 FTE) (Ongoing from FY23 plan)
	    • Resource will collect and analyze data to drive improvements in patient flow, operational efficiencies to expand access, and support development of outpatient services
	  • Repost Marketing position (0.5 FTE) (Ongoing from initial 3-year plan)
	  • Repost Clinical Educator (1.0 FTE) (Ongoing from FY22 plan) COMPLETE
	  • Repost Outreach Manager (1.0 FTE) (Ongoing from initial 3-year plan)
	  • Post Reimbursement Specialist and/or engage reimbursement consultant (1.0 FTE) (Q1 FY24)
	
	• Evaluate needs for growth
		• Y/N
		
		• CMO hired
		
		• Data Analyst hired Y/N
		
		• Clinical Educator hired Y/N
		
		• Y/N
			• Y/N
			
			• Data Analyst hired Y/N
			• Marketing position hired Y/N
			• Outreach manager hired Y/N
			
			• Reimbursement Specialist/Consultant retained Y/N
			
			• Y/N

FY23 Budget
Continue and build Behavioral Health Infrastructure- $2,312,557
$2,312,557

FY24 Budget
Continue and build Behavioral Health Infrastructure- $3,293,469
$3,293,469

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Strategy #1: Develop the Ballad Health Behavioral Services Infrastructure: Workforce Development

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Support academic programs for mental health professionals
 	
FY23: $427,555
FY24: $1,605,419
	Child/Adolescent Psychiatry Fellowship at ETSU (tied to HR/GME plan)- **$97,000**
	• Implementation of operational plan at ETSU (Q3 FY23) (Ongoing from FY23 plan)
	  • We believe that for a successful application, this partnership will require up to a year for Accreditation Council for Graduate Medical Education (ACGME) review, hiring plan development, space needs assessment and offers to the first class of fellows.
	• Hiring of Faculty and Staff (Q4 FY23) (Ongoing from FY23 plan)
	  • Hire Consult Liaison attending
	  • Recruitment and supply cost
	
	❖ Behavioral Health will be responsible for operational expenses and HR/GME will be responsible for academic expenses
		• Plan developed and initiated Y/N
		• Clinic location identified Y/N
		• Acute Care training locations identified Y/N
		• ACGME Application submitted Y/N
		• ACGME Approval of new program Y/N
		• # of offers made to Faculty and Staff
		
		• Evaluation complete Y/N
		
		• Evaluation results submitted to states
			• Plan developed and initiated Y/N
			• Clinic location identified Y/N
			• Acute Care training locations identified Y/N
			• ACGME Application submitted Y/N
			• ACGME Approval of new program Y/N
			
			• Consult Liaison attending hired Y/N

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Strategy #1: Develop the Ballad Health Behavioral Services Infrastructure: Workforce Development

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continued- Support academic programs for mental health professionals FY23: $427,555 **FY24: $1,605,419**	Further expansion of the Addiction Medicine Fellowship (tied to HR/GME plan)- Ongoing Operational Expense **$1,435,864** • Identification of clinical facility for rotational model in SWVA (Q2 FY23) COMPLETE • Hiring of Faculty and Staff (Q3 FY23) (Ongoing from FY23 plan) • Additional Addictionologist, Therapist, Case Manager, Nurse, and Certified Peer Recovery Specialist • Identification of new space to house Addiction Medicine Fellowship and provide clinic operations (Q1 FY24) ❖ Behavioral Health will be responsible for operational expenses and HR/GME will be responsible for academic expenses	• Clinical facility identified Y/N • Offers made to faculty and staff Y/N • # of faculty and staff hired (will list position detail)	• Clinical rotation started Y/N • Offers made to faculty and staff Y/N • # of faculty and staff hired (will list position detail) • New clinical facility identified Y/N
	Support academic programs for mental health therapy professionals- **$72,555** • Sponsor 5 students with scholarships to further support expansion of outpatient services, will include a 1-year commitment (Ongoing yearly expense from FY23 plan) • Scholarship candidates would include Bachelor/Master of Social Work, Counseling, Psychology or Mental Health related field.	• # of students identified • # of contracts executed	• # of students identified • # of contracts executed

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Strategy #1: Develop the Ballad Health Behavioral Services Infrastructure: Workforce Development

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expand mental health resources for health care professionals FY23: $101,250 **FY24: $158,450**	Develop additional mental health resources to support internal and external healthcare workforce as recommended by Clinical Council • Implement Schwartz Rounds program open to all community healthcare providers (Q3 FY23) (Ongoing from FY23 plan) **– Operational expense $83,450** • Structured program to provide caregivers a forum to share and discuss social and emotional issues they face in caring for patients and families. • Explore and implement online Mental Wellness platform to allow for internal and external providers to anonymously access professionally moderated group support and on demand resources for healthcare professionals (Q4 FY23) (Ongoing from FY23 plan) - Operational expense **$75,000**	• Listing of Facilities identified • Program implemented Y/N • # of participants per Schwartz session • Vendor identified Y/N • Program implemented Y/N • # of active users/month • #of sessions/month	• Listing of Facilities identified • Program implemented Y/N • # of participants per Schwartz session • Vendor identified Y/N • Program implemented Y/N • # of active users/month • #of sessions/month

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Strategy #1: Develop the Ballad Health Behavioral Services Infrastructure: Workforce Development

FY23 Budget

Child/Adolescent Psychiatric Fellowship-	$5,000
Expansion of Addiction Medicine Fellowship-	$350,000
Student Scholarships-	$72,555
Total Academic programs support-	*$427,555*
Schwartz Rounds-	$76,250
Online Mental Wellness-	$25,000
Total Mental health resource expansion-	*$101,250*
	$528,805

FY24 Budget

Child/Adolescent Psychiatric Fellowship-	$97,000
Expansion of Addiction Medicine Fellowship-	$1,435,864
Student Scholarships-	$72,555
Total Academic programs support-	*$1,605,419*
Schwartz Rounds-	$83,450
Online Mental Wellness-	$75,000
Total Mental health resource expansion-	*$158,450*
	$1,763,869

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Strategy #2: Develop a Comprehensive Approach to the Integration of Behavioral Health and Primary Care

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Optimization and expansion of current integrated sites
 	
FY23: $474,240
FY24: $484,389
	• Evaluate demand and add additional human resources at current sites as needed (ongoing from initial 3-year and FY22 plan) Ongoing Operational Expense - **$484,389**
	
	• Evaluate the need for additional integrated sites, develop and implement plans for expansion as needed (Q3 FY23) (Ongoing from FY23 plan)
	   • Add Psychiatrist in SWVA (1.0 FTE)(Q1 FY24)
	   • Hire Behavioral Health Nurse (LPN) in SWVA (1.0 FTE)(Q1 FY24)
		• Staff hired from FY22 plan?
		   • 1 FTE in Greeneville Y/N
		   • 1 FTE in Elizabethton Y/N
		   • 1 FTE in Norton Y/N
		   • 1 FTE in Rural Retreat Y/N
		
		• Evaluation completed Y/N
		• Plan developed Y/N
		• # of new team members hired
		• # of visits with Behavioral Health providers per site / month
			• # of new team members hired
			• # of visits with Behavioral Health providers per site / month
			
			• Psychiatrist hired Y/N
			
			• LPN hired Y/N

FY23 Budget

Total Behavioral Health integrated site infrastructure- $474,240

FY24 Budget

*Total Behavioral Health integrated site infrastructure- **$484,389***

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Strategy #3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Optimization of Inpatient and Support Services FY23: $1,816,110 **FY24: $2,654,944*** **C: $1,000,000**	Respond Expansion (Crisis assessment/patient flow services)- Ongoing Operational Expense **$213,252** • Maintain staffing and operations (ongoing from initial 3-year and FY22 plans) • Hire FTEs to support operational growth as needed	• # of crisis assessments performed /month • # of calls handled/month	• # of crisis assessments performed /month • # of calls handled/month • # of new FTEs hired
	Transportation services (ongoing from initial 3-year plan)- Ongoing Operational Expense **$351,994** • Maintain staffing and current operations of transport services (ongoing) • Purchase additional van (Q3 FY23) COMPLETE • Hire 2 additional FTEs (Q3 FY23) COMPLETE	• Y/N • Van purchased • FTEs hired Y/N • # of transports completed /month	• Y/N • # of transports completed /month

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

Final FY24 Plan Budgets

BalladHealth

Strategy #3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continued- Optimization of Inpatient and Support Services FY23: $1,816,110 **FY24: $2,654,944*** **C: $1,000,000**	SBIRT (ongoing from initial 3-year and FY22 plans)- Ongoing Operational Expense **$504,491** • Maintain staffing and operations as described in previous plans (ongoing)	• Y/N • # of filled positions • # of vacant positions • Increase the number of SBIRT screenings by 10% above FY22 Y/N	• Y/N • # of filled positions • # of vacant positions • Increase the number of SBIRT screenings by 10% above FY23 Y/N
	24/7 Walk-in at Woodridge (Projected Operational loss)- **$316,584** • Complete construction and open services (Q2 FY23) COMPLETE • Hire walk-in support staff (4.0 FTE) FY24	• Construction complete • Services operational • Serve a minimum of 100 walk in patients per month Y/N • # of patients seen per month	• Serve a minimum of 100 walk in patients per month Y/N • # of patients seen per month • Staff hired Y/N

C - Capital Plan Budgeted Spend
*** Includes capital and operational expense**

Final FY24 Plan Budgets

BalladHealth™

Strategy #3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continued- Optimization of Inpatient and Support Services FY23: $1,816,110 **FY24: $2,654,944*** **C: $1,000,000**	Care Coordinators for post discharge follow up- Ongoing operational expense **$98,844** • Hire staff to support discharge follow up post psychiatric hospitalization • Hire 2 FTEs (Q3 FY23) COMPLETE • Maintain staffing and operations (FY24)	• Hire staff Y/N • Improvement of 7 day follow up metrics to exceed baseline of 33.3% Y/N • Improvement of 30 day follow up metrics to exceed baseline of 58.6% Y/N	• Improvement of 7 day follow up metrics to exceed baseline of 33.3% Y/N • Improvement of 30 day follow up metrics to exceed baseline of 58.6% Y/N
	• Build Behavioral Health Case Management Team –Operational expense **$169,778** • Post position for a Behavioral Health Case Manager II to perform system wide catastrophic case management (1.0 FTE) (Q1 FY24) • Post position for a Manager, PRM Behavioral Health for Virginia (1.0 FTE) (Q1 FY24) • Evaluate and implement behavioral health case managers as needed to support patients in the ED and acute care settings		• Team members hired Y/N (will list position detail)

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

Final FY24 Plan Budgets

BalladHealth

Strategy #3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Expand Community Programs
 	
FY23:$416,216
FY24: $1,100,366
	Implement school-based behavioral health support systems- **$331,662**
	• Create Critical Incident Stress Management (CISM) response team to deploy to school settings as necessary Ongoing operational expense - **$131,662**
	  • Hire 2 FTEs (Q3 FY23) (Ongoing from FY23 plan)
	• Pilot Stress Relief Lounges in school-based settings (Q2 FY23) COMPLETE
	  • Environmental resources (couch, reading material, lighting, music)
	  • Training for student and volunteer peer support
	• Expand Stress Relief Lounges to 3 additional school systems (Phased approach throughout FY24) –Operational expense plus supplies **$200,000**
	  • Environmental resources (couch, reading material, lighting, music)
	  • Training for student and volunteer peer support
	  • Contract with partner to provide resiliency training
		• CISM staff hired Y/N
		• # of incident responses/month
		
		• Pilot site identified Y/N
		• # of students and volunteers trained
			• CISM staff hired Y/N
			• # of incident responses/month
			
			• # of sites
			• # of students and volunteers trained

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Strategy #3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Continued- Expand Community Programs
 	
FY23: $416,216
FY24: $1,100,366
	Sexual Assault Nurse Examiner (SANE) Program- provides post trauma care and emotional support- Ongoing operational expense **$199,388**
	• Maintain staffing and operations for SANE program (ongoing from FY23 plan)
	   • Hire SANE Nurse Manager
	   • Hire SANE RN
		• # of nursing FTE's hired
		• Pilot site identified Y/N
			• # of nursing FTE's hired

	Community Navigators for Pediatric Crisis Support- Ongoing operational expense **$192,858**
	• Implement pediatric crisis support system
	• Hire 4 FTEs to support the following locations (Q4 FY23) (Ongoing from FY23 plan)
	• Pediatric Emergency Departments
	   • Johnson City, TN (1 FTE)
	   • Kingsport, TN (1 FTE)
	   • Bristol, TN (1 FTE)
	• All other Emergency Departments (1 FTE)
		• Staff hired Y/N
		• # of kids served
			• Staff hired Y/N
			• # of kids served

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Strategy #3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continued- Expand Community Programs FY23: $416,216 **FY24: $1,100,366**	Partner with Frontier Health to form an Intensive Treatment Team (FY24) – Operational expense **$376,458** • Program to identify/address root causes and care coordination for behavioral health patients with high recidivism rates • Identify and enroll patients in the program		• # of patients enrolled • Decrease ED visits by 50% for enrollees • Decrease IP psychiatric hospitalization by 50% for enrollees

Expand Outpatient Services
 	
FY23: $2,523,368
FY24: $4,618,893*
C: $3,607,342
	• Development of Outpatient campus Johnson City, TN- Multiyear project- capital expense plus operational expense (expense minus revenue)
	  • Open new dedicated child/adolescent outpatient clinic with Intensive Outpatient Services- capital and operating expense (Q4 FY23) (Ongoing from FY23 plan) – Capital **$1,282,302;** Operational **$281,022**
	    • Hire staff to support service (Q3 FY24)
	      • Child/Adolescent Psychiatrist (2.0 total FTE)
	      • Advanced Practice Providers (2.0 FTE)
	      • Therapists
	      • Support Staff
	    • Add Transcranial Magnetic Stimulation (TMS) as a new service
	  • Relocate and expand current adult outpatient clinic to provide added capacity and Intensive Outpatient Services- capital and operating expense (Q4 FY23) (Ongoing from FY23 plan) - Capital **$1,825,040**; Operational **$51,539**
	    • Psychiatrist (2.0 FTE) (Q3 FY24)
	    • Advanced Practice Providers (2.0 FTE) (Q3 FY24)
	    • Hire additional staff to meet demand
	• Evaluation of additional specialized behavioral health services
		• Construction on schedule Y/N
		• Staff hired Y/N
		• Set clinic volume baseline in FY24 and increase by 25% in FY25 Y/N
		
		• Construction on schedule Y/N
		• Staff hired Y/N
		• Increase clinic volumes in FY24 by 50% over FY22 volumes Y/N
		• Evaluation complete Y/N
			• Construction on schedule Y/N
			• Staff hired Y/N
			• Set clinic volume baseline in FY24 and increase by 25% in FY25 Y/N
			• # of TMS procedures/month
			
			• Construction on schedule Y/N
			• Staff hired Y/N
			• Increase clinic volumes in FY24 by 50% over FY22 volumes Y/N
			• Evaluation complete Y/N

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

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Strategy #3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Continued - Expand Outpatient Services
 	
FY23:$2,523,368
FY24: $4,618,893*
C: $3,607,342
	• Open Outpatient Behavioral Health clinic in Bristol FY24 - Capital **$500,000** and Operational Expenses **$73,440**
	• Hire Staff to support services (Q4 FY24)
	   • Psychiatrist (0.5 FTE)
	   • APP (1.0 FTE)
	   • Therapist (1.0 FTE)
	   • Support Staff (1.0 FTE)
			• Clinic open Y/N
			• # of clinic visits per month

	Maintain staffing and operations at new and incremental outpatient clinics approved in previous plans – Operational Losses **$605,550** (FY24)
	   • Kingsport
	   • Greeneville
	   • Rogersville
	   • Big Stone Gap
	• Add staff as needed to scale services to meet demand
			• # of additional staff hired Y/N (will list position detail)
			• # of visits per site / month

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

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Strategy #3: Supplement Existing Regional Crisis System

FY23 Budget

Respond Services-	$204,525
Transportation Services-	$324,414
SBIRT-	$111,398
Completion of 24/7 Walk-in-	$1,109,623
Care Coordinators-	$66,150
Optimization of Inpatient and Support Services-	*$1,816,110*
School based support systems-	$201,487
SANE-	$64,804
Gambling Addiction-	$56,000
Pediatric Community Navigators-	$93,925
Expand Community Programs-	*$416,216*
OP Clinic in Norton-	$149,250
New Child/Adolescent Clinic in JC-	$1,049,003
Adult Expansion with IOP in JC-	$1,325,115
Expand Outpatient Services-	*$2,523,368*
	$4,755,694

FY24 Budget

Respond Services-	$213,252
Transportation Services-	$351,994
SBIRT-	$504,491
WPH 24/7 Walk-in additional supporting staff-	$316,584
Care Coordinators-	$98,844
Behavioral Health Case Management team-	$169,778
Optimization of Inpatient and Support Services-	*$1,654,943*
School based support systems (CISM & Stress Relief Lounges)-	$331,662
SANE-	$199,388
Pediatric Community Navigators-	$192,858
Intensive Treatment Team-	$376,458
Expand Community Programs-	*$1,100,366*
New Child/Adolescent Clinic in JC- capital-	$1,282,302
New Child/Adolescent Clinic in JC- operational-	$281,022
Adult Expansion with IOP in JC-	$1,825,040
Adult Expansion with IOP in JC- operational-	$51,539
OP Clinic in Bristol-	$573,440
Ongoing Operating Loss Expansion Clinics-	$605,550
Expand Outpatient Services-	*$4,618,893*
$7,374,202*
C: $3,607,342

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

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Strategy #4: Develop Enhanced and Expanded Resources For Addiction Treatment

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expansion of Addiction Treatment Services FY23: $855,068 **FY24: $2,890,703*** **C: $60,000**	STRONG Futures (Greeneville Women's Recovery Project)- Ongoing Operating Loss- **$2,561,535** • Maintain staffing & operations of current Outpatient Clinic & Living Center (ongoing from initial 3-year and FY22 plans) ❖ Operational loss assumes current funding sources only. The team will continue to work to identify alternative funding sources such as grants, philanthropy, and improved contracting rates for covered services.	# of unduplicated families served # of mothers/children utilizing the Living Center	# of unduplicated families served # of mothers/children utilizing the Living Center
	Strong Futures Outpatient Expansion – Operating Loss **$219,168** (FY24) • Kingsport, TN (Q2 FY23) (Ongoing from FY23 plan) • Hire 4 FTEs	• Morristown clinic open Y/N • Kingsport clinic open Y/N • Staff onboarded Y/N	• Kingsport clinic open Y/N • Staff onboarded Y/N
	Expansion of services at Overmountain Recovery in Gray, TN- Capital expense **$60,000** • Hire second physician (Q2 FY23) (Q1 FY24) • Hire additional staff to support growth as needed • Expand into adjoining suites via phased approach to allow for volume growth (existing BH Admin and Respond suites) - capital and operational expense (Q3 FY23) (ongoing from FY23 plan)	• Physician hired Y/N • APPs hired Y/N • Construction complete Y/N • Grow clinic volume by 25% over FY22 baseline Y/N	• Physician hired Y/N • # of additional staff hired • Construction complete Y/N • Grow clinic volume by 10% over FY23 baseline Y/N

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

BalladHealth

Strategy #4: Develop Enhanced and Expanded Resources For Addiction Treatment

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continued- Expansion of Addiction Treatment Services FY23: $855,068 **FY24: $2,890,703*** **C: $60,000**	Pilot MAT Initiation in the ED setting Educate and roll out in phased approach • Pilot at JCMC (Q4 FY23)- This location was selected due to proximity to several MAT clinics interested in this initiative, and the proximity and interest of the ETSU Addiction Medicine Fellowship to be involved in the program • Expand to all Ballad EDs in a phased approach in FY24 • Naloxone Distribution – work with Population Health to develop a strategy based on highest need (Operational Expense) **$50,000**	• Pilot (JCMC) complete Y/N • # of patients discharged with a bridge order for suboxone	• Pilot (JCMC) complete Y/N • # of EDs implemented • # of patients discharged with a bridge order for suboxone • # of Naloxone kits distributed

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

Final FY24 Plan Budgets

BalladHealth

Strategy #4: Develop Enhanced and Expanded Resources For Addiction Treatment

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expansion of Recovery Ecosystem FY23: $62,644 **FY24: $319,643**	Invest in Recovery Housing projects - **$100,000** Develop Recovery Housing Strategy Partner as needed- focus on housing for strong futures population		

	Peer Recovery Specialists embedded into Inpatient Psychiatric settings - Ongoing Operational Expenses **$144,643**
	• Embed Certified Peer Recovery Specialists (Q2 FY23)
	   • Woodridge Poplar Unit (TN) – 2 FTEs (carry over to Q1 FY24)
	   • Ridgeview (VA) – 1 FTE
		• CPRS on boarded Y/N	• CPRS on boarded Y/N

	Host a Recovery Symposium focused on prevention, addiction treatment, and recovery ecosystem – Operational Expense **$75,000**		• Planning complete Y/N • # of attendees

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Strategy #4: Develop Enhanced and Expanded Resources for Addiction Treatment

FY23 Budget

Strong Futures Greeneville Operational Losses-	$389,111
Strong Futures Expansion OP sites-	$433,313
Expansion of Overmountain Recovery-	$30,000
MAT Initiation in ED-	$2,644
Expansion of Addiction Treatment Services-	*$855,068*
Expansion of Recovery Ecosystem-	*$62,644*
	$917,712

FY24 Budget

Strong Futures Greeneville Operational Losses-	$2,561,535
Strong Futures Expansion OP sites-	$219,168
Expansion of Overmountain Recovery(capital)-	$60,000
Naloxone distribution-	$50,000
Expansion of Addiction Treatment Services-	*$2,890,703*
Invest in Recovery Housing Projects-	$100,000
Peer Recovery Specialists-	$144,643
Recovery Symposium-	$75,000
Expansion of Recovery Ecosystem-	*$319,643*
$3,210,346*	
C- $60,000	

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

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Strategy #5: Behavioral Health Telehealth Implementation

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Optimize and expand telehealth services
 	
FY23: $385,518
FY24: $879,017*
C: $50,000
	Provide Psychiatric Consult Liaison (C/L) services Ongoing Operational Expenses **$829,017**
	• Contract with a telehealth Vendor to provide C/L services in the hospital settings- capital and new operational expense
	  • Replace and expand current limited C/L service within tertiary hospital settings (Q1 FY23) COMPLETE
	  • Add new C/L services to community hospital settings (Q2 FY23) COMPLETE
	  • Begin planning for building internal structure to provide Consult Liaison services
	  • Hire staff as needed
		• Contract executed Y/N
		• CL services -tertiary Y/N
		• CL services community Y/N
		• 90% of consults seen within 24 hours Y/N
			• 90% of consults seen within 24 hours Y/N
			• # of new TMs hired

	Telehealth in PC/BH Integrated sites- • Cost of IT equipment to roll out telehealth to existing PC/BH integrated clinic COMPLETE	• Y/N • # of tele visits completed/month	
	Add telehealth options for Behavioral Health Outpatients- Capital expense **$25,000** • Implement telehealth in all behavioral health clinics (Q4 FY23)(Ongoing from FY23 plan)	• Telehealth implemented Y/N • Increase tele visits by 10% Y/N	• Increase tele visits by 5% over FY23 Y/N
	Telehealth School based initiatives- Capital expense **$25,000** • Choose School / School System for tele-behavioral pilot (Q2 FY23) COMPLETE • Purchase IT equipment • Hire staff as needed to support services • Develop workflow for tele-behavioral (Q2 FY23)(Ongoing from FY23) • Implement tele-behavioral (Q4 FY23) (Ongoing from FY23 plan) • Scale tele behavioral services to interested school systems	• Pilot site identified Y/N • Services launched Y/N • # of students served	• # of sites implemented • # of staff hired • # of students served

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

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Strategy #5: Behavioral Health Telehealth Implementation

FY23 Budget

Psychiatric Consult Liaison- $280,518
Telehealth PC/BH Integration- $10,000
Telehealth in all OP Behavioral Health clinics- $75,000
Telehealth School Based Initiatives- $20,000
$385,518

FY24 Budget

Psychiatric Consult Liaison ongoing expense- $829,017
Telehealth in all OP Behavioral Health clinics- $25,000
Telehealth School Based Initiatives- $25,000
$879,017*
C-$50,000

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

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Children's Health Plan – FY23-FY25 (FY24 Budget)

The internal Ballad annual operating and capital budget concludes by no later than June 30th of each year in time for the start of next fiscal year on July 1st.

The annual operating and capital budget is not final until being approved by the Ballad board of directors, which currently occurs at the August board meeting.

The Tennessee Department of Health and the Virginia Department of Health requested KPIs and Targets for this Plan to assist the states with monitoring Ballad's progress towards meeting its minimum annual incremental spending commitment. The KPIs and Targets in this Plan are intended to serve as reference points only and Ballad shall not be penalized for failing to meet a specific KPI or Target if the spending associated with the approved Plan is met by the end of the Fiscal Year.

New 3-Year Plan: FY23 – FY25 Summary

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

Strategy Approved by TDH/VDH in Current Plan	Strategy Remains for FY23-FY25?	Specific Initiatives	FY 23	FY 24	FY 25	Budgeted Spend in FY23	Budgeted Spend in FY24	Estimated Spend in FY25
Strategy #1: Develop Necessary Ballad Children's Health Services Infrastructure to support the Niswonger Children's Health Network that improve safety, quality, and efficiency in care	Yes	• Support Miracle Field in Kingsport • Develop strategies for increased physician engagement throughout the Ballad Health service area • Support Network expansion • Childcare Expansion	X X X	X X X X	X X X X	$1,546,112	**$7,954,493**	$1,972,119
Strategy #2: Create environments for children and families within Ballad Health that promote a family-centered delivery system, alleviate family health-care burden, and promote resiliency and opportunity for families we serve	New	• Expand the Niswonger Pediatric complex care program	X	X	X	$47,580	**$120,600**	$120,600
Strategy #3: Develop Telemedicine and Rotating Specialty Clinics In Rural Hospitals	Yes	• Determine gaps in subspecialty services • Work in conjunction with telehealth service line to develop project plan for expansion (Partnerships = B) • Utilize ETSU in plans for further expanding telehealth coverage • Evaluate post-inpatient telehealth needs	X X X X	X X X X	X X X X	$160,000	**$437,000** **C-$277,000**	$437,000

BalladHealth

New 3-Year Plan: FY23 – FY25 Summary

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

Strategy Approved by TDH/VDH in Current Plan	Strategy Remains for FY23-FY25?	Specific Initiatives	FY 23	FY 24	FY 25	Budgeted Spend in FY23	Budgeted Spend in FY24	Estimated Spend in FY25
Strategy #4: Recruit and Retain Subspecialists	Yes	• Recruit targeted subspecialties • Evaluate partnerships to eliminate coverage gaps	X X	X X	X X	$6,965,670	**$5,711,274**	$5,711,274
Strategy #5: Assess, Align and Implement Strategies to Improve Pediatric Trauma Care Delivery and Prevention	Yes	• Develop project plan for pediatric quality improvement • Determine educational resources needed for trauma prevention • Focus program development on prevention of non-accidental trauma in children • Maintain current pediatric trauma program	X X X X	X X X X	X X X X	$215,000	**$221,000**	$221,000
Total Spend						$8,934,362	**$14,444,367**	$8,461,993

Final FY24 Plan Budgets

BalladHealth™

Strategy #1: Develop Necessary Ballad Children's Health Services Infrastructure to Support the Niswonger Children's Health Network That Improve Safety, Quality, and Efficiency In Care

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Maintain and evaluate additional resources needed for support of network expansion FY23: $1,446,112 **FY24: $1,704,493**	• Maintain infrastructure • Data analytics (1.0 FTE) COMPLETE • NsCN Quality Coordinator (1.0 FTE) • NsCN AVP Program Operations (1.0 FTE) Replace director of CRC with a manager level position COMPLETE • NsCN Director of Clinical Services (1.0 FTE) COMPLETE • Reallocate clinical specialist FTE to NICU –position unfilled from FY22 COMPLETE • Nursing Supervisor (1.0 FTE) COMPLETE • Medical Social Worker (1.0 FTE) COMPLETE • Pediatric Pharmacy Specialist • Marketing and Communications Coordinator	• Hired Y/N	• Hired Y/N
Miracle Field FY23: $50,000 **FY24: $0**	• Support Miracle Field in Kingsport, TN COMPLETE	• Investment made Y/N - FY23 only **Per amendment approval:** • Ballad Health will report annual utilization statistics for the Miracle Field to both states using information provided by the city of Kingsport • Ballad Health will provide both states with an update on any projects added to the Miracle Field each year based on information provided by the city of Kingsport	• Investment made Y/N - FY23 only **Per amendment approval:** • Ballad Health will report annual utilization statistics for the Miracle Field to both states using information provided by the city of Kingsport • Ballad Health will provide both states with an update on any projects added to the Miracle Field each year based on information provided by the city of Kingsport

Strategy #1: Develop Necessary Ballad Children's Health Services Infrastructure to Support the Niswonger Children's Health Network That Improve Safety, Quality, and Efficiency In Care

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Develop strategies for increased physician participation in quality improvements efforts for the Niswonger Children's Network FY23: $50,000 **FY24: $50,000**	• Formalize plan for community physician participation opportunities in data submission and outcome measures • Determine medical director for quality COMPLETE	• Develop 2 quality projects involving community physicians Y/N • Medical Director Hired Y/N	• Develop 2 quality projects involving community physicians Y/N
Childcare Expansion **FY24: $6,200,000**	• Operationalize first centers • Develop plans for next centers • Fully implement community/regional partnerships		• At least 2 centers fully operational Q2 • Plans developed for at least 3 additional centers Q4 • 3 partnerships developed Q3

FY23 Budget

Infrastructure- $1,544,754
Miracle Field- $50,000
Physician quality- $50,000
$1,546,112

FY24 Budget

Infrastructure- $1,704,493
Physician quality- $50,000
Childcare Expansion- $6,200,000
$7,957,493

BalladHealth

Strategy #2: Create Care Environments for Children that Promote a Family-Centered Approach to Delivery and that Help Alleviate Healthcare Burden

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expand the Niswonger pediatric complex care program FY23: $47,580 **FY24: $120,600**	• Increase patient enrollment in the service COMPLETE • Hire 1.0 FTE community health worker for the service COMPLETE • Hire 1.0 FTE RN for the service	• Ballad Health will enroll 70 children in the complex care program in FY23 • Ballad Health will increase enrollment 30% above FY 23 enrollment by FY25 Y/N • Hired Y/N	• Ballad Health will increase enrollment 30% above FY 23 enrollment by FY25 Y/N • Hired Y/N

FY23 Budget
Complex care program- $47,580
$47,580

FY24 Budget
Complex care program- $120,600
$120,600

BalladHealth

Strategy #3: Develop Telemedicine and Rotating Specialty Clinics in Rural Hospitals

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Expand telehealth support for women and children in the Ballad Health service area
 	
FY23: $60,000
FY24: $337,000*
C: 277,000
	• Perform gap assessment for subspecialty coverage
	• Expand school based telemedicine, setting a goal of 5 new school systems
	• Formulize expansion plan in targeted services
	   • Expand teleneonatology to all delivery hospitals
	   • Evaluate opportunities for post inpatient telehealth support
	   • Expand subspecialty telehealth coverage in rural markets
		• Assessment performed Y/N
		• Plans formalized Y/N
		• Gap analysis supplied to states Y/N
		• Expand telehealth to a minimum of two sites, one being in Virginia
			• Assessment performed Y/N
			• Plans formalized Y/N
			• Gap analysis supplied to states Y/N
			• Expand telehealth to a minimum of two sites, one being in Virginia
			• School MOU agreements signed
			• Number of schools enrolled >or= 5

Actively engage in strategic partnership opportunities for providing telehealth support for children's services (to include but not limited to Vanderbilt, Cincinnati children's Hospital, LeBonheur, and/or UVA) FY23: $100,00 **FY24: $100,000**	• Explore and establish opportunities for partnership in providing telehealth support	• Establish one formal partnership for telehealth support Y/N	• Establish one formal partnership for telehealth support Y/N

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

FY23 Budget	
Telehealth support-	$60,000
Explore partnerships-	$100,000
	$160,000

FY24 Budget	
Telehealth support-	$337,000
Explore partnerships-	$100,000
	$437,000

BalladHealth

Strategy #4: Recruit and Retain Subspecialists

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Open recruitment for gaps in subspecialty coverage and retention of existing providers FY23: $6,965,670 **FY24: $5,711,274**	• Pediatric neurology (0.8 clinical FTE plus academic support) COMPLETE • Pediatric radiology (Support to Mountain Empire Radiology) • Pediatric anesthesia (1 full anesthesia team) • Pediatric pulmonology (0.8 clinical FTE plus academic support) COMPLETE • Pediatric nephrology (0.8 clinical FTE plus academic support) • Pediatric rheumatology (0.5 clinical FTE plus academic support) COMPLETE • Pediatric urology (CCHMC agreement) • Geneticist (faculty assistance agreement) COMPLETE • Child abuse prevention practitioner • Developmental behavioral pediatrician (faculty assistance agreement) • Adolescent medicine specialist (faculty assistance agreement) • Clinical Psychologist (ETSU support) • APP practice support (1.0 FTE for BHMA) • Retain previously recruited/contracted physicians COMPLETE	Specialty coverage obtained: • Pediatric neurology Y/N • Pediatric radiology Y/N • Pediatric anesthesia Y/N • Pediatric pulmonology Y/N • Pediatric nephrology Y/N • Pediatric rheumatology Y/N • Pediatric urology Y/N • Geneticist Y/N • Child abuse prevention practitioner Y/N • Developmental behavioral pediatrician Y/N • Adolescent medicine specialist Y/N • Clinical Psychologist Y/N • APP practice support Y/N • Retain previously recruited/contracted physicians Y/N	Specialty coverage obtained/maintained: • Pediatric neurology Y/N • Pediatric radiology Y/N • Pediatric anesthesia Y/N • Pediatric pulmonology Y/N • Pediatric nephrology Y/N • Pediatric rheumatology Y/N • Pediatric urology Y/N • Geneticist Y/N • Child abuse prevention practitioner Y/N • Developmental behavioral pediatrician Y/N • Adolescent medicine specialist Y/N • Clinical Psychologist Y/N • APP practice support Y/N • Retain previously recruited/contracted physicians Y/N

FY23 Budget	FY24 Budget
$6,965,670	**$5,711,274**

Final FY24 Plan Budgets

BalladHealth

Strategy #5: Assess, Align and Implement Strategies to Improve Pediatric Trauma Care Delivery and Prevention

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Develop project plan for pediatric quality improvement FY23: $0 **FY24: $0**	• Assign to project manager COMPLETE • Formulate project team • Develop plan for data collection and benchmarks	• Assigned Y/N • Team formed Y/N • Plan developed Y/N	• Team formed Y/N • Plan developed Y/N
Determine educational resources needed for trauma prevention FY23: $0 **FY24: $0**	• Identify improvement opportunities • Work within Ballad Health service area to provide trauma focused education resources	• Opportunities identified Y/N • Resources provided Y/N • # and detail for education resources identified that are needed for trauma prevention	• Opportunities identified Y/N • Resources provided Y/N • # and detail for education resources identified that are needed for trauma prevention
Focus program development on prevention of non-accidental trauma in children FY23: $0 **FY24: $0**	• Continue work with regional committee • Post child abuse prevention practitioner program • Develop region wide prevention strategies	• Work continued Y/N • Program Developed Y/N • Strategies developed Y/N • Updates on and stats for programs and strategies shared at quarterly meetings	• Work continued Y/N • Program Developed Y/N • Strategies developed Y/N • Updates on and stats for programs and strategies shared at quarterly meetings

BalladHealth

Strategy #5: Assess, Align and Implement Strategies to Improve Pediatric Trauma Care Delivery and Prevention

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continue current pediatric ED infrastructure FY23: $215,000 **FY24: $221,000**	• Maintain current trauma program and Pediatric ED manager	• Maintained Y/N • Status provided during each quarterly meeting	• Maintained Y/N • Status provided during each quarterly meeting

FY23 Budget	FY24 Budget
$215,000	**$221,000**

BalladHealth

Rural Health Plan – FY23-FY25 (FY24 Budget)

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The Tennessee Department of Health and the Virginia Department of Health requested KPIs and Targets for this Plan to assist the states with monitoring Ballad's progress towards meeting its minimum annual incremental spending commitment. The KPIs and Targets in this Plan are intended to serve as reference points only and Ballad shall not be penalized for failing to meet a specific KPI or Target if the spending associated with the approved Plan is met by the end of the Fiscal Year.

BalladHealth

New 3-Year Plan: FY23 – FY25 Summary

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

Strategy Approved by TDH/VDH in Current Plan	Strategy Remains for FY23-FY25?	Specific Initiatives	FY 23	FY 24	FY 25	Budgeted Spend in FY23	Budgeted Spend in FY24	Estimated Spend in FY25
Strategy #1: Recruit Primary Care Physicians and Mid-Levels to Practices in Counties of Greatest Need	Yes	• Continue recruitment efforts of key identified primary care	X	X	X	$760,746	**$916,276**	$4,074,044
Strategy #2: Recruitment of Physician Specialists to Meet Rural Access Needs	Yes	• Continue recruitment efforts of key identified specialists in our rural markets • Evaluation of outreach needs	X X	X X	X X	$1,015,718	**$4,433,321*** **C:$195,000**	$1,238,485
Strategy #3: Implement Team-Based Care Models to Support Primary Care Providers, Beginning with Pilots in High Need Counties	Yes	• Enhance pod infrastructure • Implement Team-Based Care (TBC) in our Peds Specialties	X X	X X	X X	$552,660	**$500,200**	$0
Strategy #4: Develop and Deploy Virtual Care Services	Yes	• Integrated system-wide virtual health platform • Expand Virtual Urgent Care • Identification of Virtual Consultation Services • Establish new Tele-neurology system platform • Carter County Ambulance	X X X 	X X X X X	X X X X 	$767,000	**$1,780,810*** **C:$199,221**	$298,000
Strategy #5: Coordinate Preventive Health Care Services (VDH Specific Strategy)	Yes	• Streamline preventive procedures and diagnostic tests	X	X	X	$8,676	**$15,133**	$8,676
Total Spend						$3,104,800	**$7,645,740**	$5,619,205

Final FY24 Plan Budgets

BalladHealth

Strategy #1: Recruit Primary Care Physicians and Mid-Levels to Practices in Counties of Greatest Need

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Continue recruitment efforts of key identified primary care providers in our rural markets
 	
FY23: $760,746
FY23 projected details below:
MD (2)
APP (3)
Women's Health APP (2)
 	
FY24: $916,276
	• Recruit new primary care clinicians to counties of greatest need (FY23-FY25): Potential counties identified below:
	 • **Virginia**
	  • Buchanan County
	  • Dickenson County
	  • Smyth County
	  • Washington County
	  • Wythe County
	 • **Tennessee**
	  • Hamblen County COMPLETE
	  • Hawkins County
	  • Cocke County
	• Recruit Women's Health APP in the following counties:
	  • Wise County, VA COMPLETE
	  • Washington County, VA
	
	• Evaluate potential site options and construction build for non-established counties with $0 in FY23 and then $3.4M per year for construction in FY24 & FY25 (subject to detailed budgeted plans and approval as an amendment).
		• Sign LOIs with 5 clinicians to start in FY23 and/or FY24 (State and county detail will be provided) with start dates as they occur
		
		• Date Construction started
		• Date Construction completed
			• Sign LOIs with 2-3 clinicians to start in FY24 and/or FY25 (State and county detail will be provided) with start dates as they occur
			
			• Date Construction started
			• Date Construction completed

FY23 Budget	FY24 Budget
$760,746	$916,276

Final FY24 Plan Budgets

BalladHealth

Strategy #2: Recruitment of Physician Specialists to Meet Rural Access Needs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Continue recruitment efforts of key identified specialists in our rural markets
 	
FY23: $1,015,718
General Surgery MD
General Surgery APP
Pulmonary/CC MD
Pulmonary/CC APP
GYN Oncologist MD
Cardiologist MD
Neurologist MD
Sports Medicine MD
 	
FY23 Targeted LOIs:
General Surgery APP
Pulmonary/CC APP
Neurologist MD
 	
FY24 Targeted LOIs:
General Surgery MD
Sports Medicine MDs (2)
Wound Care APPs (2)
Urologist MD
GYN Oncologist MD
Cardiologist MD
Pulmonary/CC APP
 	
FY24: $4,433,321*
C: $195,000
C - Capital Plan Budgeted Spend
* Includes capital and operational expense
	• General Surgery APP in Greene County, TN COMPLETE
	• General Surgeon(s) in Smyth County, VA COMPLETE
	• Pulmonary/Critical Care
	   • Physician in Washington County, VA
	   • Establish APP in Carter County, TN COMPLETE
	• Infectious Disease physician
	   • Telehealth consults in rural counties
	• GYN Oncologist
	• Cardiologist for Greene County, TN COMPLETE
	• Neurologist in Washington County, VA
	• Sports Medicine physician in Wise County, VA COMPLETE
	
	• Wound Care APP in Smyth County, VA
	• Wound Care APP in Wise County, VA
	• Urologist in Sullivan County, TN (Kingsport)
	• Sports Medicine physician in Washington County, TN (Johnson City)
	• Pulmonary/Critical Care APP in Washington & Russell County, VA
	• Women's Health Clinic Move in Smyth County, VA
		• Sign LOIs with 3 Incremental clinicians to start in FY23 and/or FY24 (state and county detail will be provided) with start dates as they occur
		
		• Date Construction started
		• Date Construction completed
			• Sign LOIs with 3 Incremental clinicians to start in FY24 and/or FY25 (state and county detail will be provided) with start dates as they occur
			
			• Date Construction started
			• Date Construction completed

Strategy #2: Recruitment of Physician Specialists to Meet Rural Access Needs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Evaluation of outreach needs	• Complete Physician Needs Assessment (PNA) Ballad Health will be updating the Provider Needs Assessment in FY23. At the conclusion of that work, Ballad Health will update the table showing the provider needs by county and the corresponding targets COMPLETE	• Complete PNA • PNA provided to states when completed	

FY23 Budget	FY24 Budget
$1,015,718	$4,433,321* C:$195,000

C - Capital Plan Budgeted Spend
***** **Includes capital and operational expense**

BalladHealth

Strategy #3: Implement Team-Based Care Models to Support High Need Counties

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Enhance TBC infrastructure
 	
FY23: $552,660
FY24 – $1,437,200
 	
Enhance pod infrastructure - $341,600
FY24 – $341,600
 	
Implement TBC in our Peds Specialties - $211,060
FY24 – $158,600
	• Enhance pod infrastructure
	  • Clinical Pharmacist
	  • Evaluate additional outreach opportunities to assist patients with gap closure and annual visits to their Primary Care Physician PCP COMPLETE
	• Increase Care Management services
	  • In collaboration with Ballad One Care Management Structure, evaluate additional care management services required to meet the needs of our vulnerable patient population and reduce avoidable ED and IP Utilization
	• Implement TBC in Peds Specialties
	  • Hire Behavioral Health Psychologist
		• Hire 3 additional staff in FY23 Y/N
		• TBC Program established
		• 25% increase in annual wellness visits - 20,562
		• Behavioral Health Psychologist volume
			• Hire 3 additional staff in FY24 Y/N
			
			• 10% increase in annual wellness visits
			
			• TBC Program established
			
			• Behavioral Health Psychologist volume

FY23 Budget
Enhance pod infrastructure- $341,600 TBC in Peds specialties- <u>$211,060</u> $552,660

FY24 Budget
Enhance pod infrastructure- $341,600 TBC in Peds specialties- <u>$158,600</u> **$500,200**

BalladHealth™

Strategy #4: Develop and Deploy Virtual Care Services

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Integrated system-wide virtual health platform FY23: $469,000 **FY24: $199,221** **C: $199,221**	• Optimize usage of integrated system-wide virtual health platform among Ballad providers	• Purchased telehealth carts (67) • # of telehealth carts in use with locations	• Purchased telehealth carts (67) • # of telehealth carts in use with locations
Expand Virtual Urgent Care FY23: $270,000 **FY24: $903,575**	• Implement virtual urgent care strategy that leverages Point of Care Testing in our brick-and-mortar locations COMPLETE • Evaluate the need to convert and/or expand an existing UC location to 8p-8a to establish a 24/7 Urgent Care (FY23) COMPLETE • Establish 24/7 Virtual Urgent Care	• Y/N • Achieve 2,400 or more virtual urgent care visits	• Y/N • Achieve 2,400 or more virtual urgent care visits
Identification of Virtual Consultation Services FY23: $28,000 **FY24: $28,000**	• Evaluate and identify locations for telehealth pods for consultation services	• Establish 4 telehealth pods for consultation/telehealth services	• Establish 4 telehealth pods for consultation/telehealth services
Establish new Tele-neurology system platform **FY24: $322,088**	• Begin seeing patients on new Tele-neurology system platform		• New Tele-neurology system platform established
Carter County Ambulance **FY24: $327,926**	• Provide financial support to the Carter County Emergency and Rescue Squad, Inc to purchase an additional ambulance to add to the existing fleet		• Funds provided to purchase ambulance

FY23 Budget

Integrated system-wide virtual health platform- $469,000
Expand Virtual Urgent Care- $270,000
Virtual Consultation Services- $28,000
$767,000

FY24 Budget

Integrated system-wide virtual health platform- $199,221
Expand Virtual Urgent Care- $903,575
Virtual Consultation Services- $28,000
Tele-neurology system- $322,088
Carter County Ambulance - $327,926
$1,780,810
C:$199,221

C - Capital Plan Budgeted Spend
* Includes capital and operational expense

BalladHealth

Strategy #5: Coordinate Preventive Health Care Services (*VDH Specific Strategy*)

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Streamline preventive procedures and diagnostic tests FY23: $8,676 **FY24: $15,133**	Establish quarterly health fairs in each market to assist patients in closing identified gaps in care for the following screenings: COMPLETE • Screening Colonoscopies • Women's' Health • Breast Cancer Screenings • Cervical Cancer Screenings • Diabetes Screenings • Hypertension Screenings • Lung Screenings • Calcium Scoring Screenings • Head & Neck Cancer Screenings	• Conduct 16 health fairs; date, location, and screening to be provided	• Conduct 24 health fairs; date, location, and screening to be provided

FY23 Budget
$8,676

FY24 Budget
$15,133

BalladHealth

Population Health - FY23-FY25 (FY24 Budget)

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BalladHealth

New 3-Year Plan: FY23 – FY25 Summary

Strategy Approved by TDH/VDH in Current Plan	Strategy Remains for FY23-FY25?	Specific Initiatives	FY 23	FY 24	FY 25	Budgeted Spend in FY23	Budgeted Spend in FY24	Estimated Spend in FY25
Strategy #1: Develop Population Health Infrastructure within the Health System and the Community	Yes	• Continue and build population health infrastructure	X	X	X	$4,079,696	**$7,290,350*** C- $4,649,480	$4-4,500,000
		• Expand social care integration/system care management through needs referral platform, Community Partner Referral Network and social care/care management workforce	X	X	X			
		• Advance and maintain mPINC	X	X	X			
		• Continue to serve and expand STRONG ACC backbone services	X	X	X			
		• Build a comprehensive contraceptive health strategy, special focus on vulnerable populations	X	X	X			
		• Expand our population health data capacity and capability including Epic's Healthy Planet and Compass Rose	X	X	X			
Strategy #2: Position Ballad Health as a Community Health Improvement Organization	Yes	• Expand STRONG Pregnancies and STRONG Starts	X	X	X	$5,613,534	**$6,320,157**	$5-6,000,000
		• Expand/Maintain Appalachian Highlands Care Network	X	X	X			
		• Expand STRONG LINK (longitudinal study)	X	X	X			
		• Expand Cessation services	X	X	X			
		• Expand early prenatal care services	X					
		• Support breastfeeding initiation across the region	X	X	X			
Strategy #3: Enable Community Resources and Sound Health Policy	Yes	• Strengthen community action through Ballad Health and community-based program investments	X	X	X	$4,068,248	**$3,875,553**	$4-4,500,000
		• Expand mobile services to at-risk women and disparate groups	X	X	X			
		• Support Ballad Health efforts on prevention, early detection and intervention aimed at reducing leading causes of mortality and morbidity	X	X	X			
		• Expand Faith Community Nursing	X					
Total Spend						$13,761,478	**$17,486,060*** C- $4,649,480	$13,000,000-$15,000,000

Strategy #1: Develop Population Health Infrastructure within the Health System and the Community

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continue and build population health infrastructure FY23: $1,440,055 Continuation 2022 $: $1,126,713 salaries; $209,324 operations 2022 Staffing: 9.5 positions 2023 $: $1,026,713 salaries; $413,342 operations ($50,000 allocated to mPINC work) 2023 Staffing: 9.5 positions **FY24: $1,216,216 salaries $186,500 operations**	• Maintain current staffing and operations • Evaluate needs for growth	• Maintain 10 carryover positions • Prepared Needs Assessment Q4	• Maintain 10 carryover positions Q4 • Prepared Needs Assessment Q4

BalladHealth

Strategy #1: Develop Population Health Infrastructure within the Health System and the Community

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expand social care integration/system care management through needs referral platform, Community Partner Referral Network and social care/care management workforce FY23: $811,516 Continuation 2022 $: $0 in salaries; $320,000 in operations 2022 Staffing: 0 2023 $: $411,516 in salaries and $400,000 in operations 2023 Staffing: 7 **FY24: $331,883 salaries** **$283,736 operations**	• Build Universal Social Screening (USS) questions inside Epic COMPLETE • Hire social care navigators COMPLETE • Train internal department/service line teams and develop workflows for use of USS COMPLETE • Expand # of UniteUs community organizations	• USS integrated into Epic Q3 • Hiring and training complete Q2 • 4 facilities activated Q4 • 4 navigators to be hired Q4 • Update of teams trained to be provided at quarterly meetings • 130 in-network community organizations	• 205 in-network community organizations Q4
	• Expand use of Universal Social Screener (USS) throughout inpatient and ambulatory settings • Implement Healthy Planet client management system across social care programs • Build social care integration hub for the system		• Build inpatient system USS workflow Q1 • Build ambulatory system USS workflow Q2 • Begin USS expanded implementation Q3 • USS implemented in 5 service lines/departments Q3 • Healthy Planet client management system adopted by 2 social care programs Q3 • Social Care Integration Hub plan complete Q1 • Hire 2 FTEs for Social Care Integration Hub Q2

Strategy #1: Develop Population Health Infrastructure within the Health System and the Community

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Advance and maintain mPINC FY23: $50,000 New 2022 $: 0 2022 Staffing: 0 2023 $: $50,000 allocation of infrastructure funding 2023 Staffing: 0 **FY24: $0**	• Develop mPINC system guidebook COMPLETE • Distribute guidebook to all L&D leaders COMPLETE • Participate in CDC mPINC 2022 survey COMPLETE • Conduct listening sessions post CDC survey with L&D COMPLETE • Conduct internal mPINC survey with all L&Ds based on CDC survey • Implement quality improvement processes based on findings from survey	• Guidebook produced and distributed Q2 • All L&D sites participating Q3 • All L&D sites participating and output report produced Q3	• Survey completed Q2 • Processes developed Q3 • Processes implemented Q4
Continue to serve and expand STRONG ACC backbone services FY23: $320,435 Continuation 2022 $: $256,535 in salaries and operations 2022 Staffing: 2 2023 $: $320,435 in salaries and operations 2023 Staffing: 3 **FY24: $286,754 salaries $98,992 operations**	• Communicate Ballad's ACC activation plan across system COMPLETE • Continue to fund ACC Executive Director and 1 support staff COMPLETE • Provide operational funding to ACC • Hire additional support staff	• Produce communication checklist and complete communications Q2 • 2 positions retained Q4 • $80,000 provided Q4 • Hire one additional community engagement specialist Q2	• 3 positions retained Q4 • $80,000 provided Q4 • Hire 1 additional community engagement specialist Q2

Final FY24 Plan Budgets

BalladHealth

Strategy #1: Develop Population Health Infrastructure within the Health System and the Community

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Build a comprehensive contraceptive health strategy, special focus on vulnerable populations FY23: $50,000 New 2022 $: 0 2022 Staffing: 0 2023 $: $50,000 in operating funds 2023 Staffing: 0 **FY24: $50,000** **FY24 Staffing: 0**	• Assess current contraceptive health activities/programs internally and with community partners COMPLETE • Use results to build strategic plan COMPLETE • Socialize plan internally and externally for input and buy-in COMPLETE • Implement contraceptive health supports across the region and internally guided by strategic plan • Explore contraceptive device/product purchasing and distribution	• Assessment produced Q2 • Produce strategic plan Q3 • Produce tactical activation report Q4	• Convene community stakeholders to implement supports Q1 • Convene internal stakeholders to implement supports Q1 • Device/product purchase plan complete Q2 • Plan elements implemented Q4

BalladHealth™

Strategy #1: Develop Population Health Infrastructure within the Health System and the Community

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Expand our population health data capacity and capability including Epic's Healthy Planet and Compass Rose
FY23: $1,407,690
 	
New
2022 $: 0
2022 Staffing: 0
2023 $: $134,190 in salaries; $1,273,500 for Healthy Planet and Compass Rose acquisition costs
2023 Staffing: 2
 	
FY24: $178,045 salaries
      $8,744 operations
  C: $4,649,480 Healthy Planet/Compass Rose
	• Begin using Healthy Planet for social care integration/care management
	• Hire a pop health data manager COMPLETE
	• Hire additional data analyst COMPLETE
	• Coordinate with new Chief Analytics Officer to add pop health data capacity COMPLETE
		• Activate use in at least 2 Ballad program areas Q4
		• Hires completed Q2
		• Operational guideline report completed with analytics Q2
		• Updates of position hiring and onboarding to be provided at quarterly meetings
			• Healthy Planet scaled system-wide for social care integration/care management Q4

C - Capital Plan Budgeted Spend

BalladHealth

Strategy #2: Position Ballad Health as a Community Health Improvement Organization

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expand STRONG Pregnancies and STRONG Starts FY23: $2,345,181 Continuation 2022 $: $955,487 in salaries; $148,976 in operations 2022 Staffing: 19 2023 $: $2,037,656; $307,525 in operating 2023 Staffing: 43 **FY24: $2,014,597 salaries** **$252,472 operations**	• Add new pediatric STRONG Starts sites • Launch STRONG support groups COMPLETE • Increase screenings in STRONG Pregnancies • Increase enrollment in STRONG Starts • Hire additional FTEs to support expansion	• Add 3 sites Q4 • Launch 1 group Q4 • 4,800 screenings in STRONG Pregnancies Q4 • 1,300 enrolled in STRONG Starts Q4 • Updates of site onboarding and group launched to be provided at quarterly meetings	• Add 3 new sites Q4 • 9000 screenings in STRONG Pregnancies Q4 • 5000 enrolled in STRONG Starts Q4 • Updates of site onboarding and group launched to be provided at quarterly meetings • 7 FTEs hired Q2
Support breastfeeding initiation across the region (This is <u>not</u> new, but has been broken out of STRONG Pregnancies – budget in FY23 was $219,390 salaries) **FY24: $219,390 salaries** **$50,000** **operations/campaigns**	• Develop awareness campaigns • Explore community breastfeeding supports for increased access • Expand lactation services across the system		• 2 campaigns launched Q4 • Breastfeeding support inventory completed Q2 • Fill vacant lactation positions Q1 • Add 3 new facilities to coverage Q3

BalladHealth

Strategy #2: Position Ballad Health as a Community Health Improvement Organization

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expand/Maintain Appalachian Highlands Care Network FY23: $2,837,328 Continuation 2022 $: $1,028,905 salaries; $743,976 in operations 2022 Staffing: 19 2023 $: $1,894,694 in salaries; $942,634 in operations 2023 Staffing: 42 **FY24: $2,496,127 salaries** **$819,612 operations**	• Increase enrollment • Add sites to network • Add FTEs to support expansion/maintenance and increased enrollment COMPLETE	• 5,000 enrolled Q4 • 1,600 patients enrolled in complex care management • 10 New sites Q4 • New hires Q3 • Updates of site onboarding to be provided at quarterly meetings • Updates of position hiring and onboarding to be provided at quarterly meetings	• 7,000 enrolled Q4 • 3,200 patients enrolled in complex care management Q4 • Fill FY23 vacancies Q4 • Updates of site onboarding to be provided at quarterly meetings

BalladHealth

Strategy #2: Position Ballad Health as a Community Health Improvement Organization

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expand STRONG LINK (longitudinal study) FY23: $50,000 Continuation 2022 $: $20,000 2022 Staffing: 0 2023 $: $50,000 2023 Staffing: 0 **FY24: $75,000**	• Increase study enrollment • Add enrollment sites	• 400 enrolled Q4 • 4 enrollment sites Q4	• 400 enrolled Q4 • 3 enrollment sites Q4
Expand Cessation services FY23: $283,557 Continuation 2022 $: salary $ not provided since only 1 position was funded; $15,000 operations 2022 Staffing: 5 2023 $: $268,557 salaries; $15,000 operations 2023 Staffing: 5 **FY24: $358,351 salaries** **$34,608 operations**	• Add Cessation Counselors • Expand population to adults in BHMA COMPLETE • Develop provider and nurse continuing medical education module (CME) for cessation best practice COMPLETE • Launch continuing medical education course (CME) COMPLETE • Expand to additional populations across the system • Explore purchase and provision of nicotine replacement therapies for clients	• Hire 4 new cessation counselors Q3 • 260 enrolled Q4 • CME content produced Q3 • CME launched Q3 • Curriculum provided to states during Q4	• Hire 3 new cessation counselors Q2 • 900 enrolled Q4 • Update of added populations will be provided at quarterly meetings • Purchase and cost analysis completed Q2

BalladHealth

Strategy #2: Position Ballad Health as a Community Health Improvement Organization

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expand early prenatal care services COMPLETE FY23: $97,468 Continuation 2022 $: Salary $ not provided since only 1 position was funded 2022 Staffing: 1 2023 $: $97,468 2023 Staffing: 2 **FY24: $0**	• Add additional referral partners COMPLETE • Train an additional Early Prenatal Care (EPC) Navigator COMPLETE	• Secure 6 total referral partners Q4 • Training completed Q2 • Updates on new partners to be provided at quarterly state meetings	

BalladHealth

Strategy #3: Enable Community Resources and Sound Health Policy

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Strengthen community action through Ballad Health and community-based program investments FY23: $3,330,486 Continuation 2022 $: $2,500,000 2022 Staffing: 0 2023 $: $3,330,486 2023 Staffing: 0 **FY24: $3,330,000**	• Conduct current site evaluations for potential continuation and/or increased funding • Identify additional promising and best practices	• Site evaluations on all funded organizations complete Q4 • RFPs issued and organizational partnerships evaluated Q4	• Site evaluations on all funded organizations complete Q4 • RFPs issued and organizational partnerships evaluated Q4
Expand mobile services to at-risk women and disparate groups FY23: $458,462 New 2022 $: 0 2022 Staffing: 0 2023 $: $208,092 in staffing; $250,370 in operations 2023 Staffing: 7 **FY24: $226,367 staffing** **$169,186 operations**	• Launch new mobile health unit COMPLETE • Expand mobile services with free clinics and other partners	• Accomplished Q4 • 10 identified partners Q4	• Mobile services will be provided in every county in Ballad's GSA service area Q4

BalladHealth

Strategy #3: Enable Community Resources and Sound Health Policy

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Support Ballad Health efforts on prevention, early detection and intervention aimed at reducing leading causes of mortality and morbidity FY23: $200,000 New 2022 $: 0 2022 Staffing: 0 2023 $: 200,000 2023 Staffing: 0 **FY24: $150,000**	• Launch prevention, early detection/treatment campaigns • Launch process improvement initiatives directed at decreasing mortality and morbidity COMPLETE • Identify initiatives internally and externally that align with reduction of mortality and morbidity and coordinate and support	• 2 campaigns launched or partnerships established Q4 • Develop one improved process each in heart, cancer, and trauma programs Q4	• 2 campaigns launched or partnerships established Q4 • Internal inventory complete Q1 • External partnership inventory complete Q2 • Initiatives prioritized for coordination and support Q3
Expand Faith Community Nursing COMPLETE FY23: $79,300 New 2022 $: 0 2022 Staffing: 0 2023 $79,300 in salaries 2023 Staffing: 5 **FY24: $0**	• Expand Virginia footprint COMPLETE • Expand number of faith-based sites COMPLETE • Integrate Universal Social Screener into program COMPLETE	• At least 1 new VA site Q3 • 5 new sites Q4 • Screener integrated Q2	

Final FY24 Plan Budgets

BalladHealth

Strategy #1: Develop Population Health Infrastructure within the Health System and the Community

FY23 Budget

Population Health infrastructure-	$1,440,055
Expand social care integration/system-	$811,516
Advance/maintain mPINC-	$50,000
Continue to expand STRONG ACC-	$320,435
Build a contraceptive health strategy-	$50,000
Expand population health data capacity-	$1,407,690
	$4,079,696

FY24 Budget

Population Health infrastructure-	$1,402,716
Expand social care integration/system-	$615,619
Advance/maintain mPINC-	$0
Continue to expand STRONG ACC-	$385,746
Build a contraceptive health strategy-	$50,000
Expand population health data capacity-	$4,836,269
	$7,290,350

BalladHealth

Strategy #2: Position Ballad Health as a Community Health Improvement Organization

FY23 Budget

Expand STRONG Pregnancies and STRONG Starts-	$2,345,181
Expand Appalachian Highlands Care Network-	$2,837,328
Expand STRONG link-	$50,000
Expand Cessation services-	$283,557
Expand early prenatal care services-	$97,468
	$5,613,534

FY24 Budget

Expand STRONG Pregnancies and STRONG Starts-	$2,267,069
Support breastfeeding initiation across the region-	$269,390
Expand Appalachian Highlands Care Network-	$3,315,739
Expand STRONG link-	$75,000
Expand Cessation services-	$392,959
Expand early prenatal care services-	$0
	$6,320,157

BalladHealth™

Strategy #3: Enable Community Resources and Sound Health Policy

FY23 Budget	
	Strengthen community-based programs- $3,330,486
	Expand mobile services- $458,462
	Support early detection and intervention- $200,000
	Expand faith community nursing- $79,300
	$4,068,248

FY24 Budget	
	Strengthen community-based programs- $3,330,000
	Expand mobile services- $395,553
	Support early detection and intervention- $150,000
	Expand faith community nursing- $0
	$3,875,553

BalladHealth™

HR/GME Plan – FY23-FY25 (FY24 Budget)

The internal Ballad annual operating and capital budget concludes by no later than June 30th of each year in time for the start of next fiscal year on July 1st.

The annual operating and capital budget is not final until being approved by the Ballad board of directors, which currently occurs at the August board meeting.

The Tennessee Department of Health and the Virginia Department of Health requested KPIs and Targets for this Plan to assist the states with monitoring Ballad's progress towards meeting its minimum annual incremental spending commitment. The KPIs and Targets in this Plan are intended to serve as reference points only and Ballad shall not be penalized for failing to meet a specific KPI or Target if the spending associated with the approved Plan is met by the end of the Fiscal Year.

New 3-Year Plan: FY23 – FY25 Summary

Strategy Approved by TDH/VDH in Current Plan	Strategy Remains for FY23-FY25?	Specific Initiatives	FY 23	FY 24	FY 25	Budgeted Spend in FY23	Budgeted Spend in FY24	Estimated Spend in FY25
Strategy #1: Establish the Tennessee Virginia Regional Health Sciences Consortium (TVRHSC)	This strategy is folded into the other strategies.					n/a	**n/a**	n/a
Strategy #1: Expand Ballad academic infrastructure to support regional academic programs	Modified-#1 Expand Ballad academic infrastructure to support regional academic programs	• Expand internal preceptor/instructor capacity • Expand educational offerings across the Appalachian Highlands • Regional community Engagement/pipeline development • Continue first four-year plan implementation/operations • *ETSU GME Support◇*	X X X X	X X X X *X*	X X X X *X*	$2,028,189	**$4,150,689◇**	$4,000,000◇
Strategy #2: Expand Ballad Research infrastructure to support regional research programs	Modified-#2 Expand Ballad Research infrastructure to support regional research programs	• Enhance current research • Continue first four-year plan implementation/operations	X X	X X	X X	$2,082,187	**$1,909,300**	$3,000,000
Strategy #3: Develop and support regional research and academic programs	Modified-#3 Develop and support regional research and academic programs	• New program development • SIM Lab • Continue program support	X X	X X X	X X X	$5,654,904	**$8,169,556**	$6,000,000
Total Spend						$9,765,280	**$14,229,545◇**	$13,000,000◇

◇ ETSU GME Support added - Amendment final approval from **TDH** 2/8/2024

BalladHealth™

Strategy #1: Expand Ballad Academic Infrastructure to Support Regional Academic Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Expand Internal Preceptor/Instructor Capacity
 	
FY23: $75,000
 	
FY24: $57,500
	• Recruitment and Retention- FY23: $30,000 **FY24: $20,000**
	  • Assessment of current state and interest across Ballad Complete
	  • Develop plan for increasing preceptor/instructor capacity Complete
	  • Implementation- including active recruitment and contracting
	  • Recognition Program- re-recruit preceptors/instructors at end of each academic year
		• Completed assessment; presented to the monitors Q4
		• Plan developed Q3
		• Implementation by Q3 across all Ballad primary service area, with increase in capacity of 10% annually
		• Recognition program initiated Y/N Q4. With 95% recognition of regional preceptors/ instructors in FY23
			• Capacity plan annual updates Q2
			• Annual update of increase in capacity with target of 10% annually
			• Recognition program Q4. With 95% recognition of regional preceptors/instructors in FY24

	• System-wide scheduling- FY23: $10,000 **FY24: $7,500**
	  • Development of platform for scheduling learner rotations Complete
	  • Implementation of platform
		• Scheduling platform developed Q2
		• Assessment of capacity Q2
			• Implementation of scheduling platform Q2
			• Trend in student rotations from baseline Q4

	• Onboarding Program- FY23: $20,000 **FY24: $15,000**
	  • Development Complete
	  • Implementation
		• Developed Y/N
		• Implemented Y/N
			• Annual updates on progress Q4

	• Mentor and Professional Development Program- FY23: $15,000 **FY24: $15,000**
	  • Develop focused program of professional development in the area of adult professional learners for preceptors/instructors
	  • Assess availability of mentors for preceptors/instructors
	    • Initiate mentor program
		• Establish 10 mentors in the system Q3
		• Create materials for the mentoring process Q4
		• Record number of mentor relationships established in FY23 (set baseline for future years to monitor the progress)
			• 10% increase in mentors across system Q3
			• Survey mentors and mentees to elicit feedback on program Q4

BalladHealth

Strategy #1: Expand Ballad Academic Infrastructure to Support Regional Academic Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Expand Educational Offerings Across the Appalachian Highlands FY23: $100,000 **FY24: $360,000**	• Establish CME tracking system • Complete training and implementation Complete • Increase team member engagement in continuing education- FY23: $10,000 **FY24: $10,000** • Complete needs assessment	• Tracking of number of educational courses offered Q4 • Tracking of attendance Q4 • Tracking of Ballad and non-Ballad attendees Q4 • Tracking of new content offered Q4 • Provide accounting of current CME offering for FY22 (Titles and number)	• Tracking of number of educational courses offered Q4 • Tracking of attendance Q4 • Tracking of Ballad and non-Ballad attendees Q4 • Tracking of new content offered Q4
	• Expand, develop, and market course catalogue for continuing education for regional healthcare professionals- FY23:$20,000 **FY24: $20,000**	• Increase course offerings by 20% Q4	• Increase course offerings annually by 10-15% Q4
	• Develop and deploy educational offerings to local primary/secondary schools in key topics in healthcare- FY23: $20,000 **FY24: $30,000**	• Develop 5 course materials Q4 • Record the number of schools using the materials Q4 • Number of students impacted by the materials (# receiving educational offerings) Q4	• Develop 5 additional course materials Q4 • Record the number of schools using the materials Q4 • Number of students impacted by the materials (# receiving educational offerings) Q4
	• Plan regional academics and research summit- $50,000 (deposit and fees on event to occur in FY24) **FY24: $100,000**	• Planning work initiated Q3 • Provide date set for summit	• Host Summit Q2-3 • Develop plan for annual event Q3

	• Academic infrastructure **FY24: $200,000**
	  • Director of Academic Operations
	  • System Academic Coordinator
	  • System Internship Coordinator
			• Hire Director of Academic Operations (Y/N)
			• Hire System Academic Coordinator (Y/N)
			• Hire system Internship Coordinator (Y/N)

Final FY24 Plan Budgets

BalladHealth™

Strategy #1: Expand Ballad Academic Infrastructure to Support Regional Academic Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets

Regional Community Engagement/Pipeline Development
FY23: $525,000
 	
FY24: $405,000
	• Workforce development
	  • Complete regional workforce analysis- FY23: $350,000 Complete
	• Initiate recruitment/retention marketing campaign- FY23: $50,000 **FY24: $30,000**
	• Pipeline development
	  • Investment/partnership in regional pipeline programs/global health- FY23: $75,000 **FY24: $75,000**
	• Development of educational materials on careers in healthcare for primary/secondary schools- FY23: $50,000 **FY24: $50,000**
		• Create gap analysis as outlined in the TOC/CA Q3
		• Recruitment marketing campaign Q3
		
		• Identify 3-5 investment opportunities Q4
		• Develop marketing plan Q3
		• Career information materials developed Q2
		• Number of materials distributed Q4
			• Recruitment marketing campaign Q3
			
			• Identify 3-5 investment opportunities Q4
			• Implement marketing plan Q3
			• Number of materials distributed Q4

	• Appalachian Highlands Healthcare Academy **FY24: $250,000**
	• Develop plan for pilot in Greene County and city of Greeneville
	  • Develop Office of Secondary Education Programs
	    • Hire Director of Secondary Education Programing
	    • Hire Manager of Curriculum-based Programs
	    • Hire Manager of Secondary Education Integration
			• Pilot plan completed Q1
			• Offers made to Director and managers (Y/N)
			• Implementation Q3

BalladHealth

Strategy #1: Expand Ballad Academic Infrastructure to Support Regional Academic Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continue First Four Year Plan Implementation/Operations FY23: $1,328,189 **FY24: $1,328,189**		• Annual Report Y/N	• Annual Report (Y/N)
*ETSU GME Support – **TDH** Approved Amendment◊* ***FY24: $2,000,000***	• *Annual payments to ETSU in support of their GME program. Ballad having to fund as a result of changes in how TN distributes the GME funds.*		• *Annual summary of residency programs and "slots"*

FY23 Budget

Expand internal preceptor capacity-	$75,000
Expand educational offerings-	$100,000
Regional engagement/pipeline development-	$525,000
Continue first four-year plan implementation-	$1,328,189

FY24 Budget

Expand internal preceptor capacity-	$57,500
Expand educational offerings-	$360,000
Regional engagement/pipeline development-	$405,000
Continue first four-year plan implementation-	$1,328,189
ETSU GME Support◊-	*$2,000,000*
	$4,150,689◊

◊ ETSU GME Support added - Amendment final approval from **TDH** 2/8/2024

BalladHealth

Strategy #2: Expand Ballad Research Infrastructure to Support Regional Research Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Enhance Current Research Capabilities FY23: $350,000 **FY24: $152,000**	• Implement research structure based on assessment of the research enterprise at Ballad	• Staff retention program Q4 • Hire contract analyst Q4 • Hire financial analyst Q4	• Hire contract analyst Q4 • Hire financial analyst Q4

Continue First Four Year Plan Implementation/ Operations FY23: $1,732,187
 	
FY24: $1,757,300
	• Continue Association for the Accreditation of Human Research Protection Programs (AAHRPP) accreditation process for Ballad Institutional Review Board (IRB)- FY23: $150,000 **FY24: $340,000**
	• Continue to expand IRB membership- FY23: $50,000 **FY24: $50,000**
	• Transition to new IRB management system FY24: $30,000
		• Initiate contract with consultant for application Q1
		• Complete IRB policy review for accreditation Q3
		• Increase membership of IRB by 5 persons Q4
		   • New members onboarded Y/N Q4
		   • Complete stipend contracts for members Q4
			• Complete IRB accreditation preparation work Q4
			• Complete membership increase of IRB to 13 persons Q4
			• Hire Director for Office of Human Protection (Y/N)
			• Hire replacement manager for IRB (Y/N)
			• Hire new manager for Human Research Protection Program (HRPP) (Y/N)

BalladHealth

Strategy #2: Expand Ballad Research Infrastructure to Support Regional Research Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continued- Continue First Four Year Plan Implementation/ Operations FY23: $1,732,187 **FY24: $1,757,300**	• Redcap deployment- FY23:$0 Complete • Harvard Economic Study- FY23: $100,000 **FY24: $100,000** • Infrastructure support for STRONG LINK- FY23: $150,000 **FY24: $125,000**	• Redcap implemented Q3 • Expansion of patient enrollment in STRONG LINK by 10-15% Q4	• Expansion of patient enrollment in STRONG LINK by 10-15% Q4
	• Continue current research enterprise support- FY23: $1,132,187 **FY24: $1,112,300** • Ongoing hires: Corporate director (now VP Research Operations) Complete, grants writer Complete, research coordinators, Oncology manager	• Accounting of current trials and studies annually Q4 • Increase number of trials by 5-10% annually Q4 • Increase number of patients enrolled in studies by 5-10% Q4 • Offers made to open positions Q4	• Accounting of current trials and studies annually Q4 • Increase number of trials by 5-10% annually Q4 • Increase number of patients enrolled in studies by 5-10% Q4 • Offers made to open positions Q4

BalladHealth

Strategy #2: Expand Ballad Research Infrastructure to Support Regional Research Programs

FY23 Budget
Enhance current research- $350,000
Continue first four-year plan implementation- $1,732,187
$2,082,187

FY24 Budget
Enhance current research- $152,000
Continue first four-year plan implementation- $1,757,300
$1,909,300

BalladHealth

Strategy #3: Develop and Support Regional Research and Academic Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
New Program Development FY23: $3,126,404 **FY24: $250,000**	• SIM Lab – Milligan University		• Tracking of applicants, admits, and enrollments within each program (nursing, PA, OT). • Recruitment and retention of faculty to the University. • Number of students from each of the programs that have used the Simulation Lab annually. • Number of non-Milligan students that use the Simulation Lab annually. • Student retention rates in nursing, OT, and PA programs. • Clinical practice outcome measures in direct patient care at all levels of the curriculum. • Final didactic simulation experience and a final summative (end of program) simulation experience, as part of existing courses, with student performance tracked over time.

Final FY24 Plan Budgets

BalladHealth

Strategy #3: Develop and Support Regional Research and Academic Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continuing Program Support FY23: $2,528,500 **FY24: $7,919,556**	• Implementation of Appalachian Highlands Center for Nursing Advancement- FY23: $1,667,000 **FY24: $1,667,000**	• Graduates retained in the region Q4 • Graduates hired by Ballad Q4 • Provide annual report updates on progress toward its three strategic focuses: data; collaboration; advocacy Q4 • Number as percentage of total graduates	• Graduates retained in the region Q4 • Graduates hired by Ballad Q4 • Provide annual report updates on progress toward its three strategic focuses: data; collaboration; advocacy Q4 • Number as percentage of total graduates
	• Implementation of Gatton College of Pharmacy Center (GCOP) for Pharmacy Education, Advocacy and Outreach- FY23: $700,000 **FY24: $700,000**	• Graduates retained in the region Q4 • Graduates hired by Ballad Q4 • Development and implementation of annual conference Q4 • Number of experience hours achieved Q4 • Number of community pharmacists trained in addiction/mental health Q4 • GCOP faculty as integrated clinical specialists within Ballad facilities Q4 Y/N • Creation of report on current state of pharmacy curriculum in the region with recommendations for innovation Q4 • Number as percentage of total graduates	• Graduates retained in the region Q4 • Graduates hired by Ballad Q4 • Development and implementation of annual conference Q4 • Number of experience hours achieved Q4 • Number of community pharmacists trained in addiction/mental health Q4 • GCOP faculty as integrated clinical specialists within Ballad facilities Q4 Y/N • Creation of report on current state of pharmacy curriculum in the region with recommendations for innovation Q4 • Number as percentage of total graduates

BalladHealth

Strategy #3: Develop and Support Regional Research and Academic Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continued- Continuing Program Support FY23: $3,126,404 **FY24: $7,919,556**	• Initiate the Southwest Virginia Community College (SVCC) Ultrasonography Technology program- FY23: $192,604 **FY24: $40,000**	• Enrolled students Q4 • Graduates retained in region Q4 FY24 • Graduates hired by Ballad Q4 FY24 • Number as percentage of total graduates	• Enrolled students Q4 • Graduates retained in region Q4 FY24 • Graduates hired by Ballad Q4 FY24 • Number as percentage of total graduates
	• Development of ETSU College of Medicine Department of Psychiatry Fellowship in Child and Adolescent Psychiatry-FY23: $100,000 **FY24: $41,000**	• ACGME approval Q4 • Number of fellows Q4 • Graduates retained in the region Q4 FY25 • Graduates hired by Ballad Q4 FY25 • Number as percentage of total graduates	• ACGME approval Q4 • Number of fellows Q4 • Graduates retained in the region Q4 FY25 • Graduates hired by Ballad Q4 FY25 • Number as percentage of total graduates
	• STREAMWORKS- FY23: $150,000 **FY24: $150,000**	• Number of STEM events Q4 • Number of participants per event Q4 • Demographic information on attendees Q4	• Number of STEM events Q4 • Number of participants per event Q4 • Demographic information on attendees Q4
	• School of Nursing at Emory & Henry- FY23: $316,800 **FY24: $575,280**	• Enrollment Q4 • Projected graduation dates Q4 • Actual graduate completion data Q4 FY25 • Evidence of faculty hires Q4 • Pipeline program development with Smyth county schools Q4 • Graduates retained in the region Q4 FY25 • Graduates hired by Ballad Q4 FY25	• Enrollment Q4 • Projected graduation dates Q4 • Actual graduate completion data Q4 FY25 • Evidence of faculty hires Q4 • Pipeline program development with Smyth county schools Q4 • Graduates retained in the region Q4 FY25 • Graduates hired by Ballad Q4 FY25

BalladHealth

Strategy #3: Develop and Support Regional Research and Academic Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continued- Continuing Program Support FY23: $2,528,500 **FY24: $7,919,556**	• Center for Rural Health Research at ETSU College of Public Health- FY23: $1,500,000 **FY24: $1,500,000**	• Publications Q4 • Presentations Q4 • Grants Q4	• Publications Q4 • Presentations Q4 • Grants Q4
	• STRONG BRAIN Institute at ETSU- FY23: $200,000 **FY24: $200,000**	• Publications Q4 • Presentations Q4 • Grants Q4 • Certificate program enrollment Q4	• Publications Q4 • Presentations Q4 • Grants Q4 • Certificate program enrollment Q4
	• Medical Legal Partnership with Appalachian School of Law and Virginia Tech- FY23: $500,000 **FY24: $500,000**	• There are currently 63 metrics collected and reported annually	• There are currently 63 metrics collected and reported annually
	• Dental Residency at Johnston Memorial Hospital and Medical Residencies in SWVA continued support **FY24 $2,000,000**	• Number of low/no income patents served by the dental residency Q4 • Number of resident graduates retained in the region Q4 • Number of resident graduates hired by Ballad Q4 • Number as percentage of total graduates	• Number of low/no income patents served by the dental residency Q4 • Number of resident graduates retained in the region Q4 • Number of resident graduates hired by Ballad Q4 • Number as percentage of total graduates

Final FY24 Plan Budgets

BalladHealth

Strategy #3: Develop and Support Regional Research and Academic Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Continued- Continuing Program Support FY23: $2,528,500 **FY24: $7,919,556**	• Medical Residency Support and Clinical Environment Enhancement- FY23: $50,000 **FY24: $0**	• Annual accounting of new academic projects Q4 • Number of residents trained Q4 • Number of students trained Q4	• Annual accounting of new academic projects Q4 • Number of residents trained Q4 • Number of students trained Q4
	• Expansion of Addiction Medicine Fellowship at ETSU into SWVA- FY23: $278,500 **FY24: $546,276**	• ACGME Compliment Increase Approval Y/N • Graduates retained in the region Q4 • Graduates hired by Ballad Q4 • Number as percentage of total graduates	• ACGME Complement Increase Approval Y/N • Graduates retained in the region Q4 • Graduates hired by Ballad Q4 • Number as percentage of total graduates

FY23 Budget

New program development- $3,126,404
Continue program support- $2,528,500
$5,654,904

FY24 Budget

New program development (SIM Lab)- $250,000
Continue program support- $7,919,556
$8,169,556

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HIE Plan – FY23-FY25 (FY24 Budget)

The internal Ballad annual operating and capital budget concludes by no later than June 30th of each year in time for the start of next fiscal year on July 1st.

The annual operating and capital budget is not final until being approved by the Ballad board of directors, which currently occurs at the August board meeting.

The Tennessee Department of Health and the Virginia Department of Health requested KPIs and Targets for this Plan to assist the states with monitoring Ballad's progress towards meeting its minimum annual incremental spending commitment. The KPIs and Targets in this Plan are intended to serve as reference points only and Ballad shall not be penalized for failing to meet a specific KPI or Target if the spending associated with the approved Plan is met by the end of the Fiscal Year.

BalladHealth

New 3-Year Plan: FY23 – FY25 Summary

C - Capital Plan Budgeted Spend

Strategy Approved by TDH/VDH in Current Plan	Strategy Remains for FY23-FY25?	Specific Initiatives	FY 23	FY 24	FY 25	Budgeted Spend in FY23	Budgeted Spend in FY24	Estimated Spend in FY25
Strategy #1: Establish Ballad Health HIE Steering Committee	No. This strategy is complete.	None.	-	-	-	$0	**$0**	$0
Strategy #2: Conduct Geographic Service Area Interoperability Research	No. This strategy is complete.	None.	-	-	-	$0	**$0**	$0
Strategy #3: Identify Optimal Portfolio of Interoperability and Assemble Deployment Strategies	Yes- Ongoing expenses associated with this strategy.	• Continue to support access to Epic CareLink for community providers	X	X	X	$102,500	**$148,812**	$148,812
Strategy #4: Develop an HIE Recruitment and Support Plan	No. This strategy is complete.	None.	-	-	-	$0	**$0**	$0
Strategy #5: Participate in ConnectVirginia's HIE and Other TN/VA Regulatory Programs	Yes- Ongoing expenses associated with this strategy.	• Continue to support Collective Medical Technologies/EDIE access	X	X	X	$177,000	**$180,996**	$180,996
Total Spend						$279,500	**$329,808**	$329,808

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Strategy #1: Establish Ballad Health HIE Steering Committee

Initiative	Key Action Steps & Dates	KPIs & Targets
	No additional activity. This strategy is complete.	

FY23 Budget
$0

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Strategy #2: Conduct Geographic Service Area Interoperability Research

Initiative	Key Action Steps & Dates	KPIs & Targets
	No additional activity. This strategy is complete.	

FY23 Budget
$0

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Strategy #3: Identify Optimal Portfolio of Interoperability and Assemble Deployment Strategies

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Ongoing costs to provide access to Epic CareLink to community providers	• No new actions.	• None	• Continue Support Ongoing
Engage HealthLink Advisors to survey community providers in a manner that produces reliable results and ask if the Ballad solution for providing access for community providers to the Ballad medical records for their patients is a solution that meets their reasonable needs	• Provide scope of work, including a work plan, by July 1, 2022 COMPLETE • Complete the engagement by October 1, 2022 • Work closely with the monitors as well as HealthLink Advisors to help ensure that the finished product will meet the needs of each state COMPLETE • Provide a summary of the Ballad approaches to provide community providers access to the Ballad records of their patients and include in its report the pros, cons, and community provider cost of each solution COMPLETE	• Completed assessment from HealthLink Advisors provided to Monitors	

FY23 Budget	
	$102,500

FY24 Budget	
	$148,812

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Strategy #4: Develop an HIE Recruitment and Support Plan

Initiative	Key Action Steps & Dates	KPIs & Targets
	No additional activity. This strategy is complete.	

FY23 Budget
$0

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Strategy #5: Participate in ConnectVirginia's HIE and Other TN/VA Regulatory Programs

Initiative	Key Action Steps & Dates	FY23 KPIs & Targets	FY24 KPIs & Targets
Ongoing costs to support Collective Medical Technologies/EDIE access $177,000	No new actions.	None	Continue Support Ongoing

FY23 Budget	FY24 Budget
$177,000	$180,996

Final FY24 Plan Budgets

BalladHealth