



# William & Mary Study

## Overview

CBH engaged the William & Mary Mason School of Business to conduct a strategic and financial review of the planned integrated care facility and expanded campus. The review evaluated the financial feasibility of the new facility, workforce readiness, operational capacity, revenue assumptions, and CBH's organizational positioning.

Overall, the report affirms that the integrated care model presents a strong opportunity to expand access and strengthen CBH's regional role; however, it also identifies significant operational and financial risks if growth, staffing, and revenue diversification are not carefully managed.

CBH leadership has reviewed the findings and identified a focused, phased implementation approach to address the most critical recommendations.

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## Key Findings from the Report

The review identified five central themes:

### **1. Financial sustainability requires stronger modeling and disciplined use of data.**

The projected operating and debt costs of the new facilities will require substantial growth in service volume and revenue. CBH must actively use scenario modeling to guide staffing, space use, and service mix decisions.

### **2. Workforce capacity is the primary operational risk.**

High vacancy rates and a highly competitive labor market could limit CBH's ability to achieve projected volumes without changes to work structure and flexibility.

### **3. Revenue growth must extend beyond current outpatient and grant patterns.**

CBH will need to increase outpatient utilization and diversify revenue sources while remaining mission driven.

### **4. Operational and financial controls must continue to be strengthened.**

Improved tracking of program costs, productivity, and grant expenditures is essential as CBH's footprint and complexity increase.

### **5. Communication with staff, partners, and the community will be critical.**

Clear and coordinated communication is necessary to ensure internal alignment and external confidence as the new campus comes online.

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## CBH Priority Actions

Based on staff leadership input and report recommendations, CBH will focus first on the following three actions:

### **1. Implement Provider Productivity and Financial Modeling Tool**

CBH will adopt the financial and productivity modeling tool developed through the Mason School project and integrate it into routine management and planning processes.

This tool will be used to:

- support budgeting and staffing decisions,
- model multiple growth and revenue scenarios, and
- establish consistent productivity expectations by role and program.

Internal training will be provided so that management staff can independently use and maintain the model.

### **2. Strengthen Communication and Change Management**

CBH will implement a coordinated internal and external communication strategy as planning for the new campus continues. This includes:

- regular internal updates to staff on project progress and operational changes,
- consistent messaging for community partners and local governments, and
- alignment with statewide initiatives and terminology.

Well-managed communication has been identified as essential to maintaining staff confidence and community trust.

### **3. Increase Outpatient Revenue and Service Volume**

CBH will focus on expanding access to outpatient services beyond its most intensive and crisis-focused populations to increase utilization of outpatient clinical capacity and strengthen overall revenue performance. This strategy supports the report's finding that outpatient and medical services will play a key role in covering increased facilities and operating costs.

### **4. Continue Financial and Grant Expenditure Cleanup**

CBH will continue its ongoing work to improve financial controls, grant tracking, and cost allocation across programs. The operational and financial improvement framework outlined in the report (including the program-level cost and productivity analysis referenced in the report's financial section) will be used as the foundation for improving program-level financial visibility.

### **5. Expand Hybrid Work Options for Clinical Providers**

*To improve recruitment, retention, and workforce stability, CBH will expand hybrid work options for appropriate clinical roles, with an initial focus on adult psychiatry and outpatient therapy.*

*This approach is intended to strengthen CBH's competitiveness in the labor market while maintaining clinical quality and access standards.*