FY26 – FY28 Plans

Ballad Health
FY26 – FY28 Behavioral Health Plan

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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Behavioral Health: 3-Year Plan FY26 – FY28 Summary

Strategy Approved by TDH/VDH in Current Plan	Specific initiatives	FY26	FY27	FY28	Budgeted Spend in FY26	Estimated Spend in FY27	Estimated Spend in FY28
Strategy #1a – Develop the Ballad Health Behavioral Services Infrastructure: Service line leadership	• Continue and build Behavioral Health infrastructure	X	X	X	$4,027,000	$3,600,000	$3,700,000
Strategy #1b – Develop the Ballad Health Behavioral Services Infrastructure: Workforce retention and development for healthcare community	• Support academic programs for mental health professionals • Expand mental health resources for health care professionals	X X	X X	X X	$1,720,000	$2,010,000	$2,010,000
Strategy #2 – Develop a Comprehensive Approach to the Integration of Behavioral Health and Primary Care Integration	• Optimization and expansion of current integrated sites	X	X	X	$470,000	$450,000	$450,000
Strategy #3 – Supplement Existing Regional Crisis System For Youth and Adults	• Optimization of inpatient and support services • Expand community programs • Expand Outpatient Services	X X X	X X X	X X X	$8,313,200	$7,000,000	$7,000,000
Strategy #4 – Develop Enhanced and Expanded Resources for Addiction Treatment	• Expansion of Addiction Treatment Services • Expansion of Recovery Ecosystem	X X	X X	X X	$5,245,000	$2,600,000	$1,800,000
Strategy #5 – Behavioral Health Telehealth Implementation - NEW	• Optimize and expand telehealth services	X	X	X	$1,490,000	$1,008,000	$1,005,000
Total Spend					**$21,265,200**	**$16,668,000**	**$15,965,000**

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

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Continue and Build Behavioral Health Infrastructure FY26: $4,027,000	Maintain current staffing and operations (recurring spend of salary, benefits, lease and supply expenses)	Ongoing	$3,507,000	Staff maintained Y/N		
	• Hire 1 Additional Outreach FTE • Hire 1 De-escalation Training Educator FTE			Outreach FTE hired Y/N De-escalation Training Educator hired Y/N	Status:	
	Perform annual evaluation of new FTEs to support the next years plan	Q4 FY26		Annual evaluation outcomes (Q4)	Status:	
	Marketing Collateral and Outreach funds	Q4 FY26	$520,000			

	Budget	
FY26	Develop the Ballad Health Behavioral Services Infrastructure: Service line leadership	$4,027,000
		Total: $4,027,000

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

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Support academic programs for mental health professionals **FY26: $1,710,000**	Child/Adolescent Psychiatry Fellowship at ETSU (tied to HR/GME plan) • Implementation of operational plan at ETSU (Goal to start Fellowship July 2026) (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.)	Ongoing	$165,000	Plan developed and initiated Y/N	Status:	
				Clinic location identified Y/N	Location:	
				Acute Care training locations identified Y/N	Locations:	
				ACGME application submitted by November 2025 Y/N	Date:	
				ACGME Approval of new program Y/N	Status:	
				# of Fellows accepted into the program	Status:	
	Hiring of Faculty and Staff (recruitment and supply cost)					
	Support of the Addiction Medicine Fellowship (tied to HR/GME plan)- Ongoing Operational Expense	Ongoing expense/ operations	$1,500,000	Maintain ongoing operations	Status:	
	FY26 Budget developed and approved by ETSU and Ballad	Q1 FY26		Budget developed and approved Y/N	Status:	
		Ongoing		# of fellows completing program	Status:	
		Ongoing		# of fellows hired within service area (target 50% of fellows completing the program)	Status:	
	Support academic programs for mental health therapy professionals					
	Sponsor up to 3 students with scholarships to support services, will include a 1-year commitment (Scholarship candidates would include Bachelor/Master of Social Work, Counseling, Psychology or Mental Health related field.)	Ongoing yearly expense from FY23 plan	$45,000	# of contracts executed	Status:	

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

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Expand Mental Health Resources for Healthcare Professionals **FY26: $10,000**	Maintain Schwartz Rounds program at JCMC, BRMC, HVMC, and JMH (open to all community healthcare providers) • Structured program to provide caregivers a forum to share and discuss social and emotional issues they face in caring for patients and families.	Ongoing from FY23 plan-Operational Expense	$10,000	# of participants for each event (by site) Survey results shared by location post event Y/N	Status:	

	Budget: (Strategy 1a and 1b)	
FY26	Support academic programs for mental health therapy professionals	$1,710,000
	Expand Mental Health Resources for health care professionals	$10,000
		Total: $1,720,000

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

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Optimization and expansion of current integrated sites FY26: $470,000	Maintain Operations of current Integrated Sites (Ongoing Operational Expense)	Ongoing from initial 3-year and FY22 plan)	$470,000	# of visits per location	**Quarterly Update:** July: Aug: Sept:	
	Evaluate the need for additional FTE's to support services at integrated sites	Ongoing from FY23 plan		Adjustment to # of FTE's based on evaluation (include job titles)	Status:	
	Evaluate and implement expansion sites as demand warrants			New Locations Opened TBD (Sites to be listed)	Status:	

FY26	Budget:	
	Optimization and expansion of current integrated sites	$470,000
	Total: $470,000	

Strategy 3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Optimization of Inpatient and Support Services **FY26: $2,573,200**	Respond Expansion (Crisis assessment/patient flow services)- Ongoing Operational Expense • Maintain staffing and operations	Ongoing from initial 3-year and FY22 plans	$340,000	FY25 Average = 330 per month # of crisis assessment performed/month	**Quarterly update:** July: Aug: Sept:	
				FY25 Average = 2,900 per month # of calls handled/month	July: Aug: Sept:	
	• Hire FTEs to support operational growth as needed			Adjustment to # of FTEs based on evaluation	Status:	
	Transportation services (ongoing from initial 3-year plan) • Maintain staffing and current operations of transport services (ongoing)	Ongoing Operational Expense	$355,000	FY25 Average = 225 per month # of transports completed /month	July: Aug: Sept:	
	SBIRT – Ongoing Operational Expense • Maintain staffing and operations as described in previous plans (ongoing)	Ongoing from initial 3-year and FY22 plans	$665,000	FY25 Average = 12,385 per month (all SBIRT- Not differentiated by location) # of SBIRT Administrations (ED visits)	July: Aug: Sept:	Pop Health #7
				# of SBIRT Administrations (hospital admissions)	July: Aug: Sept:	Pop Health #6
	• Support ongoing training and development for SBIRT team members			# of trainings completed (provide detail on training content)	Status:	

Strategy 3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Continued- Optimization of Inpatient and Support Services **FY26: $2,573,200**	• Purchase needed IT equipment including computers and cell phones (capital)		$13,200	Description of purchased items (VOCERA/clip, Headsets)	Status:	
	Maintain operations of 24/7 Walk-in at Woodridge (Projected Operational loss)		$790,000	Serve a minimum of 125 walk in patients per month Y/N	Status:	
	• Hire FTE's to support operational growth as needed			FY25 Average = 155 per month # of patients seen per month	Quarterly Update July: Aug: Sept:	
				# of new FTE's hired based on need	July: Aug: Sept:	
	Maintain staffing and operations for follow up after hospitalization for mental illness - Ongoing operational expense • Hire staff to support discharge follow up post psychiatric hospitalization	Ongoing from FY23 plan	$115,000	Improvement of 7 day follow up metrics to exceed baseline of 33.3% Y/N	Status:	Pop Health #14
				Improvement of 30 day follow up metrics to exceed baseline of 58.6% Y/N	Status:	
				# of FTEs hired based on need	Status:	

Strategy 3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Continued- Optimization of Inpatient and Support Services **FY26: $2,573,200**	Maintain Healthy Planet / Compass Rose modules as applicable for behavioral health care coordination.[1]		$3,000	Healthy Planet / Compass Rose module-maintained Y/N	Status:	
	Implementation of Cheers Campaign Epic module (capital)		$112,000	Cheers Campaign EPIC module implemented Y/N	Status:	
	Maintain 1.0 FTE for Information Technology support of modules- Operational expense		$100,000	Maintain # of FTE's based on need	Status:	
	Maintain staffing and operations of Behavioral Health Case Management Team- Ongoing operational expense	Ongoing from FY23 plan	$80,000	Maintain # of FTE's based on need	Status:	

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[1] This is in conjunction with the previously approved Population Health initiative related to Healthy Plante/Compass Rose – BH allocated portion based on increased need for care coordination in high complexity cases.

Strategy 3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Expand Community Programs **FY26: $1,645,000**	Maintain school-based behavioral health support systems including Community Health Navigator(s)		$180,000	Maintain # of FTE's based on need	Status:	
	Expand Resilience Resources to interested schools or school systems (i.e. reset rooms, reset boxes, training)- Operational expense plus supplies			FY25: 15 new schools added # of new schools with description of resource added	Status:	
	Maintain staffing and operations for Sexual Assault Nurse Examiner (SANE) Program- provides post trauma care and emotional support- Ongoing operational expense	Ongoing from FY23 plan	$355,000	Maintain # of FTE's based on need	Status:	
	• Support Highlands Community Service Board (CSB) SANE infrastructure	Q1 FY26	$65,000	CSB funding awarded Y/N	Status:	
	Continuation of partnership with Frontier Health to operate an Intensive Treatment Team– Operational expense- • Program to identify/address root causes and care coordination for behavioral health patients with high recidivism rates • Identify and enroll patients in the program	Ongoing from FY24 plan	$345,000	Decrease IP psychiatric hospitalization by 60% for enrollees	Status:	
				FY25 Average = 23 enrollees # of patients enrolled	Status:	

Strategy 3: Supplement Existing Regional Crisis System:

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Continued- Expand Community Programs FY26: $1,645,000	Strengthen community action through Ballad Health and community-based investments for Mental Health Services		$700,000	RFPs issued and organizational partnerships evaluated Highlight work of distinct programs at each quarterly meeting	Status:	
Expand Outpatient Services FY26: $4,095,000	Maintain staffing and operations at new and incremental outpatient clinics approved in previous plans	Ongoing from original 3-year plan	$4,095,000	Increase visits by 10% over FY25 Y/N	Status:	
				# of visits per site/month (will compare to FY25 volumes for corresponding quarter)	**Quarterly update:** July Aug Sept	
	• Add staff as needed to scale services to meet demand			# of new FTE's hired based on demand (describe position and site hired)	Status:	

FY26

Budget:	
Optimization of Inpatient and Support Staff	$2,573,200
Expand Community Programs	$1,645,000
Expand Outpatient Services	$4,095,000
	Total: $8,313,200

Strategy 4: Develop Enhanced and Expanded Resources For Addiction Treatment

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Expansion of Addiction Treatment Services **FY26: $4,380,000**	STRONG Futures					
	Maintain staffing & operations of current Outpatient Clinic & Living Center in Greeneville, TN	Ongoing from initial 3-year and FY22 plans	$1,000,000	FY25 Annualized= 121 # of unduplicated families served	Status:	Pop Health #2
				FY25 Average = 7 women/5 children # of women/children utilizing the Living Center	Status:	
	Relocation of Living Center in Greeneville, TN- (prior credit expected to offset)	Ongoing from FY25 plan		Relocation of Living Center complete Y/N	Status:	
	Renovate former Mountain View site in Virginia to open residential and outpatient services- Capital and Operating expense for 1 quarter. (Goal to open by June 30, 2026)	Amendment submitted in FY25- pending approval.	$3,250,000 (Amount differs from the original amendment request due to early spend being covered by philanthropy)	Complete renovations of former Mountain View Regional Hospital location Y/N	Status:	Pop Health #2
				Obtain Licensure for providing residential and other levels of service Y/N	Status:	Pop Health #2 Pop Health #10
				Pregnancy Intervention- Strong Futures Enrollment better than baseline value of 10 Y/N POP Health Sub-Index Measure #2) Goal to serve >100 unique women per fiscal year (prorate goal if only open a portion of the year)	Status:	

Strategy 4: Develop Enhanced and Expanded Resources For Addiction Treatment

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Continued- Expansion of Addiction Treatment Services **FY26: $4,380,000**				VDH specific – Reduction in NAS Births with Baseline (3 yrs. prior to program launch VDH reporting avg) and annual data on volumes of babies born with NAS at VA facilities, as currently reported to VDH for VA-resident mothers (including) • # of NAS births, • Total # of births, and • Overall % of NAS births to total births	Status:	
	Ongoing operation of services at Overmountain Recovery in Gray, TN Capital expense-			Grow clinic volume by 5% over FY25 baseline Y/N (# active patients under treatment)		
	Capital Expenditure to expand lab, provide expanded security camera coverage and create tele-health pods		$105,000	Lab renovation complete Y/N Security Cameras installed Y/N Telehealth Pods implemented Y/N		
	Continue MAT Initiation in the ED program- operational expense	Ongoing from FY24 plan		# of EDs utilizing the program (based on patient need)	Status:	Pop Health #22
				FY25 Annualized = 77 # of patients discharged with a bridge order for suboxone	Status:	Pop Health #22
	Naloxone Distribution in the acute care setting- Operational Expense	Ongoing from FY24 plan	$25,000	FY25 Annualized = 540 # of Naloxone kits distributed	Status:	Pop Health #22

Strategy 4: Develop Enhanced and Expanded Resources For Addiction Treatment

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Expansion of Recovery Ecosystem **FY26: $865,000**	Strengthen community action through Ballad Health and community-based investments to support the Recovery Ecosystem operational expense	Ongoing from FY24 plan (prev. used for Recovery Housing support)	$250,000	# and detail of grant awards Highlight work of distinct programs at each quarterly meeting	Status:	
	Maintain Peer Recovery Specialists embedded into Inpatient Psychiatric settings- Ongoing Operational Expenses	Ongoing from FY24 plan	$115,000	Maintain # of FTE's based on need	Status:	
	Support Peer Recovery Specialists embedded into community settings (Peer Help)- Operational Expenses		$450,000	Maintain # of FTE's ~~hired~~ based on demand	Status:	
	Host a Recovery Symposium focused on prevention, addiction treatment, and recovery ecosystem- Operational Expense-	Q4 FY26	$50,000	Symposium Event Held Y/N	Status:	
				# of attendees (Target >200 attendees)	Status:	

FY26	**Budget:**	
	Expansion of Addiction Treatment Services	$4,380,000
	Expansion of Recovery Ecosystem	$865,000
	Total:	**$5,245,000**

Strategy 5: Behavioral Health Telehealth Implementation

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update	Ties to Index Scoring Measure
Optimize and expand telehealth services **FY26: $1,490,000**	Provide Psychiatric Consult Liaison (C/L) services to all hospitals- Operational Expenses	Ongoing from FY23 plan	$1,480,000	FY25 Average = 570 per month # of consults completed/month	**Quarterly update:** July: Aug: Sept:	
	Maintain Telehealth School based initiatives- operational expense			Maintain # of FTE's based on need	Status:	
	• Purchase technology to support (capital)		$10,000	Technology equipment purchased Y/N	Status: Describe items purchased	
	• Scale tele behavioral services to interested school systems			# of sites implemented (provide detail of school name, location)	Status:	
				Combined # of visits conducted within a school setting	July: Aug: Sept:	

	Budget:
FY26	Optimize and expand telehealth services **$1,490,000**

Ballad Health
FY26 – FY28 Population Health Plan

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Population Health: New 3-Year Plan FY26 – FY28 Summary

Strategy Approved by TDH/VDH in Current Plan	Specific Initiatives	FY26	FY27	FY28	Budgeted Spend in FY26	Estimated Spend in FY27	Estimated Spend in FY28
Strategy #1: Develop Population Health Infrastructure within the Health System and the Community	• Continue supporting population health infrastructure • Strengthen social care integration through needs assessment, referral and connection services, and community partner network • Continue supporting Strong LINK	X X X	X X X	X X X	$2,756,556	$2,811,687	$2,867,921
Strategy #2: Position Ballad Health as a Community Health Improvement Organization	• Maintain Strong Pregnancies and Strong Starts • Maintain Appalachian Highlands Care Network • Maintain cessation services • Continue to support mPINC and related activities	X X X X	X X X X	X X X X	$6,144,252	$6,267,137	$6,392,480
Strategy #3: Enable internal and external resources for health improvement	• Strengthen partnerships and action through intervention and program investments focusing on population health index improvement and monitoring metrics • Continue to serve as and provide STRONG ACC backbone services	X X	X X	X X	$1,494,252	$1,524,137	$1,554,620
Total Spend					$10,395,060	$10,602,961	$10,815,021

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

Initiative	Key Action Step (KAS)	KPIs & Targets	Status/Update	New Outcome Measure – Ties to Index Scoring Measure
Continue supporting population health infrastructure **FY26: $1,779,840**	• Maintain capabilities to compile, analyze and report population health index metrics	Produce population health metrics as outlined in the index	Status:	**Population Health Index Metrics**
	• Maintain operational infrastructure to accomplish programmatic and service goals	Operations maintained	Status:	**Population Health Index Metrics and Access Index Metric-Appalachian Highlands Care Network (AHCN)**
Strengthen social care integration through needs assessment, referral and connection services, and community partner network **FY26: $926,716**	• Expand # of UniteUs community organizations	Provide update of # of Unite Us in-network organizations	Status:	**Population Health Index- Strong Pregnancies, Strong Starts, Peer Recovery Services, and Prenatal Cessation Access Index Metric-AHCN**
		Produce an annual utilization report of the Unite Us system network	Status:	**Population Health Index- Strong Pregnancies, Strong Starts, Peer Recovery Services, and Prenatal Cessation Access Index Metric-AHCN**
	• Expand use of Universal Social Screener (USS) throughout ambulatory settings	Implement social screener in ambulatory settings	Status:	**Population Health Index- Strong Pregnancies, Strong Starts, Peer Recovery Services, and Prenatal Cessation Access Index Metric-AHCN**
Continue supporting Strong LINK **FY26: $50,000**	• Track LINK consents, enrollments and survey completions	Provide quarterly update of # of consents, enrollments, and surveys completed	Status:	**Population Health Index-Strong LINK**

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

Initiative	Key Action Step (KAS)	KPIs & Targets	Status/Update	New Outcome Measure – Ties to Index Scoring Measure
Continued- Continue supporting Strong LINK	• Conduct descriptive analysis on repository data	Produce an annual report containing descriptive analysis of repository data	Status:	**Population Health Index-Strong LINK**
FY26: $50,000	• Conduct descriptive analysis on survey data	Produce an annual report containing descriptive analysis of survey data	Status:	**Population Health Index-Strong LINK**

FY26	Budget:	
	Continue supporting infrastructure	$1,779,840
	Strengthen social care integration	$926,716
	Continue supporting Strong LINK	$50,000
		Total: $2,756,556

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

Initiative	Key Action Step (KAS)	KPIs & Targets	Status/Update	New Outcome Measure – Ties to Index Scoring Measure
Maintain Strong Pregnancies and Strong Starts FY26: $2,212,289	• Continue to support partner referral sites	Provide quarterly update on # of partner referral sites	Status:	**Population Health Index-Strong Pregnancies and Strong Starts enrollment**
	• Continue to embed navigators in partner sites and hospitals	Provide quarterly update on embedded navigators by location	Status:	**Population Health Index-Strong Pregnancies and Strong Starts enrollment**
	• Continue to enroll into the programs	Provide quarterly update on # enrolled	Status:	**Population Health Index-Strong Pregnancies and Strong Starts enrollment**
Maintain Appalachian Highlands Care Network FY26: $3,336,721	• Continue to support partner referral sites	Provide quarterly update on # of partner referral sites	Status:	**Access Index-Appalachian Highlands Care Network enrollment**
	• Continue to embed navigators in partner sites and hospitals	Provide quarterly update on embedded navigators by location	Status:	**Access Index-Appalachian Highlands Care Network enrollment**
	• Continue to enroll into the program	Provide quarterly update on # enrolled	Status:	**Access Index-Appalachian Highlands Care Network enrollment**
Maintain cessation services FY26: $595,242	• Continue to support referral partner sites/groups	Provide quarterly update on # of partner referral sites	Status:	**Population Health Index-Prenatal cessation enrollment**
	• Continue to enroll into the program	Provide quarterly update on # enrolled	Status:	**Population Health Index-Prenatal cessation enrollment**
Continue to support mPINC and related activities FY26: $0	• Conduct mPINC survey with all L&Ds based on CDC survey • Implement quality improvement processes based on findings from survey	Conduct CY25 survey	Status:	**Population Health Index-mPINC**
		Take CY25 survey results and create Quality Improvement plan to address areas of opportunity	Status:	**Population Health Index-mPINC**

	Budget:	
FY26	Maintain Strong Pregnancies/Starts	$2,212,289
	Maintain AHCN	$3,336,721
	Maintain cessation services	$595,242
	Continue to support mPINC	$0
		Total: $6,144,252

Strategy 3: Enable internal and external resources for health improvement

Initiative	Key Action Step (KAS)	KPIs & Targets	Status/Update	New Outcome Measure – Ties to Index Scoring Measure
Strengthen partnerships and action through intervention and program investments focusing on population health index improvement and monitoring metrics **FY26: $1,115,000**	• Conduct current partner evaluations for potential continuation and/or increased funding	Evaluations on all funded organizations/groups complete	Status:	**Population Health Index improvement and monitoring metrics**
	• Identify additional promising and best practices	RFPs issued and organizational partnerships evaluated	Status:	**Population Health Index improvement and monitoring metrics**
		Highlight work of distinct programs at each quarterly meeting	**Quarterly Update**	**Population Health Index improvement and monitoring metrics**
			July:	
			Aug:	
			Sept:	
Continue to serve as and provide backbones STRONG Accountable Care Community backbone services **FY26: $379,252**	• Continue to provide operational support	Operational support provided	Status:	**Population Health Index improvement and monitoring metrics**

FY26	Budget:	
	Strengthen partnerships	$1,115,000
	Backbone of STRONG ACC	$379,252
	Total: $1,494,252	

Ballad Health
FY26 – FY28 HR/GME Plan

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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HRGME: New 3-Year Plan FY26 – FY28 Summary

Strategy Approved by TDH/VDH in Current Plan	Specific Initiatives	FY26	FY27	FY28	Budgeted Spend in FY26	Estimated Spend in FY27	Estimated Spend in FY28
Strategy #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 five-year plan implementation/operations	X X X X	X X X X	X X X X	$2,200,189	$2,200,000	$2,200,000
Strategy #2: Expand Ballad Research infrastructure to support regional research programs	• Enhance current research • Continue first five-year plan implementation/operations	X X	X X	X X	$2,468,300	$2,500,000	$2,500,000
Strategy #3: Develop and support regional research and academic programs	• New program development • Continue program support	X X	X X	X X	$11,169,728	$11,000,000	$11,000,000
Total Spend					$15,838,217	$15,700,000	$15,700,000

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

Initiative	Key Action Step (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update
Expand Internal Preceptor/Instructor Capacity FY26: $10,000	• Recruitment and Retention	Q4 FY26	$5,000	15% Increase over baseline overall (8-10 new preceptors annually)	Status:
		Q4 FY26		5% increase in key clinical sites- Ob/GYN, Peds, Psych	Status:
		Q4 FY26	$5,000	Reward and recognition- 95% of preceptors	Status:
Expand Educational Offerings Across the Appalachian Highlands FY26: $125,000	• Increase team member engagement in continuing education	Q4 FY26	$75,000	Implement quarterly system-wide grand rounds (4 grand rounds annually)	Status:
		Q4 FY26		Develop one new enduring material program annually (one new program annually)	Status:
		Q4 FY26		Provide Wilderness Medicine CME Course for trauma/ first responders in the region	Status:
	• Regional academics and research summit	Q4 FY26	$50,000	Host Summit (host 150 individuals at the summit annually)	Status:
K-12 Regional Community Engagement/Pipeline Development FY26: $187,000	• Workforce development	Q4 FY26	$152,000	Expand Observation program 10% annually over baseline (Add 38 non-high school observers and 65 high school observers)	Status:
		Q4 FY26		Learner survey- APP, Medical student, observers (report on results of survey and actions taken in response annually)	Status:
		Q4 FY26		Hire 2 Career Development Specialists	Status:
	• Pipeline development	Q4 FY26	$25,000	Invest in new regional program development	Status:
	• K-12 engagement	Q4 FY26	$10,000	15% Increase in HS Enrollment in shadowing and WBL Programs (add 65 students)	Status:
				Achieve 85% satisfaction rate in annual student surveys	Status:

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

Initiative	Key Action Step (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update
Continued- K-12 Regional Community Engagement/Pipeline Development **FY26: $187,000**				Expand partnerships to 3 additional high schools	Status:
				Include 2 new hospital departments for shadowing opportunities and 5 BHMA Clinics, including non-clinical	Status:
				10% of program graduates offered healthcare roles within Ballad or Partners	Status:
				Launch 5 Community Outreach Events	Status:
				Team Member participation in middle/high school events- 5 events	Status:
	• Ballad Health Academy	Q4 FY26		Number of students enrolled- year 1 (target 130 students in first cohort)	Status:
		Q4 FY26		Yearly attrition rate	Status:
Continue First Five Year Plan Implementation/Operations **FY26: $1,878,189**		Q4 FY26	$1,878,189		Annual Report

	Budget:	
FY26	Expand Internal Preceptor/Instructor Capacity	$10,000
	Expand Educational Offerings Across the Appalachian Highlands	$125,000
	K-12 Regional Community Engagement/Pipeline Development	$187,000
	Continue First Five Year Plan Implementation/Operations	$1,878,189
	Total:	**$2,200,189**

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

Initiative	Key Action Step (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update
Enhance Current Research Capabilities **FY26: $995,000**	• Manager HRPP Education/outreach	Q4 FY26	$295,000	Hire Manager HRPP Education/outreach	Status:
	• Clinical Research Coordinator	Q4 FY26		Hire research Coordinator (3)- Coverage for three additional facilities (Abingdon, Norton, and Bristol)	Status:
	• Secure equipment/certification to increase the number of facilities engaged in research	Q4 FY26	$700,000	Freezers, centrifuges, Vital Signs equipment, Storage equipment for dangerous goods, IATA and other certifications dedicated for research at three additional facilities (Abingdon, Norton, and Bristol)	Status:
Continue First Five Year Plan Implementation/ Operations **FY26: $1,473,300**	• Continue current research enterprise support-	Q4 FY26	$912,300	Accounting of current trials and studies annually	Annual Report
		Q4 FY26		Increase number of trials by 5%, approximately ten (10) clinical trials	Annual Report
		Q4 FY26		Increase number of research participants enrolled in studies by 5%, approximately fifty (50) research participants	Annual Report
	Ongoing operations:				
	○ IRB	Q4 FY26	$130,000	Increase Membership to 15	Status:
				Achieve IT integration of new IRB management system	Status:
				AAHRPP Accreditation	Status:
				Develop second IRB panel and potentially shared panel with ETSU	Status:
	○ STRONG LINK	Q4 FY26	$150,000	As per Population Health plan	Status:
	○ Infrastructure	Q4 FY26	$27,000	Statistics License purchase	Status:
		Q4 FY26	$234,000	Research Software	Status:
		Q4 FY26	$20,000	Educational/outreach materials	Status:

FY26	**Budget:**	
	Enhance Current Research Capabilities	$995,000
	Continue First Five Year Plan Implementation/ Operations	$1,473,300
	Total: $2,468,300	

Strategy 3: Develop and Support Regional Research and Academic Programs

Initiative	Key Action Step (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update
New Program Development **FY 26: $600,000**	• Kingsport Dental residency	Q4 FY26	$600,000	CODA accreditation	Annual Update
				Graduation rate (graduation of 6 residents annually)	
				Volume of patients seen	
				Retention of graduates in region	
Continuing Program Support **FY26: $10,569,728**	• Milligan University Sim Lab	Q4 FY26	$250,000	Tracking of applicants, admits, and enrollments within each program (nursing, PA, OT).	Annual Update
				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 (goal of 30% retention rate in the region annually)	
				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.	
	• 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	Q4 FY26	$2,000,000	Annual summary of resident "slots"	Annual update
	• Northeast State Community College Radiologic Technologist Program	Q4 FY26	$108,000	Enrollment of 15 students annually	Annual Update
				Demographics	
				Graduation and retention rates	

Strategy 3: Develop and Support Regional Research and Academic Programs

Initiative	Key Action Step (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update
Continued- Continuing Program Support **FY26:** **$10,569,728**	• ETSU CRNA Program	Q4 FY26	$300,000	Program director search initiated	Status:
		Q4 FY26		Program plan for accreditation	Status:
	• Implementation of Appalachian Highlands Center for Nursing Advancement-	Q4 FY26	$1,667,000	Graduates retained in the region (goal of 40% retention in the region annually)	Annual Update
				Graduates hired by Ballad	
				Provide annual report updates on progress toward its three strategic focuses: data; collaboration; advocacy	
				Number as percentage of total graduates	
	• Implementation of Gatton College of Pharmacy Center (GCOP) for Pharmacy Education, Advocacy and Outreach	Q4 FY26	$700,000	Goal 45-60 students annually	Annual Update
				Graduates retained in the region (goal of 40% retention annually)	
				Graduates hired by Ballad	
				Development and implementation of annual conference	
				Number of experience hours achieved	
				Number of community pharmacists trained in addiction/mental health	
				GCOP faculty as integrated clinical specialists within Ballad facilities	
				Creation of report on current state of pharmacy curriculum in the region with recommendations for innovation	
				Number as percentage of total graduates	
	• Initiate the Southwest Virginia Community College (SVCC) Ultrasonography Technology program	Q4 FY26	$59,648	Enrolled students (goal 20 students)	Annual Update
				Graduates retained in region (goal 30% retention)	
				Graduates hired by Ballad	
				Number as percentage of total graduates	

Strategy 3: Develop and Support Regional Research and Academic Programs

Initiative	Key Action Step (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update
Continued- Continuing Program Support **FY26:** **$10,569,728**	• Development of ETSU College of Medicine Department of Psychiatry Fellowship in Child and Adolescent Psychiatry	Q4 FY26	$50,000	ACGME approval	Annual Update
				Number of fellows (2 fellows in first full year of program)	
				Graduates retained in the region (goal 50% retention initially)	
				Graduates hired by Ballad	
				Number as percentage of total graduates	
	• STREAMWORKS	Q4 FY26	$150,000	Number of STEM events (45-50 events annually)	Status:
				Number of participants per event	Status:
				Demographic information on attendees	Status:
	• School of Nursing at Emory & Henry-	Q4 FY26	$685,080	Enrollment (goal of 30 students annually)	Annual Update
				Projected graduation dates	
				Actual graduate completion data	
				Evidence of faculty hires	
				Pipeline program development with Smyth County schools	
				Graduates retained in the region (goal of 40% retained)	
				Graduates hired by Ballad	
	• Dental Residency at Johnston Memorial Hospital and Medical Residencies in SWVA continued support	Q4 FY26	$2,000,000	Number of low/no income patents served by the dental residency (goal 10,000 patients seen)	Annual Update
				Number of resident graduates retained in the region (retain 1-2 graduates in the region annually)	
				Number of resident graduates hired by Ballad	
				Number as percentage of total graduates	
	• Center for Rural Health Research at ETSU College of Public Health	Q4 FY26	$1,500,000	Publications	Annual Update
				Presentations	
				Grants	

Strategy 3: Develop and Support Regional Research and Academic Programs

Initiative	Key Action Step (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update
Continued- Continuing Program Support **FY26:** **$10,569,728**	• Medical Legal Partnership with Appalachian School of Law and Virginia Tech	Q4 FY26	$500,000	There are currently 63 metrics collected and reported annually	Annual Update
	• ETSU Addiction Medicine Fellowship	Q4 FY26	$600,000	Graduates retained in the region (retain 50% of graduates)	Annual Update
				Graduates hired by Ballad	
				Number as percentage of total graduates	

	Budget:	
FY26	New Program Development	$600,000
	Continuing Program Support	$10,569,728
	Total: $11,169,728	

Ballad Health
FY26 – FY28 HIE Plan

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™

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HIE Plan: New 3-Year Plan FY26 – FY28 Summary

Strategy Approved by TDH/VDH in Current Plan	Specific Initiatives	FY26	FY27	FY28	Budgeted Spend in FY26	Estimated Spend in FY27	Estimated Spend in FY28
Strategy #1: Identify Optimal Portfolio of Interoperability and Assemble Deployment Strategies **(Previously strategy #3)**	• Continue to support and expand EpicCare Link and Healthy Planet Link to community providers • Continue to provide data feed to OnePartner • Deploy and expand Epic's Community Connect	X	X	X	$1,945,000	$4,480,000	$4,490,000
Strategy #2: Participate in ConnectVirginia's HIE and Other TN/VA Regulatory Programs **(Previously strategy #5)**	• Continue to support Collective Medical Technologies/EDIE access	X	X	X	$190,000	$195,000	$195,000
Total Spend					**$2,135,000**	**$4,675,000**	**$4,685,000**

Strategy 1: Identify Optimal Portfolio of Interoperability and Assemble Deployment Strategies

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS (if applicable)	KPIs & Targets	Status/Update
Continue to Support and Expand EpicCare Link and Healthy Planet Link to Community Providers **FY26: $120,000**	• Support and expand EpicCare Link and Healthy Planet Link	Q4 FY26	$120,000	EpicCare Link usage with FY26 data as a baseline	Status:
Continue to Provide Data Feed to One-Partner	• Continue data feed	Q4 FY26		Data feed provided	Status:
Deploy and Expand Epic's Community Connect **FY26: $1,825,000*** **C: $1,500,000**	• Sign contracts with one or more community providers • Configure Epic's Community Connect for other community providers	Q4 FY26	$1,500,000- C $325,000- Operating Expense	One contract signed	Status:

FY26	Budget:	
	Continue to Support and Expand EpicCare Link and Healthy Planet Link to Community Providers	$120,000
	Continue to Provide Data Feed to One-Partner	$0
	Deploy and Expand Epic's Community Connect	$1,825,000
		Total $1,945,000

C – Capital Plan Budgeted Spend

* Includes Capital and Operational Expense

Strategy 2: Participate in ConnectVirginia's HIE and Other TN/VA Regulatory Programs

Initiative	Key Action Steps (KAS)	KAS Date (if applicable)	$ per KAS	KPIs & Targets	Status/Update
Continue to Support Collective Medical Technologies/EDIE Access **FY26: $190,000**	• IT continues to support Collective Medical Technologies/EDIE access			Support continued	Status:

	Budget:
FY26	Continue to Support Collective Medical Technologies/EDIE Access $190,000