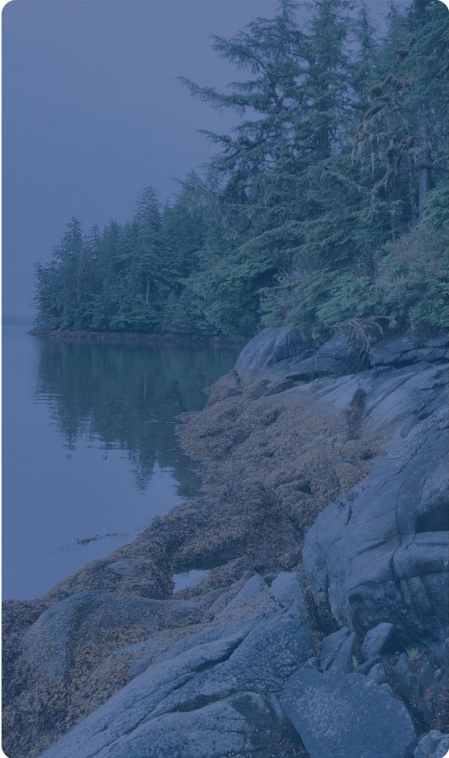
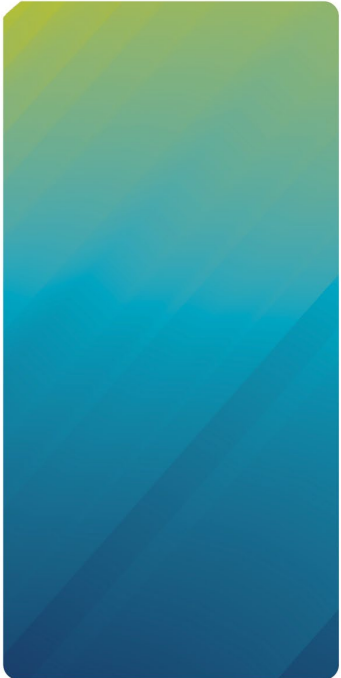


# CEO Update

May 2026



Trust  
Alaska Mental Health  
Trust Authority



# Today we'll cover:

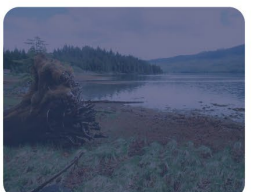
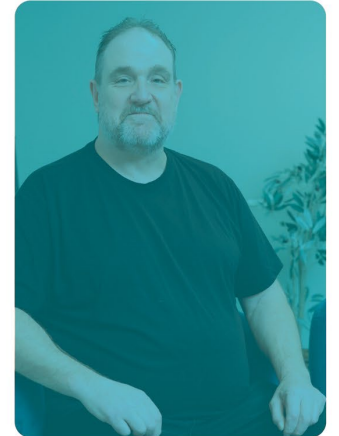
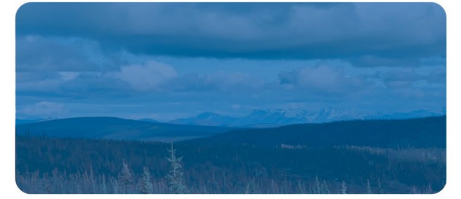
- Recent activities
- FY 27 & FY28 budgets
- Rural Health Transformation Program
- Strat Planning update
- What's on the horizon



# Trust Community Outreach

Recent rural & community outreach:

- Kotzebue
  - *Weathered out of Kiana*
- Fairbanks
- Kenai
- Kodiak
  - Old Harbor and Port Lions



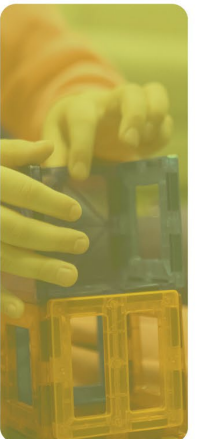
# Trust FY27 GF/MH Recommendations

| Operating Budget Items, FY27                 | Trustee Approved Recommendations |                   |
|----------------------------------------------|----------------------------------|-------------------|
| Project                                      | GF/MH                            | Associated MHTAAR |
| Crisis Call Center (DOH)                     | \$500.00                         | \$1,000.00        |
| <i>Subtotal</i>                              | <b>\$500.00</b>                  | <b>\$1,000.00</b> |
|                                              |                                  |                   |
| Capital Budget Items, FY27                   | Trustee Approved Recommendations |                   |
| Project                                      | GF/MH                            | Associated MHTAAR |
| Coordinated Community Transportation (DOTPF) | \$700.00                         | \$ -              |
| Special Needs Housing Grant (DOR)            | \$1,750.00                       | \$200.00          |
| Homeless Assistance Program (DOR)            | \$2,850.00                       | \$950.00          |
| Home Modifications & Upgrades (DOH)          | \$1,150.00                       | \$ -              |
| <i>Subtotal</i>                              | <b>\$6,450.00</b>                | <b>\$1,150.00</b> |
|                                              |                                  |                   |
| <b>TOTAL</b>                                 | <b>\$6,950.00</b>                | <b>\$2,150.00</b> |

| Governor's Budget |                   | Legislature's Budget |                   | Notes                                                                                  |
|-------------------|-------------------|----------------------|-------------------|----------------------------------------------------------------------------------------|
| GF/MH             | Associated MHTAAR | GF/MH                | Associated MHTAAR |                                                                                        |
| \$ -              | \$1,000.00        | \$500.00             | \$1,000.00        |                                                                                        |
| <b>\$ -</b>       | <b>\$1,000.00</b> | <b>\$500.00</b>      | <b>\$1,000.00</b> |                                                                                        |
|                   |                   |                      |                   |                                                                                        |
| Governor's Budget |                   | Legislature's Budget |                   | Notes                                                                                  |
| GF/MH             | Associated MHTAAR | GF/MH                | Associated MHTAAR |                                                                                        |
| \$700.00          | \$ -              | \$700.00             | \$ -              |                                                                                        |
| \$ -              | \$200.00          | \$ -                 | \$200.00          | GOV included \$1,750 .00 in AHFC Dividends                                             |
| \$ -              | \$950.00          | \$ -                 | \$950.00          | GOV included \$4,050.00 in AHFC Dividends, LEG added \$5,150.00 more in AHFC Dividends |
| \$1,150.00        | \$ -              | \$1,150.00           | \$ -              |                                                                                        |
| <b>\$1,850.00</b> | <b>\$1,150.00</b> | <b>\$1,850.00</b>    | <b>\$1,150.00</b> |                                                                                        |
|                   |                   |                      |                   |                                                                                        |
| <b>\$1,850.00</b> | <b>\$2,150.00</b> | <b>\$2,350.00</b>    | <b>\$2,150.00</b> |                                                                                        |

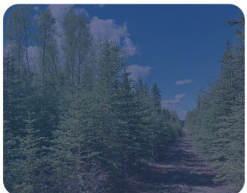
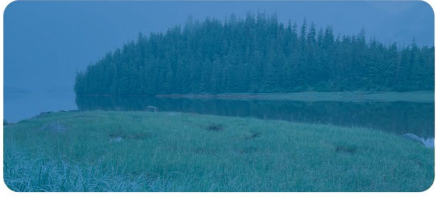
# FY28 Planning & Budget Development

| Key Activities        |                                                       |
|-----------------------|-------------------------------------------------------|
| October-December 2025 | Strategic Plan Finalized                              |
| Ongoing 2025-2026     | Stakeholder engagement + Advisor Recommendations      |
| April-July 2026       | Drafting FY28/29 Budget Recommendations               |
| July 2026             | P&P Committee overview of FY28 budget recommendations |
| August 2026           | FY28/29 Board deliberation & approval                 |
| September 15, 2026    | Budget transmitted to Governor & LB&A                 |
| Spring 2027           | Staff begin work on review/draft of FY29 budget       |



# Recent Activity Highlights

- Welcoming remarks at the Infant, Child, and Youth Conference
  - Several Trust grantees featured on an “Alaska Innovations Panel” at the event
- Leadership presentation to the Tribal Behavioral Health Directors
- Katie and Eric participation in the Pediatric Behavioral Health Summit, Fairbanks
  - Additional partner engagement in Fairbanks



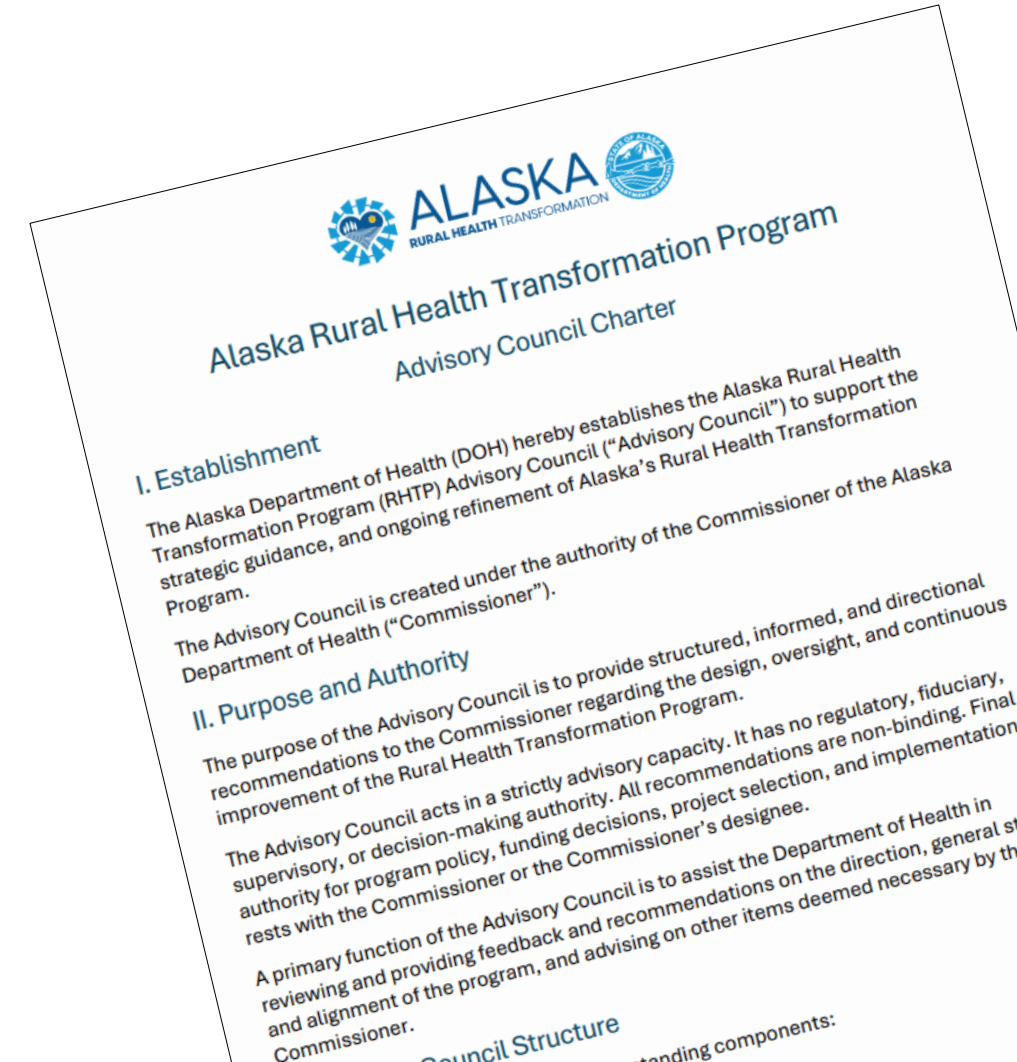
# Activities, Cont'd

- Katie spoke on panel focused on crisis response at Pathways to Recovery conference
- Kelda represented the Trust at the AK Assoc. on Developmental Disabilities spring gathering
- Heather participated in the inaugural meeting of a statewide therapeutic court advisory committee
- Heather toured the Deschutes County Stabilization Center (DCSC) in Bend, Oregon along with AK Behavioral Health earlier this month.
- RFP for peer-led services issued, proposals due May 26

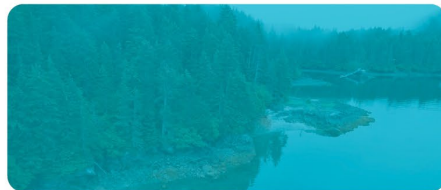


# Rural Health Transformation Program

- Advisory Council update
- YEAR 1 LOI review complete
- Year 2 LOI submission/ application anticipated for late summer 2026
- Great interest in RHTP funding among Trust partners
- Trust staff have/will participate in regional convenings



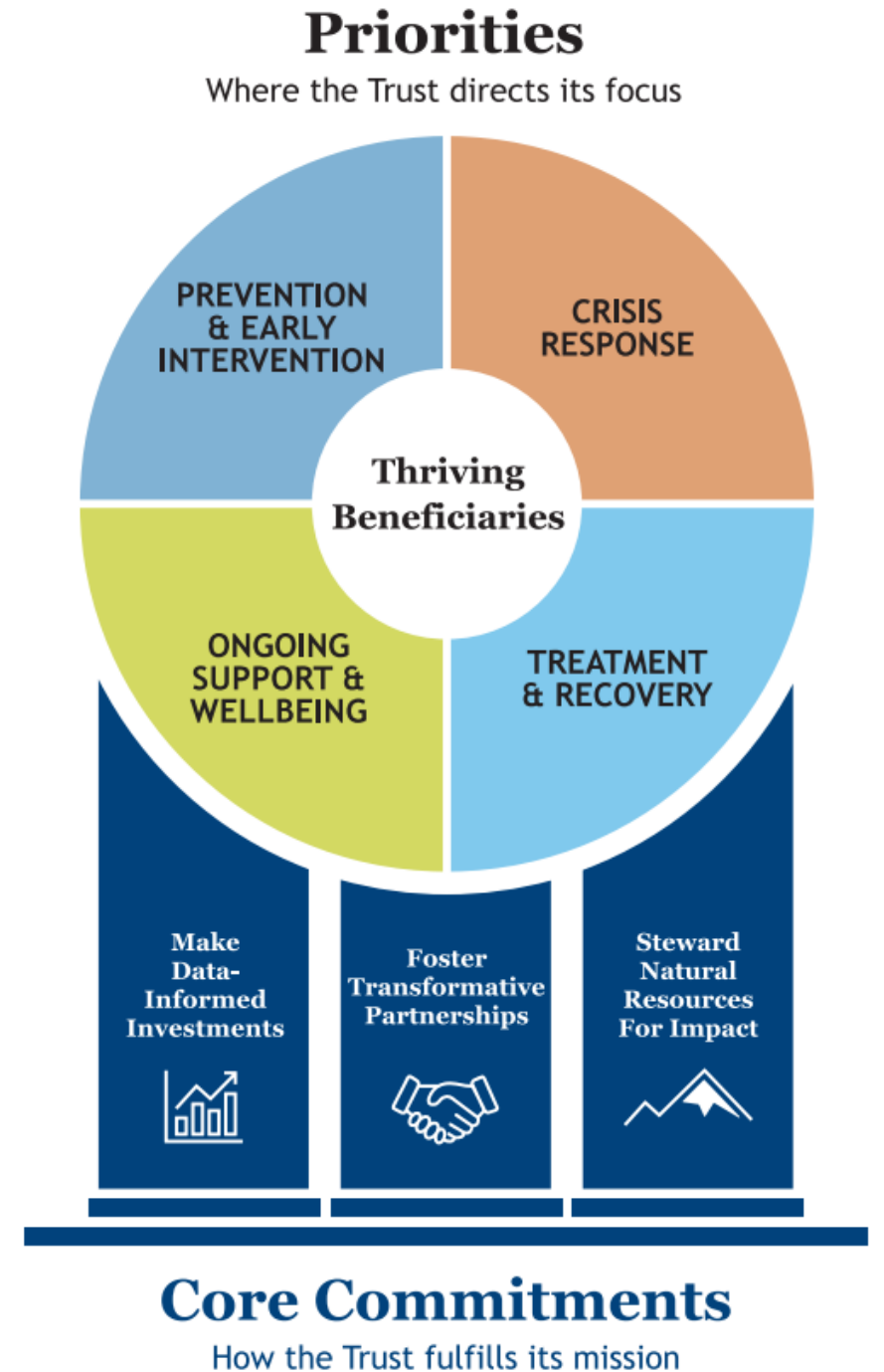
# Strategic Plan Update



# The Trust Strategic Plan:

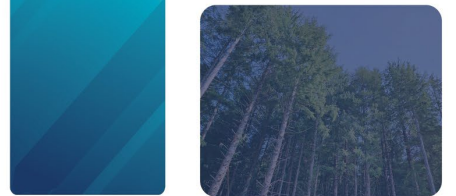
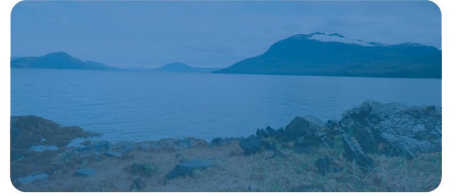
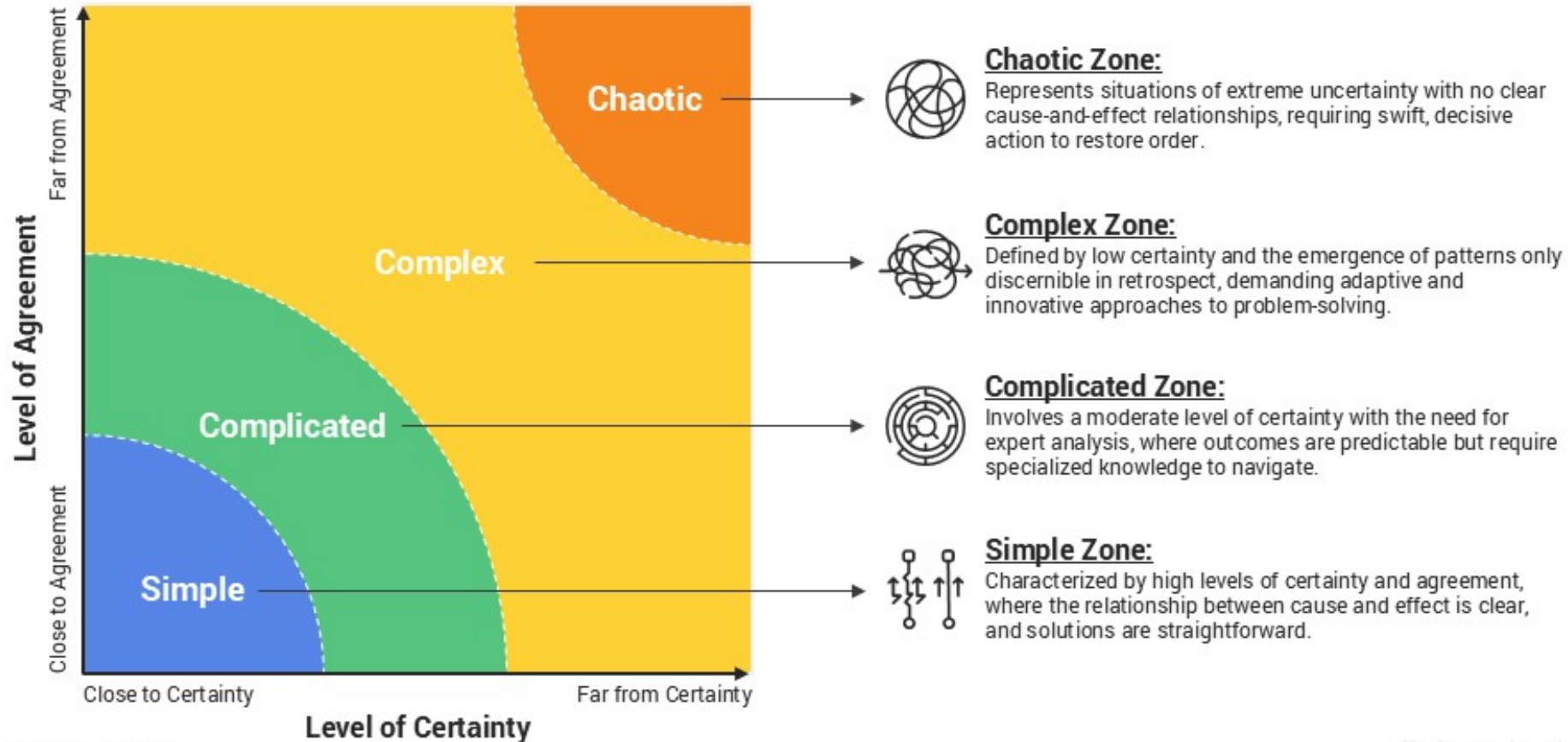
## *A Vision to Support Generations of Alaskans*

- Adopted by board of trustees in Dec. 2025, following thorough process including stakeholder engagement and public comment
- Affirms shared commitment to advance efforts to improve the lives of Trust beneficiaries
- Connects the Trust's financial and land assets with our core mission, ensuring both are managed for lasting, positive change across Alaska
- Includes two elements: Core Commitments & Priorities



# Strategic Planning

## The Stacey Matrix by Ralph D. Stacey





# Strat Plan Operational Plan

This plan defines:

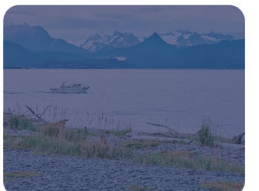
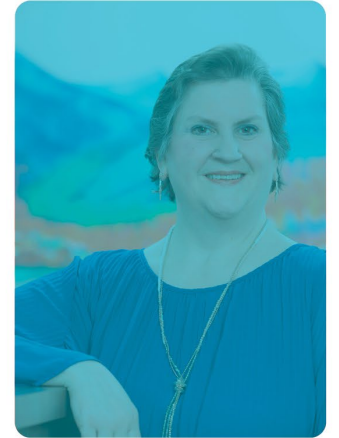
- how we will organize ourself to achieve the priorities and commitments in the Strat Plan
- how we will do so practically, sustainably, and in alignment with our fiduciary and systems-change responsibilities

The Operational Plan was developed through a series of activities between January - April 2026:

- leadership working sessions
- internal meetings
- insight exercises re: workflows and data processes
- staff workshops

# Trust Operational Domains

| Trust Operational Domains |                                     |                                                                                  |
|---------------------------|-------------------------------------|----------------------------------------------------------------------------------|
| 1                         | Grants and Investments              | How we deploy resources: on what basis, through what process, toward what ends.  |
| 2                         | Moonshot                            | How we identify and launch our highest-leverage catalytic investments.           |
| 3                         | Data                                | How data informs investment decisions, progress, and impact measurement.         |
| 4                         | Partner & Stakeholders              | How we engage partners, advisors, state agencies, and communities.               |
| 5                         | Annual Operating Cycle              | How we structure our annual rhythm of budget, trustee engagement, and reporting. |
| 6                         | Organizational Structure & Staffing | How we organize work, build capacity, and sustain operational continuity.        |



A decorative sidebar on the left side of the slide. It features a vertical stack of elements: a landscape photo of a dirt road through a field, a solid blue rectangle, a solid yellow rectangle, a photo of a young girl with her hands clasped, a solid dark blue rectangle, a solid light blue rectangle, a solid yellow rectangle, a solid blue rectangle with diagonal stripes, and a photo of a forest path.

# Domain 1: Grants and Investments

## Objective 1.1: Design the Grantmaking Model

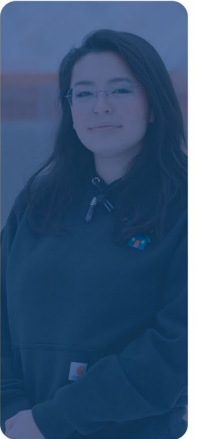
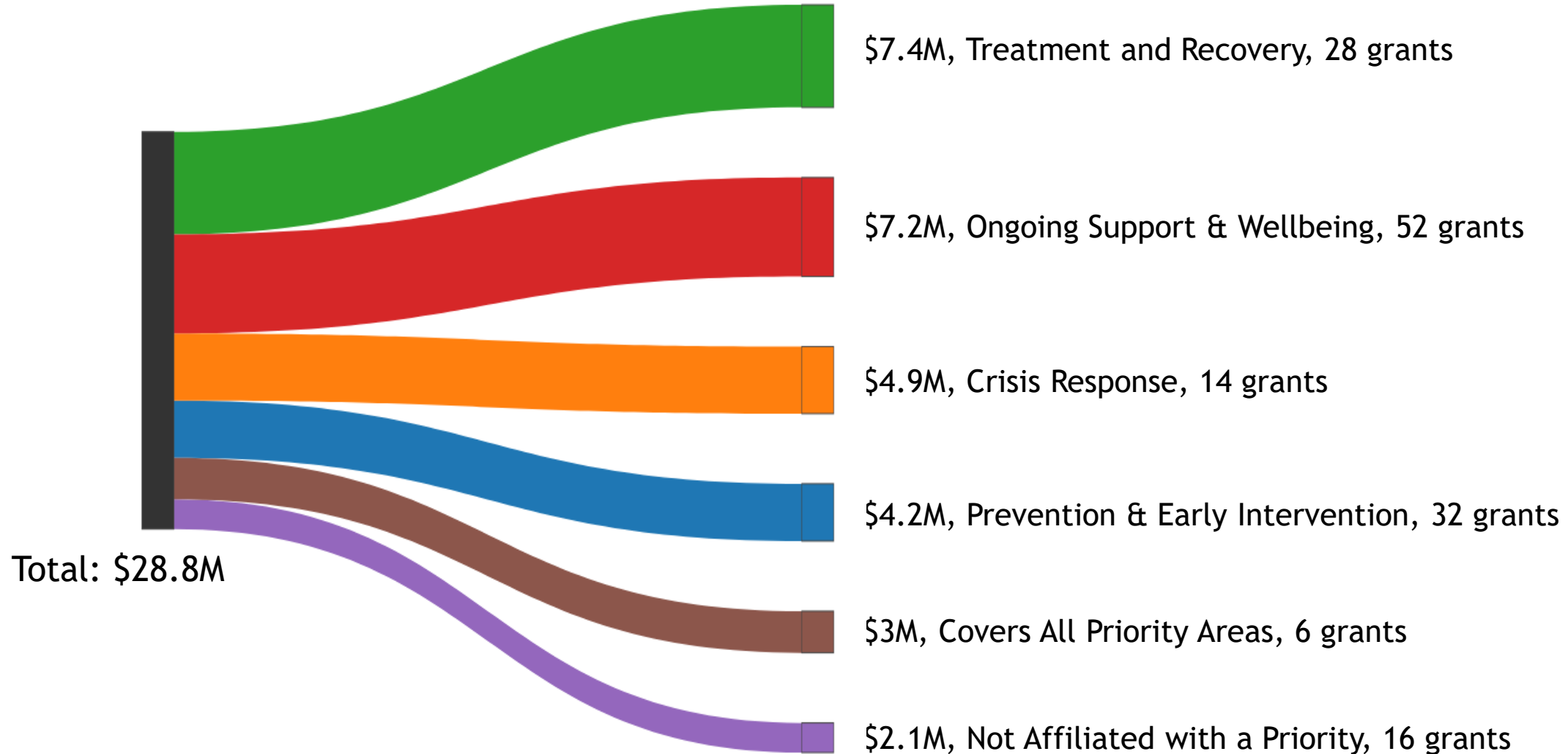
- Clarify the balance of proactive, responsive, and moonshot investments; define when multi-year funding applies; and establish clear criteria and internal processes for grant decisions.

## Objective 1.2: Scope the Four Priority Areas

- Align the existing portfolio to the Strategic Framework and clarify scope, roles, and transition decisions for each priority area to guide investments, staff work and partner communication.

# FY26 MHTAAR & Authority Grants

## - crosswalk to new priorities



# Domain 2: Moonshot

## Objective 2.1: Develop the Moonshot Process Architecture

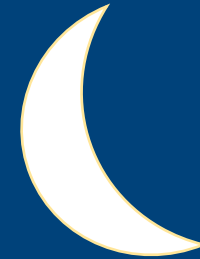
- Create a clear, repeatable process for identifying, evaluating and advancing moonshot initiatives.

## Objective 2.2: Select the Moonshot(s)

- Identify and advance high-potential initiatives through a full development and approval process.

Staff are currently engaged in work to define moonshot criteria and develop moonshot options for trustee consideration.

Trustees are slated to consider moonshot concepts as a part of the strategic planning session planned for July 28.



# Decision Framework for Moonshots

July work session will include board review and discussion



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# Domain 3: Data

## Objective 3.1: Define Performance Measures & Data Goals for Each Priority Area

- Develop population-level and grant-level measures for each priority area to support decision-making and reporting.

## Objective 3.2: Establish Grant-Level Data Requirements

- Create a consistent, scalable approach for collecting performance data across the grant portfolio.

## Objective 3.3: Assess and Modernize Data Systems

- Identify gaps in the Trust's data systems and workflows and develop a roadmap for improvements.

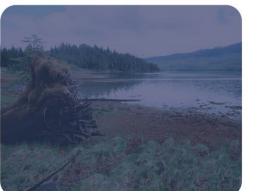
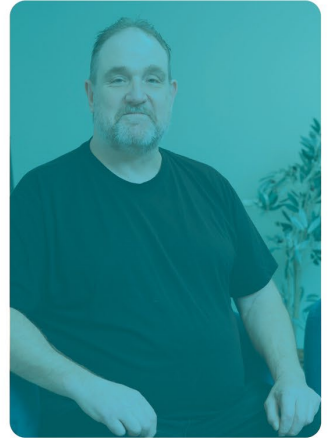
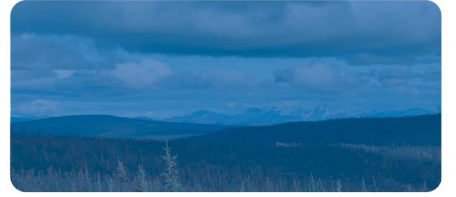
# Domain 4: Partners & Stakeholders

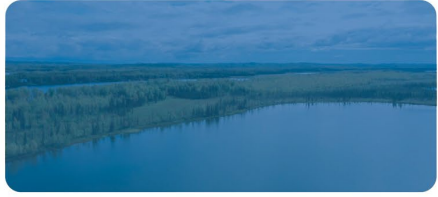
## Objective 4.1: Create Tools for External Communication of the Strategic Plan

- Provide staff with clear, consistent materials to explain the Strategic Framework and associated changes.

## Objective 4.2: Design a Structured Stakeholder Engagement Model

- Develop a consistent approach for gathering and using stakeholder input across the state.



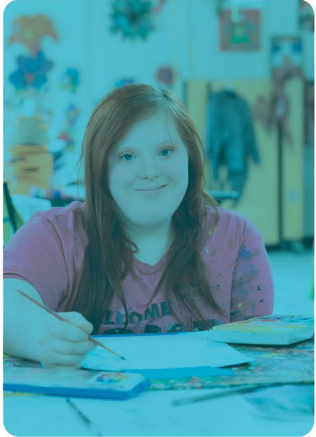


# Domain 5: Annual Operating Cycle



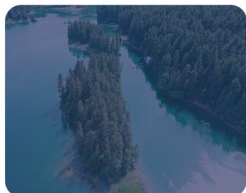
## Objective 5.1: Build and Adopt a Revised Governance & Annual Operating Cycle

- Create a predictable annual calendar that aligns grant processes, board deadlines, and reporting requirements to improve workflow.



## Objective 5.2: Clarify Budget Structure and Allocation Mix

- Set clear budget parameters and establish budgeting structures to support moonshots and emerging needs.



# Domain 6:

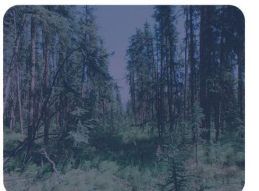
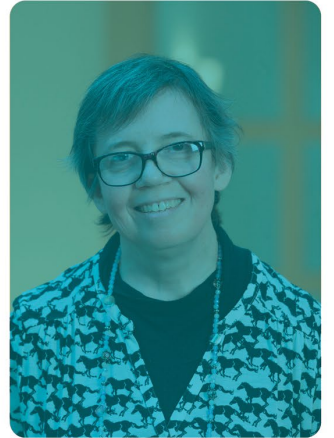
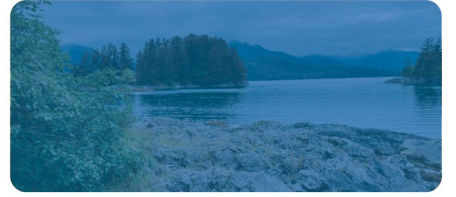
## Organizational Structure & Staffing

### Objective 6.1: Conduct an Organizational Capacity and Structure Assessment

- Evaluate internal capacity and structure, with external support, to define and prioritize organizational opportunities and gaps to implement the Strategic Framework.

### Objective 6.2: Align Staff Roles and Build Capacity for New Work

- Ensure the organization's structure and staffing align with the Strategic Framework and operational plan.





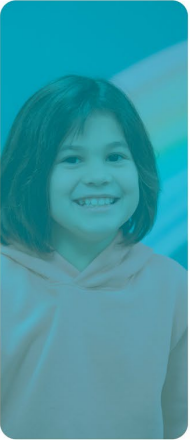
# Organizational Capacity Analysis



This analysis will help us objectively understand how work moves through the organization, where capacity is stretched, and where processes or unclear roles may be creating inefficiencies or risk.

Results of this work will give us the information we need to make thoughtful, sustainable decisions about our structure going forward

## Activities:

- 
- assessment of responsibilities and workload patterns
  - comparison of operational and strategic workload drivers to existing staffing capacity
  - workflow mapping across grantmaking, financial processes, and executive decision-making



# Strat Planning: Next Steps

- Staff is engaging in activities outlined in the Operations Plan
- Work plan with benchmarks in place
- Board will remain apprised of progress
- July 2026: Work Session with trustees re: moonshot(s)



# On the Horizon

- A0360 Trust regulations update
- Next AMPS work session to be scheduled
- Work with TLO and partners on next steps for the TAB and E. 20<sup>th</sup> (CSS) building
- Continued progress on FY28 budget recommendations
- Ongoing engagement with State on RHTP
- Beneficiary Listening Sessions, June 2 & June 30
- Trust Improving Lives Conference, Sept. 17-18
  - Call for speakers currently open through May 28
- Budget transmittal to SOA by Sept. 15 statutory deadline



**Apply to Speak**  
September 17-18, 2026  
Improving Lives Conference  
The Alaska Mental Health Trust Authority

**Trust Beneficiary Listening Sessions**  
Tuesday, June 2, 2026, 12:00 p.m. to 1:00 p.m.  
Tuesday, June 30, 2026, 4:00 p.m. to 5:00 p.m.  
In person at the Trust Authority Building and via Zoom

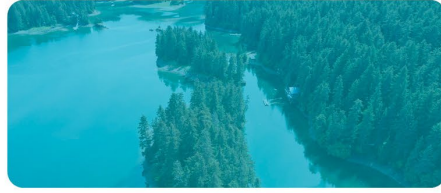
The Alaska Mental Health Trust Authority is inviting Trust beneficiaries to share their firsthand perspective of and experience with Alaska's system of care.

The purpose of this session is for the Trust to hear firsthand from Trust beneficiaries and/or their caregivers about their experiences seeking and receiving behavioral health and disability services in Alaska.

**What to expect:**

- Those who would like to share comments in person or virtually
- Comments will be limited to 5 minutes
- We will accommodate as many comments as practical in the time allotted
- An anonymized summary of comments will be developed and shared with trust stakeholders posted to the trust website

Written comments may be submitted by June 15 to [info@mhtrust.org](mailto:info@mhtrust.org). Please include "Listening Session" in the subject line.



Questions?

