



# Executive Report

Published by Mental Health Corporations of America, Inc. Fourth Quarter 2003

## Annual Meeting Will Deliver Message of Customer Service

**MHCA's 19<sup>th</sup> Annual Meeting** will be keynoted by Liz Jazwiec, nationally recognized speaker and consultant specializing in customer and employee satisfaction. Ms. Jazwiec will describe what it takes to build a culture where customer service is driven by satisfied, motivated employees. Before starting her consulting practice, our keynoter was the acting Vice President of Patient Care at Holy Cross Hospital in Chicago. In 1996 Ms. Jazwiec was instrumental in the hospital's achievement of *Fortune Magazine's* "Enterprise Award for Best Business Practices in Customer Service."

Our meeting will be held at long-time MHCA favorite beachfront property, The Don CeSar Resort on St. Pete Beach, Florida. Meeting dates are February 24-27. The Annual Business Meeting/Luncheon will be held Wednesday following the keynote and will include Chairman Dick DeSanto's "state of MHCA" report as well as a financial report by Treasurer Erv Brinker and a nominating report by Harriet Hall. Newly elected Board members will begin their terms at the conclusion of the Annual Meeting.

Thursday's general session program offers five presentations including two member showcases:

**"Incorporator Model"** - developing community leaders as advocates and fundraising sponsors. By MHCA member Ken Jue, CEO, Monadnock Family Services.

**"Case Management Training"** by Susan Markley, Coordinator of Staff Development, Dunn Mental Health Center.

**"Negley Award Presentations"** by the three finalists for 2004. These annual presentations describe proven programs that foster excellence in behavioral health risk management.

**"Essential Learning"** by Sue Erskine, a description of the company's web-based training center, customized for behavioral healthcare.



*Liz Jazwiec*

**"Benchmarking 2004"** - an invitation to participate in the second iteration of MHCA's *Benchmarks for Excellence in Behavioral Healthcare* product that examines and compares seven corporate measures.

In addition, Human Resource staff and interested CEOs are invited to participate Wednesday afternoon and all day Thursday in an **HR Focus Group** where such issues as best practice for HR, performance reviews, job descriptions and staff development/training will be addressed by panelists and further discussed in a forum format. Contact for the HR Focus Group is Linda Brannon, VP for Human Resources at Circles of Care in Melbourne, Florida ([lbrannon@circlesofcare.org](mailto:lbrannon@circlesofcare.org)).

That's the program - but you know the rest of it! Wherever MHCA members gather, there are ample informal opportunities for ideas to emerge and friendships to be enjoyed. Come to St. Pete for the learning *and* the fun! Hotel reservations deadline is January 22 - see details in Calendar on page 8. ❖

# President's Column by Donald J. Hevey

## Focusing Our Strategic Plan and Recrafting Our Mission Statement

Over the past several months, MHCA members carefully have studied our current Strategic Plan (2001-2003), measuring our progress toward identified goals and reassessing those goals for continuing emphasis. At the same time members have scanned the horizon in an effort to ascertain appropriate new efforts for the coming three years. My report on the current Plan appears in last quarter's *Executive Report*, and my hat is off to all of you for significant progress toward our stated goals.

In May and again in August when our Strategic Planning Group met, important preliminary efforts were made to shape a new Plan. Integral to the conversations was recognition that MHCA's 18-year-old mission statement might be a candidate for revision as well.

On November 4 we met in Scottsdale to complete the planning process. I am delighted to report that we accomplished exactly what we set out to do...we clearly and succinctly identified our goals for 2004-2006, *and* we thoughtfully "tweaked" our mission statement to clarify the emerging member-profile of this organization and specify our obligations to the membership.

Following are the newly defined goals of our Strategic Plan and the recrafted mission statement. Both are results of exceptionally good work done by all of you who participated in this sometimes frustrating, always challenging, and finally very, very successful process.



**Donald J. Hevey**

### MHCA Strategic Plan 2004-2006

✓ Advance strategic goals identified in the 2001-2003 Plan:

- ...Cultural Succession
- ...Branding/ Marketing
- ...Boundaryless Products and Services
- ...Benchmarking

✓ Advance benchmarking toward national health/behavioral health standardization

✓ Advance effective integration of physical/behavioral health

✓ Keep members informed on Public Policy

### Mission Statement

*MHCA is an alliance of select behavioral health organizations. It is designed to strengthen members' competitive position, enhance their leadership capabilities and facilitate their strategic networking opportunities.*

It's who we are. It's what we do. Thanks to each of you, it honestly defines a great organization.

### Board of Directors

#### Officers:

Richard J. DeSanto  
*Chairman*  
Susan D. Buchwalter, PhD  
*Vice Chairman*  
Ervin R. Brinker  
*Treasurer*  
Dennis P. Morrison, PhD  
*Secretary*  
Anthony A. Kopera, PhD  
*Director-at-Large*  
Harriet L. Hall, PhD  
*Past Chairman*

Donald J. Hevey, *President*  
& *Chief Executive Officer*

#### Directors:

Howard F. Bracco, PhD  
Wesley R. Davidson  
C. Richard DeHaven  
William C. Huddleston, PhD  
Gary Lamson  
Jerry Mayo  
Daniel J. Ranieri, PhD  
R. Thomas Riggs, ACSW  
Susan L. Rushing  
William J. Sette  
Harry Shulman, MSW  
David R. Stone, PhD  
Robert S. Ward

**MISSION STATEMENT:** MHCA is an alliance of select behavioral health organizations. It is designed to strengthen members' competitive position, enhance their leadership capabilities and facilitate their strategic networking opportunities.

**THE EXECUTIVE REPORT:** Information printed in the *Executive Report* does not necessarily represent the opinion or policies of MHCA. Content is intended for informational purposes only. The *Executive Report* is published four times per year by Mental Health Corporations of America, 1876-A Eider Court, Tallahassee, Florida 32308. Tara S. Boyter, Editor

### 8 MHCA 2003

**Mental Health Corporations of America, Inc.**  
1876-A Eider Court  
Tallahassee, Florida 32308  
Telephone: 850-942-4900  
FAX: 850-942-0560  
WEB PAGE: <http://www.mhca.com>

## Great New Members

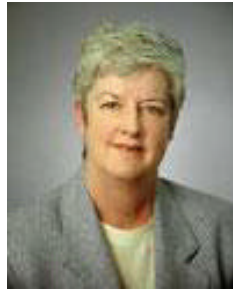
MHCA's Member Services Committee reports three new members joined in September, bringing our membership to a record high of 133 in 32 states.

We are very pleased to welcome back both Alliance for Community Care of San Jose, California and Pathways Center

for Behavioral and Developmental Growth of LaGrange, Georgia. Our first-time member is Thresholds, Inc. of Chicago, Illinois.

Alliance CEO is Vonza Thompson, who served there earlier as COO and replaced retiring exec Mary Hiland. Alliance was created in 1997 by four seed agencies which brought together well-earned reputations for providing quality service to adults, older adults and youth with persistent mental illnesses. Today with a budget of \$25 million, 500 employees and 300 volunteers, Alliance for Community Care serves over 4,000 people annually.

Continuing to lead Pathways is CEO Joan Turner. Pathways Center operates multiple facilities throughout southwest Georgia's Carroll,



*Vonza Thompson*



*Joan Turner*



*Dr. Anthony Zipple*

Coweta, Heard, Meriwether and Troup counties. Approximately 6,000 consumers are served annually by its numerous programs.

CEO Anthony Zipple, ScD, MBA of Thresholds, Inc. is the former COO of Vinfen Corporation in Cambridge, Massachusetts. He assumed leadership of the \$43 million Chicago-based Thresholds in June 3003, replacing Dr. Jerry Dincin, who retired at the end of 2002 after almost 40 years of executive leadership there. Dr. Zipple has authored 60 professional articles, chapters, and books, and given over 150 professional lectures and workshops on topics related to psychiatric rehabilitation. He is the Book Review Editor for the Psychiatric Rehabilitation Journal. ❖

## HPS Health Planning Source

*Health Planning Source  
proudly welcomes  
Craig M. Savage  
as  
Vice President and CEO  
October 1, 2003*

*Craig M. Savage  
Vice President/CEO  
Suite 100  
6320 Quadrangle Drive  
Chapel Hill, NC 27517  
919-403-3300, ext. 2  
craigsavage@healthplanningsource.com*

***Craig Savage** brings 23 years of experience in health care, including practice leadership roles with two national health care consulting firms and senior positions with a national accounting firm and a regional medical center in western North Carolina. Craig has expertise in strategic, clinical program and operational planning, as well as organizational design and development. His work has included mergers/acquisitions/affiliations, governance and management development, operational assessments, physician/medical staff organizational change, and new product/service development, largely to achieve/sustain top line revenue growth for his clients. He also has developed particular skills assisting community behavioral health providers and community-based agencies with assessing and implementing operational and strategic change.*

***Health Planning Source, Inc.**, is a consulting firm based in the Research Triangle area of North Carolina and dedicated exclusively to serving health care providers. For nearly a decade, Health Planning Source has served a diverse client base of hospitals and health systems, home health agencies, hospices, long-term care providers, and physician groups. Our services include:*

<i>Strategic Planning</i>	<i>Market Assessment</i>
<i>Service Line Planning</i>	<i>Business Planning</i>
<i>Clinical Service Development</i>	<i>Litigation Support</i>
<i>Certificate of Need Preparation</i>	<i>Merger-Acquisition Support</i>
<i>Physician-Hospital Integration</i>	<i>Medical Staff Planning</i>

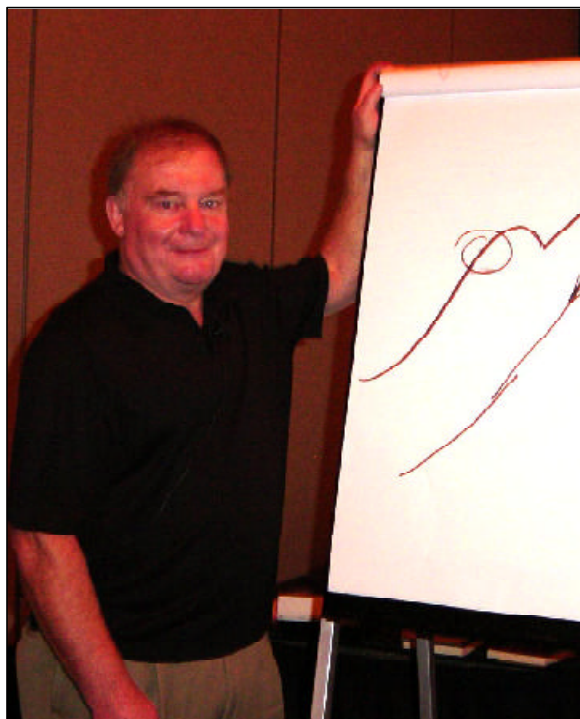
*Our relationships with affiliates also provide firm-to-firm coordination for:*

<i>Performance Improvement</i>	<i>Strategic Capital Planning</i>
<i>Reimbursement Consulting</i>	<i>Compliance</i>
<i>Audit, Assurance and Accounting</i>	<i>Facility Planning</i>

## Topics Both Visionary and Practical Presented at Fall Meeting

A return visit from futurist Nelson Otto scored a hit with members and guests who gathered November 4-7 in Scottsdale, Arizona for MHCA's 2003 Fall Quarter Meeting. Otto's Wednesday morning keynote explored the concept of "visionary management" and proved both enlightening and stimulating. In the afternoon's Futures Forum, Otto further refined his comments to address 12 horizon issues earlier identified by MHCA members. Otto's audience was engaged through thought-provoking visioning exercises in both the general session and the forum. Results of the process will provide continuing focus for our Futures Forum.

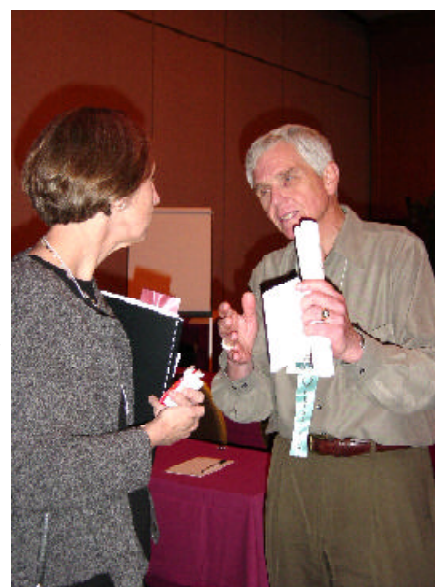
A half-day marketing focus group was also held Wednesday afternoon. Panelists introduced a variety of marketing concepts and provided practical examples of "things that work". The presentations offered CEOs and marketing staff an array of promotional techniques for both small and large CMHCs. Most important was the message that behavioral healthcare must embrace marketing in order to gain and ensure essential community awareness and support.



*Keynoter Nelson Otto encourages leaders to get ahead of the "curve" by creatively anticipating the future.*

Tuesday's New Trends Forum was well attended and served again as an important time for members to "tune in" to the state of behavioral healthcare across the country. Participants were reminded that far more commonalities than differences exist in the challenges and opportunities experienced by behavioral healthcare leaders regardless of geography!

Thursday's general session presentations earned equally high marks. Craig Savage and Brian Ackerman's report on their review of and update to MHCA's "Mergers Manual" was enriched by a description of case studies gleaned from recent interviews with MHCA members. Their findings will soon be published as part of a second-edition of the Manual.



*Mary Monnat of Tualatin Valley Centers quizzes David Dangerfield after his presentation on psycho-education intervention strategies.*



*Eli Lilly Company reps visit with David Ziegler (second from right) following his presentation on atypical antipsychotic medications.*



Long-time MHCA member/leader David Dangerfield, DSW fired up the session with his personal energy and entrepreneurial spirit as he described Valley Mental Health's "Psycho-Education Intervention Strategies." Among many comments on the presentation was an observation that "(this is)...a wonderful program and redesign to focus on recovery and resiliency."

MHCA members Dick DeSanto and Denny Morrison joined David Ziegler of Southeastern Consulting in his report on recent research into the value of atypical antipsychotic medications. Ziegler's participation was sponsored by the Eli Lilly Company, which also hosted Wednesday evening's reception. Thanks go to Lilly and their attending representatives - Judy Graham, Borden Wilson, Kim Derchak and Steve Wolfarth.

UNICARE Systems, Inc. was ably represented by Alicia Godshall and Jim Catan, who filled in when UNICARE CEO May Ahdab was unable to attend. Catan, Vice President for Consulting Services, gave an informative presentation on technological advancements available to clinical practice.

MHCA gladly welcomed five guest CEOs to Scottsdale. They are Larry Burch of Carmel, Indiana; Tod Citron of Smyrna, Georgia; Linda De Piano of West Palm Beach, Florida; Jan Eustis of Fort Myers, Florida and Jim Sleeper of Coatesville, Pennsylvania. We were especially pleased that new members Vonza Thompson of Alliance for Community Care in San Jose, California and Tony Zipple of Thresholds in Chicago, Illinois attended as well. ❖



*Presenters and consultants Brian Ackerman (left) and Craig Savage (right) visit with MHCA's Denny Morrison following their research report on recent behavioral health merger/affiliation experiences.*



*Unicare's Jim Catan and Alicia Godshall described technology "for the field" - pictured with MHCA's Information Systems Committee Chairman Grady Wilkinson.*



**Below:** Guest Tod Citron (left) visits with fellow Georgians Dennis Wool and Bill Parks and is joined by marketing presenter David Paine (second from left).

**Above:** Guest Jan Eustis is welcomed by MHCA Board Chair Dick DeSanto.



**Marketing Focus Group Presenters Did a Great Job!**  
Seated: Ali Sterling and David Paine - Standing: David Guth, Colleen Thayer, Dianne Flaherty and Linda Valianti.

# Risky Business

By *Act Corporation, Inc., Daytona Beach, Florida*

Winner: Board of Directors Award, 2003 Negley Awards for Excellence in Risk Management

Act Corporation has had strong safety and risk management components in place for quite some time. As a result of their monitoring processes, several issues came to light which caught the attention of the Vocational Services' leadership team. These included an increase in Workers Comp rates, a greater number of incidents reported, and feedback from Act's Safety/Risk Management Committee. As a result a full-fledged safety campaign was started. This campaign has improved the ability of Vocational Services clients to safely perform their jobs and has significantly reduced the incidence of on-the-job injuries.

## OVERVIEW OF ACTIONS TAKEN

### **Safety Training**

When a person is admitted to Vocational Services, safety is an integral part of their orientation process. The orientation handbook contains information relative to safety in the workplace. Job-specific safety training is provided as they move from one type of job to another.

Very specific training programs were developed for the off-site lawn crews and janitorial crews. These crews operate commercial mowers, trimmers, blowers, buffers, vacuums, and other potentially hazardous equipment. Training materials were designed to meet the varied educational levels of clients joining these crews, even with illustrative cues for clients who are unable to read. It is a progressive series of trainings - clients must demonstrate competency at each level before progressing to the next. Once completed, the clients receive a framed certificate stating that they are, for example, a "Lawn Care Specialist."

All clients receive the same Lifting Techniques training provided to Act employees during New Employee Orientation. It is then reinforced at the specific job sites, utilizing the actual equipment and challenges to which they are exposed.

Before being able to use power tools, clients must receive training and demonstrate their proficiency at safely operating each tool.

Safety is now an everyday concern. As training needs are identified they are immediately addressed with clients on that job at that time, then reviewed with other employees as soon as possible to ensure the lessons are learned by all.

### **Job-Specific Safety Concerns**

The leadership team evaluates potential safety issues inherent in particular jobs before agreeing to accept a job. Adaptations and special accommodations are made to ensure disabled workers can do the job safely.

Supervisors attempt to match a client as best as is possible to each particular job. At times, the ways in which job tasks are performed are changed to accommodate the disabled worker.

### **Working Environment**

Visual safety cues abound throughout all the vocational workshops. Huge safety banners herald Act's motto, "Safety Comes First", as do the faces of the clocks hung in a variety of locations. No matter where you are, just look around and you'll find some sort of safety-related message.

The Daytona Beach workshop maintains a large amount of product inventory. The workshop was rearranged to accommodate the inventory on one side, and the remaining side was designated for workspace only. This resulted in a decrease in the amount of clutter that could potentially create safety hazards.

Ergonomic issues were taken into consideration and appropriately addressed. Table heights were adjusted, and edges and corners of worktables were rounded.

Act utilizes a nationally recognized client satisfaction survey developed by MHCA's Mental Healthcare America. Each Act program has selected questions from the survey to focus on as potential opportunities for improvement. The

Vocational Programs selected "Safety of the environment" as their program-specific satisfaction dimension. It was hoped that if effective action plans were put into place, these plans would be drivers of improved client satisfaction in this safety-related area.

### **Communication**

"Safety" became a standing agenda item at the Vocational Program's monthly meetings. Satellite work site programs were drawn into the fold - at all contract work sites they address a "hot" safety topic each month. For example, they began to ask outside vendors to assist us in observing for safety concerns and providing us with feedback in this area.

Each and every injury report triggers a Supervisor's Review, no matter how minor the injury. Supervisors are charged with the responsibility to determine what happened and how to prevent reoccurrence. All Reviews are submitted to the Vice President of Vocational Services for his evaluation of the appropriateness of the actions taken before they are forwarded to the Safety Officer. The incidents reported each month are aggregated and analyzed in order to determine trends in potentially problematic areas.

The Vocational Program networks with nearly 20 similar organizations in the central Florida area to share information and find safer ways to perform comparable tasks and job functions. For example, adaptive devices to assist workers who are visually impaired or who cannot count have been devised for specific jobs.

In addition to information collected internally, we welcome feedback regarding safety issues from such funding and accrediting associations as NISH, RESPECT, JCAHO, and CARF.

### **Culture**

The Vocational Services leadership team delegated responsibility for ensuring the safety of all individual work environments to each work area supervisor.

The importance of investigation following all injuries, no matter how minor, has demonstrated management's commitment and concern regarding the safety of all clients and employees.

Clients are strongly encouraged to take pride in the way they perform their jobs, and the quality

of their work has directly translated to safer work practices and safer work environments.

### **RESULTS**

A tremendous amount of effort was dedicated to ensure clients and employees a safe and healthy place to work. But what was the end result? Let's let the numbers speak for themselves as presented in the three Figures following on page 8.

All injuries are documented on Occurrence Reports and then coded and tracked through Act Corporation's Performance Improvement Department. Those coded as "Serious" are injuries that require medical attention. Figure #1 indicates that there has been a steady and substantial decline in serious injuries reported between 1999 and 2002. (Note: 2002 data is year-to-date projections based upon 10 injuries between 01/01/02 and 10/31/02.)

All Act programs utilize the MHCA Client Satisfaction Survey to assess client satisfaction with services provided. One question specifically asks clients to rate the question "Safety of the environment" on a scale from 1-5, (1=Poor and 5=Excellent). Figure #2 shows results taken from Act Corporation's Annual Performance Improvement Report. The data presented indicates that our clients perceive the workshops to be a safer work environment.

Figure #3 demonstrates the substantial improvement in Act's Workers Compensation Loss Ratio between the years 1999 and 2002. In addition, Act Corporation did not receive any recommendations related to environment of care standards during our February 2001 CARF survey or our April 2001 JCAHO survey.

### **CONCLUSION**

It should be noted that the results provided demonstrate significant improvements in safety performance during a period when exposure to risk has increased. Each of our workshops has grown in size, and the nature of sub-contract work has constantly changed, providing extraordinary training challenges to front line supervisors. Similarly, our off-site grounds maintenance and custodial contracts have expanded significantly, and we now employ

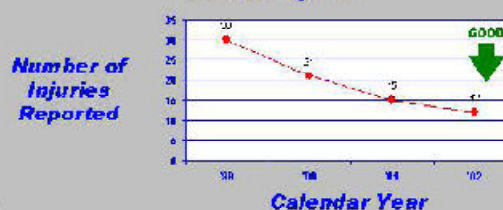
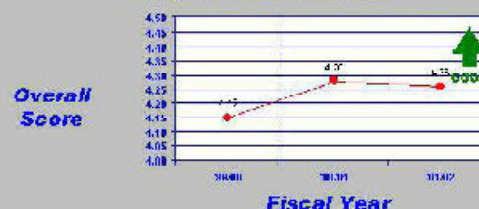
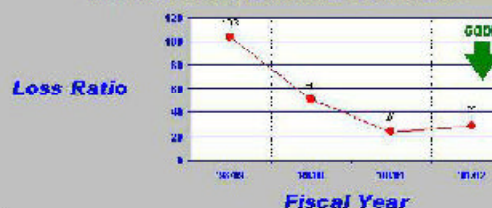
*See Risky Business, page 8*

**Risky Business, continued from page 7**

approximately 130 people who are exposed to risk seven days a week, 24 hours a day. In all, Vocational Services has over 300 employees, approximately 75% of whom are severely disabled. They have not only fulfilled their mission of creating employment opportunities for this segment of our community, but have evolved their safety program to provide the safest possible work environment for their especially vulnerable workers. ❖

**About Act**

Act Corporation, headquartered in Daytona Beach, Florida, is a community mental health center serving Volusia and Flagler counties. Incorporated in 1965 as a 501(C) 3 not-for-profit corporation, Act received the third grant issued by NIMH under the Community Mental Health Centers Act of 1963 to establish comprehensive mental health services. Act employs nearly 400 full time staff and facilitates employment for 360 disabled adults in sheltered work, supported employment, and affirmative business ventures. Act has three major lines of services - to adults with serious mental illnesses; to adults with addictions and criminal involvement; and for children, those at risk for delinquency and those with serious emotional disturbances. With an annual operating budget of \$19.6 million, Act is one of the largest community mental health centers in Florida.

**Vocational Services Occurrence Reports - Serious Injuries****Vocational Services Client Satisfaction with "Safety of the Environment"****Act Corporation Workers Compensation Loss Ratio****Member Survey Affirms, Recommends**

MHCA's recent member survey affirmed members' satisfaction with meeting content and locations, our multi-targeted listservs, our website, and membership dues rates. Of 15 member benefits identified by respondents, the top four were Networking/Validation, Formal presentations, Informal learning (member-to-member) and the online ListServ. Also mentioned were MHCA products (e.g. Customer Satisfaction Management System, Benchmarking product, MHRRG), Committees/Forums, and the generally positive atmosphere of the organization.

Some said, however, that members should provide a more welcoming atmosphere for new members. Most members enjoy close friendships within the organization and look forward to meetings where they can reconnect. As a result, new members and guests may feel excluded. Therefore, the Member Services Committee will initiate a more intentional "mentoring" effort and calls on all members to "set out the welcome mat."

In response to the survey, the Committee also recommended increased investment in keynote presentations so that additional first-rate speakers can be invited to address MHCA. ❖

**Calendar****MHCA 2004 Annual Meeting**

Dates: February 24-27, 2004  
 Location: The Don CeSar Beach Resort & Spa  
 St. Pete Beach, Florida  
 ☎ (800) 282-1116  
 Rate: \$209 single/double  
 Registration Deadline: January 22, 2004

**NCCBH Spring Training Meeting**

Dates: February 29 - March 2, 2004  
 Location: The Fairmont Hotel  
 New Orleans, Louisiana  
 Information: [www.nccbh.org/neworleans](http://www.nccbh.org/neworleans)  
 ☎ (301) 984-6200

**MHCA 2004 Spring Meeting in conjunction with IIMHL Conference**

Dates: May 20-22, 2004  
 (May 17-18: site visits+ May 19: Travel)  
 Location: Omni Shoreham Hotel  
 Washington, DC  
 ☎ 1-800-843-6664  
 Rate: \$189/single or double  
 Registration Deadline: April 26, 2004