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## Striving for “Optimal” Behavioral Healthcare

*From the Desk of Dale Shreve,  
mhca President & CEO*

**mhca** is an association of high-performing behavioral healthcare organizations. While there are no one-size-fits-all criteria, there is general consensus that high-performing organizations consistently deliver meaningful, measurable, and financially sustainable results for the people or causes they exist to serve. With significant variability in funding, geography, services, populations served and required outcomes - how do **mhca** members define successes at their organizations? How do they measure it? How do they compare with one another?

To answer some of these questions and help members benchmark themselves against their peers, Afia administered the Optimal Behavioral Healthcare Organization survey in September. Fifty-seven **mhca** organizations participated in the survey and Afia reported the results during our Fall Conference in Atlanta. It was no surprise that most organizations had areas of strength and weakness, with gaps that focused on one of the specific

functional areas. It was also no surprise that 40% of respondents feel their EHRs aren't properly supporting clinical decision making. We regularly engage in conversations about our pain points and share ideas for improvement, but true benchmarking has been challenging.

Gift and Mosel (1994) define benchmarking as “the continual and collaborative discipline of measuring and comparing the results of key work processes with those of the best performers.” The ultimate objective for us being to identify areas to either move the needle, or champion relative success to secure support from potential funders and community leaders.

Benchmarking has been around for more than 40 years, but behavioral



*Dale Shreve*

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# Member Spotlight: Peggy Chase of Terros Health



*Peggy Chase with husband Ron*

Peggy Chase, **mhca** board member and CEO of Terros Health, has been on a journey full of unique and interesting experiences and has proven she's up for any challenge, whether it be transitioning her organization to whole person care or photographing bears in the Alaskan wilderness.

The second of four daughters born to a preacher who also adopted four more daughters, Peggy moved frequently throughout her childhood as her father planted churches. She moved 12 times during her childhood, including 4 years spent in Canada. While moving was sometimes tough and she was especially unhappy about moving her senior year of high school, she says that challenging experiences can build character if you let them.

Peggy claims Paw Paw, Michigan as her hometown. This is where she and her husband Ron, whom she has known since childhood, ran a 700-acre farm while raising their two sons. Looking back, she says the complexity of farm accounting, measuring the production of every cow, sow and field, was great preparation for managing the complexity

of behavioral healthcare funding.

The farm crisis of the 80's pushed Peggy and Ron to explore other opportunities and she put her background in finance and operations to work as a Chief Financial Officer of several companies before finding her way to behavioral healthcare. She served as Chief Financial Officer and Chief Operations Officer of Terros Health for 12 years and was appointed as CEO in 2011.

Under her leadership, Terros Health has nearly tripled in size. Peggy is proud that Terros Health touches over 50,000 people each year and has transitioned eight locations to deliver integrated whole-person care. She's particularly fond of the holiday season because she gets to be involved with Santa's visits to the sites. "Seeing the impact the organization has on patients is a real gift," she said.

Her best advice for the newer CEOs she mentors, "Have a clear purpose and vision and define your core



*Off-roading in Arizona*



*Glacier hiking in Alaska*

values." She recommends keeping the vision and values simple, since people remember things in 3's and 5's, and keeping them in front of you at all times. "By reflecting on them every day, letting them guide your decisions, and repeating them to your team at every opportunity, they will become a part of your organization's heart," she said.

Her transition to CEO wasn't all smooth sailing. "After coming up through the ranks, it was hard to let go of what I used to do as CFO and COO. I had to realize that by hanging on to those things, I was holding my new people back rather





*Grizzly bears at Brooks Falls*

than empowering them,” she said. After working with an external consultant, she recently began re-reading *What Got You Here Won't Get You There* with her leadership team and exploring intrinsic motivation and employee empowerment.

She has learned a lot from her **mhca** peers during her more than 20 years as a member, but there is always more to learn. “Maintaining financial viability during these times of tremendous fast-paced change is a challenge, and this is also an exciting time. Behavioral health is unique with caring for people; and, adding primary care and seeing beautiful effects and enormous change in people’s lives is truly rewarding,” she said.

In recent years, Peggy has appreciated the relevant topics presented during **mhca** conferences to push members toward excellence, and to try new things in order to stay competitive. “While Terros can’t implement all the ideas, hearing about all the ways people are pushing the envelope keeps us moving forward,” she said.

In talking with Peggy, you may notice her infectious energy that inexplicably leaves you feeling simultaneously calmed, heard and understood but also challenged, inspired and invigorated. I don’t know how she does it – perhaps it’s

a byproduct of her zest for life, her passion for her work, or her heart for serving others – but you can’t talk with Peggy for any length of time and not be affected.



Her many industry accolades are a testament to the high caliber of her leadership. Az Business

and AZRE magazines recognized Peggy as one of the most influential women in Arizona and honored her with the Outstanding Healthcare Executive award last year saying, “She leads more than 1,000 employees with a compassionate leadership style that seeks to mentor, coach and grow new leaders.” In 2017, her alma matter, Arizona State University, bestowed upon Peggy the Leadership in Services Award recognizing her for 30 years as a progressive healthcare leader and innovator saying, “She has positively impacted healthcare and behavioral health public policy through her participation on local, state, and national boards and committees.”

Outside of work, Peggy has many exciting hobbies and hidden talents. She enjoys playing piano, off-roading, hiking and wildlife photography – though her love of the outdoors once nearly killed her. She was walking in the National Forest in Arizona with her family when she stepped over a rock and startled a rattlesnake. It struck her bare ankle four times. She was flown to a poison control hospital where she had to fight for her life and almost lost her leg.

Still an adventurer and nature



enthusiast, she loves spending time in Yellowstone National Park and Brooks Falls in Katmia National Park in Alaska, where she hones her digital photography skills while enjoying the outdoors. ■



*Salmon fishing in Alaska*



*Moose sighting in Alaska*



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# New Faces & Places

Welcome our new members and keep an eye out for these new CEOs at future conferences!

**Casa de los Niños** was founded in 1973 to protect children from child abuse and neglect. Since then, it has grown and expanded to provide a variety of innovative prevention and early-intervention programs for children and families including behavioral and mental health treatment services and immediate crisis mediation.



*Susie Huhn*

CEO **Susie Huhn** is respected throughout Arizona and around the country for her extraordinary work with children, families and communities.

She is past president of Prevent Child Abuse Arizona, serves as advocacy chair for the Arizona Council of Health and Human Service Providers, and is a board member of the National Council for Behavioral Health. She earned her BS in Education from the University of Arizona and a Master of Arts in Organizational Management from the University of Phoenix.

**Spurwink** began in 1960 with one house in Portland serving eight boys whose developmental needs could not be met at home or in public school. Today, Spurwink serves over 8,000 people each year through the good work of 1,150 employees throughout Maine. Their mission remains to provide exceptional, evidence-based behavioral health and education services for children, adults, and families so they can lead healthy, engaged lives in the community. Spurwink recently merged with Commu-

nity Partners, Inc., a nonprofit provider of services to adults with autism and developmental disabilities, to expand adult services and add valued expertise from 300 new employees. They also recently launched a Behavioral Health Home service, offering a team-based approach to outpatient care.



*Eric Meyer*

Behavioral Health Group at APS Healthcare and was responsible for operations at service centers located in Maine, Massachusetts, Maryland, California, Georgia and Florida. Eric is a Licensed Clinical Social Worker and has worked for many years in the Maine behavioral health provider community in a variety of roles, from therapist to program director. He obtained his MSW from the University of Maine and his MBA from the University of Southern Maine. Eric and his wife tend a small flock of chickens, some alpacas and a couple of horses on their small farm in Whitefield.

**Southwest Behavioral & Health Services** employs over 800 full-time staff committed to the development and delivery of services in the areas of housing, residential care, prevention services, and outpatient services to children, incarcerated persons and dually diagnosed adults in the Phoenix metropolitan area, rural Maricopa County, Gila, Pinal, Mohave, Coconino, and Yavapai counties.

**Steven Sheets** held several po-



*Steven Sheets*

coming a children's services supervisor. He then served as a program coordinator, and soon after was promoted to a program director. He most recently served as Vice President of Outpatient Services, and then Interim CEO. Steven earned his bachelor's degree from Grand Canyon University and his master's in professional counseling from Ottawa University. Born and raised in Phoenix, where he still currently resides, Steven enjoys traveling, running, cooking, and playing guitar and singing in his free time.



*Jennifer Craig*

sitions at Southwest Behavioral and Health Services prior to his appointment as CEO. He interned for the residential program before be-

**ReDiscover** has a 50-year legacy of providing innovative and compassionate care through comprehensive programs serving men, women and

children whose lives have been affected by mental illness and/or substance use disorders. ReDiscover's inpatient hospital diversion program was so successful it was replicated statewide by the Missouri Department of Mental Health, and ReDiscover is in the process of opening the first behavioral health urgent care center in their area.

**Jennifer Craig** has more than 25

*Continued Page 7>>*

# Celebrate in Clearwater Beach!



It's finally here! After much anticipation, **mhca** is excited to recognize our 35th anniversary with a year-long celebration of the power of association to fuel innovation in behavioral healthcare.

We will be honoring our past by sharing organizational history via articles, trivia and flash-back photos throughout the year, and we'll be defining our future together during discussions and activities at each of our quarterly conferences.

All of our founders and retired member CEOs are invited to join us at our Winter Conference and Annual Meeting in Clearwater Beach March 3-5, where we will recognize those who've contributed to making **mhca** the elite association it is today.

We will kick off our agenda by launching an all-new series called Innovation Expos. These sessions will feature brief, somewhat raw, presentations from **mhca** members engaged in innovative initiatives on which they welcome your questions, input and feedback. Come prepared to engage in lively discussion with some of the brightest minds in the industry.

On Wednesday, we'll announce our new board members and review our progress toward association goals, then Monica Oss of Open

Minds will take a look at the health and human service field over the past three decades and discuss the implications of the past on the future of the behavioral health field. In addition to the 'walk down memory lane' of the key developments - and key players - in the mental health and addiction field over the past 35 years, we'll discuss the events and trends that will likely shape the future of treatment for consumers and the organizations that serve them.

On Thursday, nationally-renowned business advisor and author John Spence will predict the future of work and how leadership will evolve to meet new demands.

We'll also hear from a panel of **mhca** retirees about their memories of **mhca**, how membership influenced their careers, how they planned for and adjusted to this new phase of life, and what they wish'd they'd known before taking the leap.

Our generous sponsors and exhibitors are providing great activities and amenities for attendees to enjoy, from morning fitness classes and afternoon chair massages, to special snacks and a beach-front celebratory reception and buffet dinner. You're guaranteed to have a great time and leave feeling not

only informed, but refreshed!

Our hotel room blocks at the Sandpearl Resort and Opal Sands Resort are sold out, but if you are currently on our waiting list, we are working hard to get you into the blocks.

If you have any questions about your status, or you need to change or cancel your reservation, please contact Gena at [gmatthews@mhca.com](mailto:gmatthews@mhca.com). ■



*Jim McDermott & Bob Quam, 1988*

TRIVIA: What city has hosted more **mhca** conferences than any other (10 conferences over the past 35 years)? What city is the runner up - having hosted us 9 times?

The first member to email us with the answer at [lparizek@mhca.com](mailto:lparizek@mhca.com) will receive a \$10 Amazon gift card. Good luck!



Continued from Page 5>>

years of experience in behavioral health services working in community, residential and outpatient settings as a therapist and administrator. She received her BS from Northwestern University, her MA in Counseling Psychology from Trinity International University, and her MS in Organization and Management from Capella University with a specialization in HR Management. She is a Licensed Clinical Professional Counselor in Illinois, a Senior Professional in Human Resources and a Society for Human Resource Professionals Senior Certified Professional. As President & CEO, she provides visionary leadership for ReDiscover in the delivery of mental health and substance use disorder services to help individuals and families achieve healthier and more productive lives.

After a nation-wide search, **Roger Osmun**, a Pennsylvania native, was named the new CEO at **West Central Behavioral Health** in New Hampshire. He brings 20 years of



Roger Osmun

experience as the chief clinical officer and two as chief operating officer at Holcomb Behavioral Health Systems. He has also served as an adjunct professor at Immaculata University and developed an APA-accredited doctoral psychology internship program. He holds a bachelor's degree in psychology from the University of Rochester (N.Y.) and a doctorate in clinical psychology from Temple University in Philadelphia and is a licensed psychologist in Pennsylvania and Delaware.



Don Savoie

**Don Savoie** succeeded Maggie LaBarta as President and CEO of Meridian Behavioral Healthcare. Many of you already know Don, as he has been at-

tending **mhca** conferences for some time. With over 30 years of industry experience in mental health, including the last eight as COO of Meridian, Don was a strong internal candidate. He is enthusiastic about the future and excited about the changing awareness and public discussion as it relates to mental health and substance use disorders as 'healthcare'. ■

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healthcare has lagged behind other industries in employing benchmarking, in large part due to variability in outcome measures throughout the industry and a lack of resources to invest in the effort – but times are changing. In an environment of increasingly limited resources, organizations that can demonstrate their impact will be the ones most likely to attract the resources and talent essential for continued viability. Movement toward integrated care and value-based purchasing is compelling providers to identify better mechanisms for ongoing performance improvement, while EHRs, HIEs and other advancements in technology are making it easier and more affordable to aggregate and routinely analyze data. Combined, these circumstances have resulted in a renewed interest in benchmarking in behavioral healthcare.

In the context of behavioral healthcare, benchmarking is not limited to clinical outcomes – it can also address diverse elements of services such as costs, staffing requirements, and wait times. Although benchmarks can be based on data collected within an organization, such data are of limited scope. Some relevant national data is accessible online from Health Resources Services Administration, AHRQ National Quality & Healthcare Disparities Reports, The Center for Quality Assessment & Improvement in Mental Health, Dartmouth Atlas of Healthcare, and the NASMHPD Research Institute.

In 2002 **mhca**, through the National Data Center and the Benchmarking Improvement Committee, developed the Corporate Benchmarking Survey to collect data on a number of key operational, staffing, and financial

indicators that are common to nonprofit community behavioral health centers. This effort was intended to help individual participating mental health centers compare their own organization to a larger sample and to spur the sharing of best practices and fuel innovation. The intent was to repeat the survey on a regular basis so that organizations could continue to evaluate the impact of their efforts; however, it seems this initiative was implemented before its time, as it encountered some challenges and was discontinued in 2015. Still, it was valuable in that we learned some lessons applicable to anyone undertaking benchmarking initiatives:

1. How we define things matters. Definitions of metrics should be clear and precise to minimize ambiguity, promote understanding, and ensure valid comparisons both internally and

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externally over time.

2. Trust and effective, ongoing communication are key – benchmarking requires a relatively open exchange of information.

3. Start with a small project that impacts a critical area. If it takes too long to agree upon measurable outcomes, or more than 6 months to complete a project, enthusiasm wanes.

While it's informative to know where you stand on measures of time, quality and cost, benchmarking isn't worth the effort if you don't follow through with action plans to address identified gaps. Benchmarking is a complex and evolutionary process influenced by organizational capacity and commitment – you need the right team and tools to do the job.

Internal benchmarking is a low-risk starting point that allows you to become familiar with the process, but restricts you to a limited supply of internal ideas. Internal benchmarking compares individuals or teams against each other to help set standards and identify best practices as well as training needs and areas for improvement in clinical or administrative measures. It has the benefit of ease of data collection and requires less time and money compared to competitive and functional benchmarking. Once familiar with the process, competitive and functional benchmarking are more desirable because they offer greater opportunity for significant improvements.

All forms of benchmarking are designed to help identify best practices - and implementing those practices in new areas or organizations will require some level of adaptation. Simply copying off your peers is discouraged



Did you hear what your **mhca** peers said during the session on high-functioning organizations? There was excellent audience participation in the discussion - including the following comments from Jamie Stewart, CEO at Grafton:

*"We noticed that we didn't like our assessment data around assessment 3 or 4 because it was showing high recidivism. We initially thought it was bad data, but found that the only children we were serving getting to assessment 3, 4, or 5 were those that came in with much more severe needs and starting on higher levels of care; so, these children were making progress, just not as much as those we'd already discharged, which was skewing our numbers. Sometimes, when you don't like the data, it's about how you're looking into the data to get answers about why the changes in data are there."*

because what is best for one organization could be disastrous for another. For example, the "best" way to implement an evidence-based best practice for treating schizophrenia may be different from one organization to another, depending on their unique circumstances.

Benchmarking allows us to show how our organization can meet criteria for categories of care provided, but it also allows staff to really see how meaningful their work is, how they impact client outcomes and organizational operations, and how they are performing against their goals and their peers. For these reasons,

benchmarking is often embraced and can actually raise morale and improve staff retention, which in turn improves service delivery and patient care.

As Matt Hoffman, Managing Partner at Afia, has said, the key condition for a data-driven organization is a culture that embraces the enormous value of its data and is committed to using compelling data to make constructive change.

As you embark upon, or continue, your benchmarking journey, **mhca** is here to help - just tell us what you need to become an optimal behavioral healthcare organization.

# Exuberant in Atlanta

What a great time we had in Atlanta! From the location, to the sessions, to connecting with peers - evaluations indicate this was one of our best conferences yet. Our top-rated sessions were: High-Functioning Organizations: **mhca** Survey Results and Discussion, during which Matt Hoffman and Melanie Elliot from Afia reviewed the results of the *Optimal Behavioral Health Agency Survey* and top-performing respondents shared some of their strategies; Driving Staff Performance: Developing Balanced Performance Scorecards for Improved Outcomes, presented by Sandy Hall of Lighthouse Telehealth and Katie Morrow from Streamline Healthcare Solutions;

the general and breakout sessions on healthcare disruption led by Ann Christensen; and, the Leadership Incubator on How to Lead Partner and Ensure Performance in the Shift to Value-Based Payments, led by Paul Duck.

Core EHR Solutions provided all attendees with a copy of *The Innovator's Prescription* so they could continue learning about disruptive solutions for healthcare following the conference.

Whether you attended in Atlanta or not, we encourage you to check out the high-quality recordings of all of our general sessions at [mhca.com](http://mhca.com) under Documents - Conference Presentations. You can watch

sessions you missed, rewatch the ones you loved, and also share with your team!

Learning is the primary focus of our conferences, but it's not restricted to session rooms. Our members love getting to know each other during receptions and activities, and we all benefit from sharing both our pain points and best practices with each other.

When you incorporate learning and playtime, that's where the real magic happens. Some of the fun activities we incorporated into our Fall Conference included a leadership networking lunch on Tuesday sponsored by Owl Insights, followed by a group outing of 30



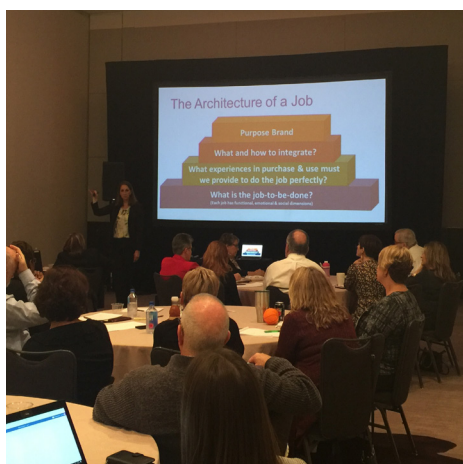
Chris Wyre & Bill Guptail



Sarah Mickus, Matt Hoffman & Dale Shreve - Go BLUE!



Angie Hampton & Julie Pratt



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*Terri Wilson*



*Rick Doucet*



*Bill Henricks*

members to the historic Fox Theatre to see the Broadway musical *Wicked*; a Paws for Playtime event on Wednesday featuring adoptable dogs from Paws Atlanta, a local no-kill animal shelter, followed by a tailgating-themed reception that encouraged attendees to show their team spirit - both sponsored by Genoa Healthcare; and, a contest to see who would end up with the longest sash of fun ribbons attached to their name badge on Thursday

night. No one came close to Summer Dean's total of 28 ribbons!

All-in-all, another invigorating and fun-filled conference in the books. If you have any thoughts on speakers, session topics, or group activities for our future conferences, we'd love to hear from you - email Dale at [dshreve@mhca.com](mailto:dshreve@mhca.com) or give us a call at 850-942-4900.

We have a great line-up for 2020, and we hope to see you soon. ■



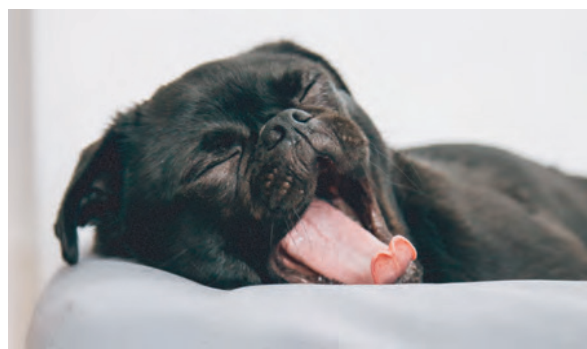
*Cathy Barnes*

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## *Save the Dates!*



We have some exciting plans for 2020. Don't miss out - make plans now to join us for

each of our quarterly conferences! You can book rooms now and keep an eye out for emails concerning fun activities and conference registration about 90 days prior to each conference. Questions? Just give us a call at 850-942-4900. See you soon!

### **Winter Conference**

**March 3-5, 2020**

**Sandpearl Resort**

**Clearwater Beach, Florida**

Reservations: 866-384-2995

Hotel Group Rate: \$304

Reservation Deadline: Feb. 1

### **Spring Conference**

**May 19-21, 2020**

**Westin Copley Place Boston**

**Boston, Massachusetts**

Reservations: 617-262-9600

Hotel Group Rate: \$289

Reservation Deadline: April 25

### **Summer Conference**

**August 11-13, 2020**

**The Pendry San Diego**

**San Diego, California**

Reservations: 619-738-7000

Hotel Group Rate: \$299

Reservation Deadline: July 9

### **Fall Conference**

**October 13-15, 2020**

**The Peabody Memphis**

**Memphis, Tennessee**

Reservations: 901-529-4000

Hotel Group Rate: \$246

Reservation Deadline: Sept. 10