

Executive Report

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Strategic Planning Will Be Focus of Spring Conference

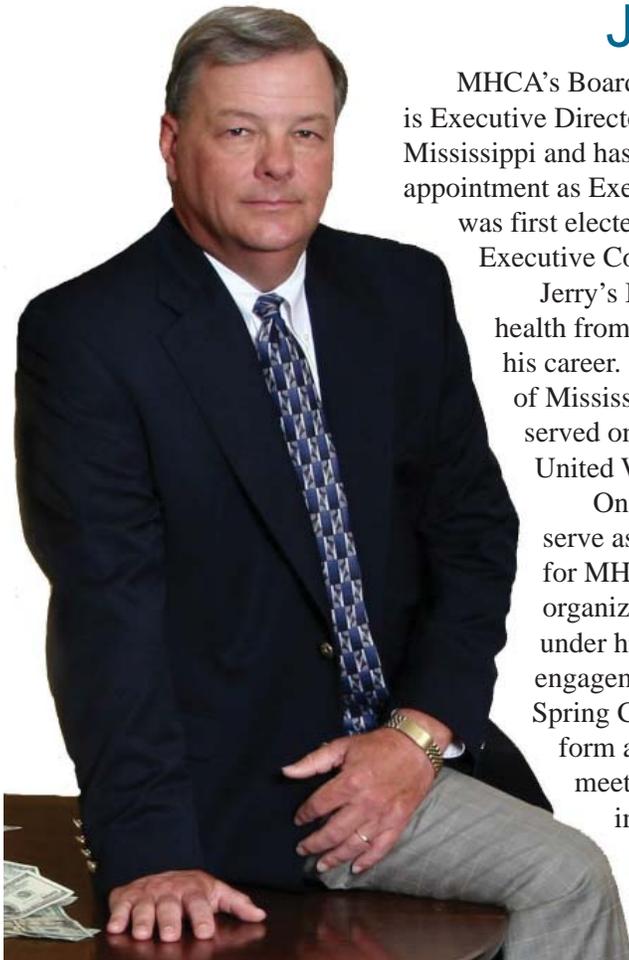
Are healthcare reform forces so far beyond our control and of such size that no amount of planning can allow for them? Monica Oss, President of Open Minds, raises similar questions while simultaneously providing healthcare strategic planning consultation on a regular basis (*see article, page 4*). She, with Open Minds Senior Associate, Steve Ramsland, will facilitate MHCA's

2013-2015 Strategic Planning initiative beginning in May at our Spring Conference in Savannah, Georgia. Members are invited to participate in one of four sessions to address issues central to the success of local providers and the behavioral healthcare delivery system at large and thus key to MHCA's core efforts over the next three years.

MHCA's conference dates are May 21-24. We will convene at the Westin Savannah Harbor, one of the city's premier hotels. The hotel reservation deadline is April 25, and our preliminary conference agenda is posted online and has been sent to members by mail.

First on the agenda Tuesday is the Mental Healthcare America

See Spring Conference, p. 8



Jerry Mayo Chairs MHCA Board

MHCA's Board of Directors has elected Jerry Mayo as its 2013 Chairman. Mayo is Executive Director of Pine Belt Mental Healthcare Resources based in Hattiesburg, Mississippi and has been associated with Pine Belt for more than 20 years. Prior to his appointment as Executive Director in 1998, he served as Chief Financial Officer. He was first elected to MHCA's Board of Directors in 2002 and has served on the Executive Committee since 2008.

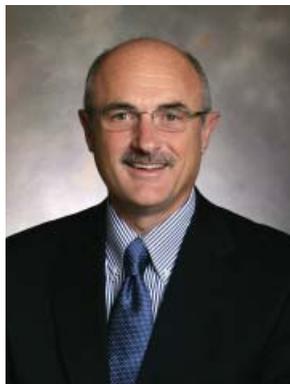
Jerry's Bachelor's degree in business administration and Master's in public health from the University of Southern Mississippi have served him well in his career. In addition to his MHCA leadership, Jerry is the current president of Mississippi's Association of Community Mental Health Centers and has served on the Board of Directors and Funds Distribution Committee for the United Way of Southeast Mississippi.

On accepting his new MHCA position, Jerry said, "I am honored to serve as Board Chairman in partnership with Dale Shreve. The opportunities for MHCA, particularly given the rate of industry change, are many. Our organization has selected a very capable leader in Dale. Our first task under his leadership will be development of a new strategic plan. Member engagement in this process is critical, and I encourage you to attend our Spring Conference in Savannah. The value of MHCA is the relationships we form and the information sharing that takes place before, after and during meetings. For the strategic plan to adequately address our collective interest, your input is imperative. Please join us in Savannah!"

Elected with Jerry are Chris Wyre, Vice Chairman; Inman White, Treasurer; Diana Knaebe, Secretary; and Dale Klatzker, Director-at-Large. Past Board Chair Susan Rushing and CEO Dale Shreve also serve on the Executive Committee.

Transitions

From the desk of Dale Shreve, MHCA President and CEO



I'm happy to be here in Tallahassee, and I'm honored to be MHCA's new President and CEO. I'm looking forward to getting to know each of you better and working closely with you as we collaborate to make MHCA our Association of Choice.

Webster defines transition as "a movement, development, or evolution from one form, stage, or style to another." It's clear that our industry, our organizations, and our Association are facing some of the biggest transitions many of us have ever witnessed.

Our country's demands for healthcare reform and the Affordable Care Act have precipitated a host of possibilities for transitioning our industry – many of these having State specific implications. You are diligently working to position your organization to be successful in this somewhat uncertain, evolving, health and human services marketplace. And it's not just about understanding the new mandates, expectations, opportunities of healthcare reform and having a plan to address these issues – it's also about having the means (capital, workforce, partnerships, market presence and acceptability) to successfully implement your response.

MHCA is here to help you. But first we need your help. MHCA was conceived 28 years ago as an Association to enhance the strategic business position of a group of entrepreneurial mental health center executives. Since that time MHCA has grown and accomplished much. However, the environment that MHCA's 129 member organizations and their CEOs find themselves in today is dramatically different than what our founders were experiencing almost three decades ago. This environmental reality, coupled with the transition of MHCA staff and board leadership, demands that we ensure a shared vision and alignment of effort. We need a new strategic plan, and we need your involvement in the creation of this plan.

MHCA has contracted with Open Minds to facilitate the development of our next strategic plan. At our May conference in Savannah, Monica Oss and Steven Ramsland will be with us and will be conducting focus groups to gather your input into the formation of this new plan. Every member CEO who attends the May conference will have the opportunity to participate in a focus group. I hope to see you all in Savannah and I look forward to your insight and input into MHCA's transition.

Dale E. Shreve

MHCA MISSION STATEMENT

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

THE EXECUTIVE REPORT

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129 Members in 31 States

Welcome Serenity House

Added to MHCA's membership in January is Serenity House Counseling Services, Inc. of Addison, Illinois. We are especially pleased to welcome Serenity House and its new CEO, Lisa Labiak, formerly Vice President for Development and Corporate Communication at Grand Prairie Services in Tinley Park, Illinois. Lisa has often attended MHCA meetings with Grand Prairie's former CEO Dennis Regnier.



Lisa Labiak

This is a great example of the importance of involving top management in the MHCA experience – Lisa was already convinced of membership value when she moved up in her career.

Serenity House serves DuPage County and the surrounding area. Created in 1985 as a four bed cottage serving those in recovery from substance use and dependence, it now serves approximately 800 individuals and their families on an annual basis. In 2012 it derived 51% of its revenue from Medicaid and 36% from program fees with the remainder coming from grants, donations and special events. Learn more about Serenity House at their website: www.serenityhouse.com. They are located at 891 South Rohlwing Road, Addison, IL 60101. Phone 630-620-6616. Labiak's email is: Lisa.Labiak@SerenityHouse.com.



**Have You Updated
Your Member Profile?**

MHCA's 2013-2014 Membership Directory will be printed soon. Be sure your Profile is current!

Leadership Changes

There are a number of CEO transitions going on right now! Because we are a group that highly values member involvement, it is especially important that those new to MHCA be quickly assimilated and connected to our work groups and informal networks. Get to know these talented folks!

In Spokane, Washington longtime CEO David Panken has retired from Frontier Behavioral Health. New CEO is Jeff Thomas, EdD, MSW

In San Rafael, California Steve Eckert, LCSW has been named CEO to replace Steve Ramsland who has joined the Open Minds executive team as Senior Associate.

At Emergence Health Network in El Paso, Texas, Kristen Daugherty, LISW, named Interim CEO to replace Gary Larcenaire, has been made official CEO.

With Dale Shreve's selection as CEO at MHCA, John Betts has been named Interim CEO at Harbor in Toledo, Ohio.

Shannon Ware has retired as CEO at Bluegrass Regional MHMR Board in Lexington, Kentucky. Serving as Interim CEO now is David E. Hanna.

Three more Interim CEOs are in place at (1) Indian Rivers Mental Health Center in Tuscaloosa, Alabama (Connie Robbins); (2) Peace River Center in Bartow, Florida (Bennie Allred) and (3) Coastal Behavioral Healthcare in Sarasota, Florida (Joanne Radcliffe). ❖

CALENDAR

MHCA 2013 Spring Conference

Dates: May 21 - 24, 2013
Location: Westin Savannah Savannah, Georgia
Phone: 800-228-3000
Rate: \$209.00
Deadline: April 25, 2013

MHCA 2013 Summer Conference

Dates: August 13 - 16, 2013
Location: Hyatt at Olive 8 Seattle, Washington
Reservations: Online only
Rate: \$229.00
Deadline: July 22, 2013

Mental Health Risk Retention Group

2013 Fall Board Meeting

Dates: August 22-23, 2013
Location: Stowe Mountain Lodge Stowe, Vermont
Phone: 1-888-4-786-9388
Rate: \$229.00 (14 day cancellation)
Deadline: July 19, 2013

MHCA 2013 Fall Conference

Dates: October 29 - November 1
Location: Westin Kierland Scottsdale, Arizona
Phone: 800-354-5892
Rate: \$209.00
Deadline: September 26, 2013

Data Rules!

Making convincing arguments for the importance of meaningful data, finalists in the 2013 Negley Awards for Excellence in Risk Management presented their exemplary programs to MHCA's Winter Conference on February 20. Judges of the competition were the Board members of Mental Health Risk Retention Group. Each finalist outlined their risk management efforts within the parameters of this year's Awards topic, "Data Driven Risk Management Practices." Taking top honors and a \$10,000 cash prize was The Institute for Family Health, New York City. Presenter was Jordana Rutigliano. Runners-up, each taking a \$5,000 cash prize, were Advocates, Inc. of Framingham, Massachusetts and Pretera Center for Mental Health of Huntington, West Virginia. Advocates' presenters were Dr. Christopher Gordon and Brenda Miele Soares. Speaking for Pretera were Karen Yost, CEO, and Craig Zappin. MHCA thanks these three organizations for sharing their excellent risk management advice. Information about their programs is available to MHCA members at the document archives section of our website: (<http://www.mhca.com/Members/DocArchives/2DocArchives.asp>). ❖

Is Strategic Planning Passé?

Reprinted with permission from *The Open Minds Circle*, March 7, 2013

In a recent discussion one of my favorite CEOs of a non-profit service provider organization made an interesting and somewhat off-base comment. He said that he still “did” strategic planning but that it had “fallen out of favor” among his non-profit CEO colleagues. When I asked why, he said they thought the market was just too volatile to successfully create strategy, and they were “responding to opportunities” instead.

The statement gave me a start. Is strategic planning passé? I view the business world as two phases – planning and execution. I view the strategic plan as the shared vision document for boards, managers, and staff – and the basis for making investments, making acquisitions, and setting a course. But, perhaps the market has shifted.

So, I did some research and sought out the arguments for bypassing strategic planning. The best, a 1994 *Harvard Business Review* article, **The Fall and Rise of Strategic Planning**, said: *...strategic planning has long since fallen from its pedestal. But even now, few people fully understand the reason: strategic planning is not strategic thinking. Indeed, strategic planning often spoils strategic thinking, causing managers to confuse real vision with the manipulation of numbers.*

I do agree with the authors that executives can't let the process of strategic planning (the meetings, the market research, the document) interfere with an adaptable strategy. And, the more turbulent the market, the more “adaptable” your strategies need to be (see Open Minds' article of 10/6/11, **Get Ready For The New Normal**). This was quite

aply stated by Dana O'Donovan and Noah Rimland Flower in their *Stanford Social Innovation Review* article, **The Strategic Plan is Dead. Long Live Strategy:**

...what is necessary today is a strategy that breaks free of static plans to be adaptive and directive, [one] that emphasizes learning and control, and that reclaims the value of strategic thinking for the world that now surrounds us. [Strategist Roger] Martin acknowledged this point at the Skoll World Forum in 2010 when he said: “Every model is wrong and every strategy is wrong. Strategy in a way helps you learn what is ‘righter’. People think you can prove a strategy in advance. You can’t.”

In the same way that a great strategy on paper is only as successful as its effective implementation, a great strategy is only as useful as its adaptability. As soon as strategic planning has become simply, “the plan”, it loses the necessary flexibility required to succeed in a complex, changing market.

I think a fluid market isn't an excuse not to plan (and I think executives who equate responding to opportunity for strategy can make some very costly mistakes). Rather, a fluid market is a reason to plan even more. Or, to quote Winston Churchill, “Plans are of little importance, but planning is essential...”

Sincerely,
Monica E. Oss
Chief Executive Officer,
OPEN MINDS

Note: Oss is facilitating MHCA's 2013-2015 Strategic Planning sessions beginning in May.

Spring Keynote Will Provide Lessons of Innovation

Jason Hwang, MD, MBA has been selected to keynote MHCA's 2013 Spring Conference on Wednesday morning, May 22. His topic will be “Innovation in Healthcare Service Delivery” He will present lessons of innovation from other industries and emphasize how business model innovation is essential in healthcare and especially behavioral healthcare.



Dr. Jason Hwang

Dr. Hwang is an internal medicine physician who, together with Professor Clayton M. Christensen of Harvard Business School and the late Jerome H. Grossman of Harvard Kennedy School of Government, co-authored *The Innovator's Prescription: A Disruptive Solution for Health Care* (McGraw-Hill, January 2009), the American College of Healthcare Executives 2010 Book of the Year and recipient of the 2011 Health Service Journal Circle Prize for Inspiring Innovation.

Dr. Hwang previously co-founded and was the Executive Director of Healthcare at Innosight Institute, a non-profit social innovation think tank. He also taught as chief resident and clinical instructor at the University of California, Irvine, where he received multiple recognitions for his clinical work. He has also served as a clinician with the Southern California Kaiser Permanente Medical Group and the Department of Veterans Affairs Medical Center in Long Beach, California. Dr. Hwang received his BS and MD from the University of Michigan and his MBA from Harvard Business School. ❖

Mental Healthcare America Elects Officers

The for-profit subsidiary corporation of MHCA, known as MHA (Mental Healthcare America) elected officers at its February 19 meeting in Clearwater Beach. Barbara Daire was elected Chairperson and Tod Citron, Secretary-Treasurer. Morris Roth, CEO of Aspen-Pointe in Colorado Springs, Colorado continues as Vice Chairman. Daire, who is CEO of Suncoast Center in St. Petersburg, Florida, replaces Dale Shreve as Chair with Dale's move to CEO of MHCA. Citron is CEO of Cobb & Douglas Counties Community Services Boards in Atlanta, Georgia. Officers serve three year terms. Recently elected as a new Director on the MHA Board is Peggy Chase, CEO of TERROS in Tucson, Arizona. Additional Directors are Nelson Burns, CEO of Coleman Professional Services in Kent, Ohio and Jon Cherry, CEO of LifeStream Behavioral Center in Leesburg, Florida. The vacancy created by Shreve's departure from the Board will be filled soon.



Barbara Daire

MHA oversees products and services of MHCA that extend beyond the MHCA membership and have potential to generate income which would be excluded from the scope of MHCA's status as a 501(c)(3) organization. Among those are the Mental Health Risk Retention Group (MHRRG), the Customer Satisfaction Management System and Peer Consultation. The MHA Board typically meets during MHCA quarterly conferences. Its next meeting will be May 21, 2013 in Savannah, Georgia at the Westin Savannah Harbor Hotel. ❖

Don Hevey Honored by MHRRG

At MHRRG's Board meeting on February 22 in Clearwater Beach, Florida, retiring leader Don Hevey was recognized by Negley Associates President Nicholas Bozzo. On behalf of the Board, Bozzo said, "Don Hevey is a true visionary and a man of action. Don's views that the insurance liability crisis was a major threat to the mental health industry and his membership, plus his inventive solution requiring him to bet all of MHCA's assets on The Mental Health Risk Retention Group, Inc. was a gutsy move. But then again few good things ever come easy, even if Don always made it look that way.

As we say goodbye to Don almost 26 years later, the insurance company he envisioned is continuing Don's mission by leading the charge and insuring the new challenges the industry faces including the risks associated



Don and Joy Hevey

by primary health care integration and overall mental health reform and funding. We wish Don nothing but the best. We thank him for his sage advice and service over the years, and are thankful and better off because of his dedication and most importantly his friendship."

Hevey has been MHCA CEO since 1985 and a MHRRG Board member since 2010. ❖



Mental Health Risk Retention Group, Inc.

www.MHRRG.com

Our mission is simple:
To provide you with the best insurance solution so that you have peace of mind and can focus on what you do best;
– the delivery of behavioral healthcare and social services to your clients.



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Conference Addresses Trauma Care, Metrics and Marketing

Clearwater Beach, Florida was the site for MHCA's 2013 Winter Conference and Annual Meeting where over 200 members and guests participated in stimulating focus groups and heard from top notch speakers. Highlighting the Conference were events honoring MHCA CEO Don Hevey on his retirement after 28 years at the helm of the organization.

Keynoter Sandra Bloom, MD engaged her audience Wednesday morning as she spoke of preventing violence and confronting trauma related health issues. One listener said, "I have heard and read about trauma informed care and this was one of the best. However, I have not heard trauma applied to organizational culture and structure and change and that was inspirational. This provides a lot to think about going back to work." Another added, "I have been sending folks to training on becoming trauma focused but admit I had little understanding of why this was important until today. This changed my perception of our service and our service delivery model."

Ryan Davis of Blue State Digital, presenter, and Larry Grinwis in the Marketing Focus Group.



Keynoter Sandra Bloom, MD and MHCA's new CEO, Dale Shreve

MHCA's Marketing and Fund Development Focus Group provided two excellent programs on Wednesday and Thursday afternoons, both well attended and highly praised. In addition, on both days in general session, nine member companies exhibited their marketing materials and had representatives available to describe the goal, audience and results of their marketing initiatives. In Wednesday's Focus Group five of the ten served on a panel to expand on their presentations. Panelists included Kristen Welter Hall

of CODAC, Kathy Myers of Coleman Professional Services, Summer Lott of Directions for Living, Jean Drees of Harbor, and Jeanne Oliver of the Jefferson Center.

In Thursday's general session Ryan Davis of Blue State Digital delivered a high energy presentation on the "Use of Social Media in the Promotion of Behavioral Healthcare." Later that day in the Focus Group Davis packed the room for a more detailed, in depth address on the same topic. His session earned top ratings for the conference,

and remarks included, “(This was) a look into the future which is one of the main reasons I love MHCA meetings!” and “I am going to get over my social media shyness and get on board!”

It was a pleasure to welcome back former MHCA member Denny Morrison who is now Chief Clinical Officer for Netsmart Technologies. Dr. Morrison addressed general session on Thursday morning with a presentation on “Metrics in the Clinical Process – Essential for Quality Care.” Before Morrison’s presentation, Netsmart’s Executive Vice President for Corporate Development, Kevin Scalia, presented a Lifetime Achievement Award to Don Hevey recognizing his impressive career and contributions to the field of behavioral health leadership.

MHCA is indebted to its generous sponsors whose contributions to the Winter Conference made possible the fitting tribute to Hevey on Wednesday afternoon and evening .

Sponsors were:

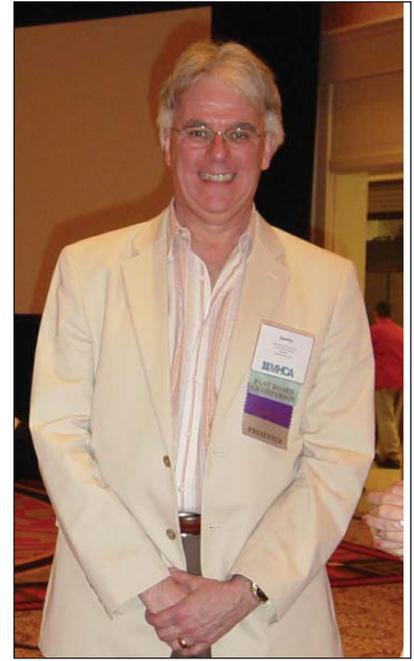
Champion Level (Captain’s Dinner):
Genoa Healthcare

Hero Level (Seaside Reception):
Mental Health Risk Retention Group and Negley Associates

Matey Level:
The Meyers Group

Friend Level:
Janssen Pharmaceuticals
Netsmart Technologies
QoL meds
The Joint Commission

Our exhibitors included Askesis Development Group, Cerner Anasazi, DATIS, Dominion Diagnostics, Essential Learning, Genoa Healthcare, iCentrix, MHRRG, Netsmart Technologies, NorthRock Pharmacy, QoL meds, Qualifacts and The Echo Group.❖



Denny Morrison, presenter, “Metrics in the Clinical Process.”

See Special Insert for coverage of events honoring Don Hevey at MHCA’s Winter Conference.

Best Practice Winners for Customer Satisfaction



Above: MHCA’s Customer Satisfaction Management System annually recognizes Best Practices in 16 categories. Pictured above after accepting their awards at MHCA’s 2013 Winter Conference are the following: Susan Buchwalter, The Counseling Center; Susan Rushing, Burke Center; Joe Masciandaro, Care Plus, NJ; Eileen Durkin, Counseling Centers of Chicago; Wayne Dreggors, Seminole Behavioral Healthcare; and Greg Speed, Cape Counseling. At far right are MHCA CEO Dale Shreve and MHCA’s Co-Chair for Performance Improvement, Linda De Piano.

Spring Conference, from p. 1

Board, chaired by Barbara Daire, which will meet at 4:30 pm. This for-profit subsidiary of MHCA oversees many products and services offered to members and the wider industry. Its meeting is open to all MHCA members.

Keynoting on Wednesday will be Jason Hwang, MD, MBA, internal medicine physician and author. His

topic is “Innovation in Healthcare Service Delivery” (*see article, page 4.*) Thursday’s general session will first feature a presentation on “The Accountable Care Act: What Employers Need to Know.” Making this presentation will be Thomas Dixon, Esq. with Eastman & Smith, LTD of Columbus, Ohio, and Nancy Pokorny, Managing Consultant with Findley Davies, consultants in human resources. Next up is Ron Zimmet,

Counsel to the Mental Health Risk Retention Group (MHRRG). Ron will present “Three Guidelines and a Checklist - Avoiding Employment Litigation.” Analysis of MHRRG claims reveals factual similarities from one claim to the next. Ron will share lessons learned from those claims about how to avoid employee lawsuits. This segment will be filmed in preparation for an educational video provided to MHRRG clients.

In addition to Strategic Planning and general sessions, our Information and Technology Committee, Performance Improvement Committee and Healthcare Reform Advisory Group will meet to advance their ongoing projects and discussions. On Wednesday afternoon an Innovation Roundtable will be led by Inman White, CEO of Community Healthcore in Texas. The Roundtable will serve as a forum for best practice exchange. It offers a unique opportunity for members to hear about one another’s programs and absorb each other’s entrepreneurial energies. Diana Knaebe, New Trends Chairman, will then facilitate a panel presentation on Behavioral Healthcare Integration given by members engaged in a variety of integration initiatives. On Thursday we invite all who have more to do in any given day than hours to do it to attend a learning session on “Organizing Your Digital Life.” Representatives of the IT consultation firm, Afia, will teach ways to become more streamlined in managing your email, contacts, appointments, and to-do lists. On Friday both the MHCA Board and MHRRG Board will meet. Again, MHCA members are invited to sit in on these Board meetings.

Savannah is a favored destination of MHCA. Come enjoy this southern city’s many charms and take home a wealth of ideas and solutions gained from your MHCA colleagues and invited guests.

Register online with MHCA and make your hotel reservations (800-228-3000) by April 25th. ❖



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