

THE HAVEN
Executive Director's Report
Submitted to the Board by Aimee Graves
January 24, 2023

"My story is about finding the freedom to make my own choices; I am never giving my life back to the control of little blue pills."

C.V. successfully graduated from the Haven Advanced Recovery Program this month. She has accomplished getting to stable housing, being rehired at her caregiver job, and reuniting with her family, including her minor children!

She reports "During my time at the Haven, I felt supported every step of the way. Lessons learned in residential from Miss Nati around balance and keeping connected to God will stay with me forever. In IOP I felt supported to be able to have more freedom, and to establish my own patterns and structure without having to rely on structure from outside professionals as much."

C.V. expressed that she felt supported and cared for every step of the way and expressed her desire to be a part of our Haven Alumni Program. She said she would be honored to come back as a volunteer to share her story.

Development & Communications

We ran a very successful end of the year campaign that raised \$36,500. We sent a holiday card to 500 donors and contacts and two eblasts to our mailing list that has a bit over thousand people on it. We were very excited to see the results and will continue to advertise the Arizona State Tax Credit program throughout the tax season.

We're participating in an Arizona Tax Credit Giving Guide that will be mailed to 10,000 households in the Tucson region. In addition, we're participating in the AZ Gives Day that takes place on April 4. We're sending our donors a post card reminder about the Tax Credit Program and will run an online campaign to promote the AZ Gives Day.

Our donor newsletter opening rates have remained high with 33.4% in November and 32.4% in December. (The industry standard 25.17% for nonprofits). We will continue sending the newsletter to our audience once a month.

We wrote three grant proposals in December. The O'Reilly Foundation awarded us \$7,500. We applied \$12,000 from the O'Reilly Foundation for playground upgrades at Residential, \$25,000 from the Barstool Sports Arizona Bowl for offsetting the cost of Native Ways outside providers and mentor position, and \$25,000 ARPA funds through the Arizona Foundation for Human Service Providers for staff retention and recruiting. We anticipate hearing from the last two funders later this winter.

December was another successful month on social media. Our Instagram page is starting to see more traction with higher reach and more profile visits. If you are on Instagram, please follow us @thehaventucson. Our most engaging Facebook posts included pictures from the holiday party, New Year's Eve, and our staff wrapping presents for clients' children.

December was a somewhat quiet month for events, but our outreach team will participate in more community events again in January. The list includes Indian Nations and Tribes Legislative Day in Phoenix, Tucson Indian Center's Winter Wellbriety event, Diverse Voices in Prevention round table, and a Resources Fair in Ajo.

Our own holiday party on December 13 was a great success! Thank you all for helping us get gifts for our clients. The clients received a handmade quilt made by a group of quilters at St Mark's United Methodist Church, handmade soap and loofa (thank you Phyllis!), lotion and other beauty care products, warm socks, notebook, and coloring pens. Special thanks to Kimberly and Patti for playing music, Colette and Phyllis for handing out presents, and Rebecca, Rebecca's husband Harlan, and Vanessa for serving food!

Our biggest fundraising event of the year, the Chrysalis Luncheon, is approaching fast. The event will take place on April 18 at Tohono Chul. We hope all Board Members will attend the event!

The next Development Committee meeting is scheduled on February 27, from Noon – 1 PM via Zoom.

Programs & Services

Outpatient/IOP-Housing

From a numbers perspective, December was rough. We were still down 3 IOP therapists. We seem to be "nearing" the end of that though, with the transition of Gabie Davenport, Residential Therapist to the Outpatient team. We have filled her to capacity caseload size of 14 IOP clients. We also extended an offer which was accepted for an additional IOP Therapist who will join us in March. We will continue to prioritize filling the third vacant IOP Therapist position, which will enable us to be at full housing capacity. If our staffing pattern holds, we anticipate that we will be at full capacity by the end of April.

Residential

- In December, the Outpatient team did an amazing job with engagement of clients. 82% attended their therapy appointments!

- Staff productivity continues to be measured and reported back to staff. We continue to reiterate the importance of providing and documenting all services rendered to clients.
- Reinstated the annual holiday dinner with the board, it went so well, the clients had a wonderful time
- Clients celebrated the holidays in a variety of different ways, including looking at holiday lights in the community, had a visit on Christmas morning from "Santa", and attending the Streams of the Desert New Year's Eve Dance
- Also had very delicious holiday meals, including homemade tamales
- The New Dawn Warrior Women grant continues to progress and bi-weekly curriculum meetings occurred to review and approve the curriculum
- The first group was held today, 1/24/2023 and went great!
- PRN RT Kersey transferred to the Medical Case Aid position
- Residential Therapist Gabie transferred to IOP, currently 1 open therapist position which should be filled by a previous intern
- Dennis Pepe received his acu-detox licensure and can now conduct acu-detox on his own
- Implemented the 30-Day Yoga Journey for all Haven staff and now are offering up the Upper Rec space for staff to do yoga as a group on Monday, Wednesday and Friday afternoons at 4:15pm.
- In the process of filling 6 open RT positions, 5 have had offers accepted
- RT staff have been empowered to facilitate more psycho-educational groups and have taken that opportunity.
- We have implemented weekly outings to church for clients who are interested, all voluntary.

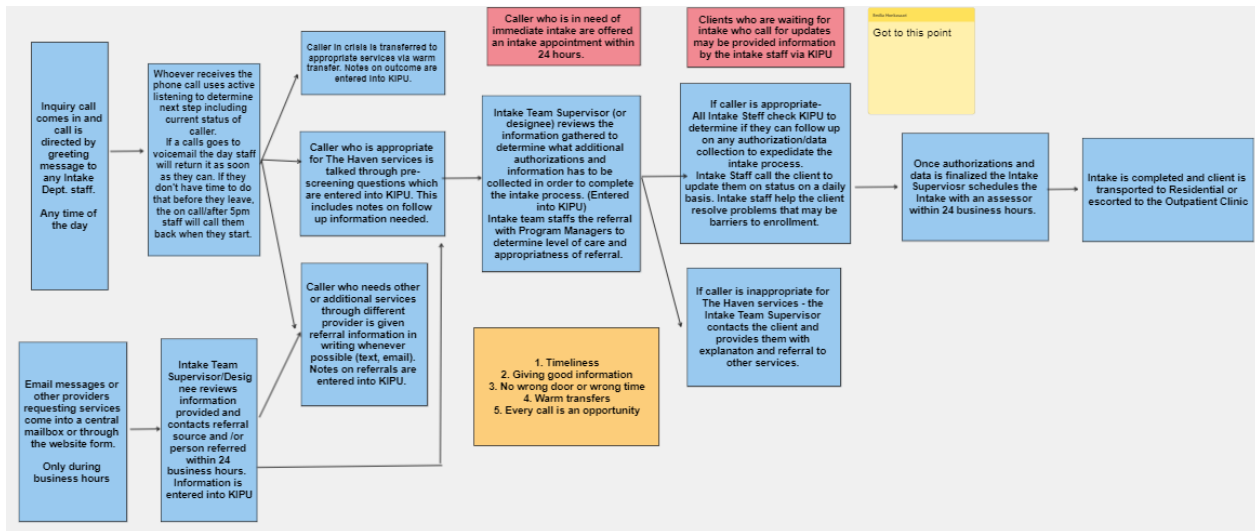
Assessment

As a result of our Customer Experience Workgroup's assessment deep dive findings and our overarching question that we're asking ourselves across The Haven, we have identified and prioritized projects, processes, and changes to physical environment that we believe will help us reach our goal. We also expanded the representation of employees involved in shifting our organizational culture to one that is client- and other stakeholders-focused.

We come together frequently to focus on this central question: *How do we create the best possible experience for our customers from entry point to first service?*

As a result, we are now implementing the following workflow. We have agreed upon tools that everyone uses universally to manage to our objectives so we will be able to

identify areas needing modification. We are in the process of identifying how we will measure our success in creating a great experience for our customers.



Training & Compliance and Quality Assurance

Cassandra Dawson, who had been with us since August in the Training & Compliance Coordinator position, resigned to take a position she really wanted at El Rio. This leaves The Haven without someone to focus on a long-neglected area, compliance. In an effort to cut expenses while our census has been down, we have put the position on temporary hold, but The Haven cannot afford to not find someone with experience and who will help the organization catch up from the past three years on compliance-related licensing and funder requirements, health and safety, and workforce development.

Kristin Lindberg, Director of Quality Improvement & Compliance, resigned this month. We are considering the configuration of this department since both positions are vacant. We will post this position as soon as possible.

Workforce

HR Initiatives

- Compensation Survey and Performance Management
 - Since the last Board Meeting, Fahrenheit Advisors has continued to work diligently with The Haven to develop a new Salary Structure and Performance Management plan. An overall compensation plan was developed and presented to the Governance Committee for review. If the compensation plan is approved, The Haven and Fahrenheit Advisors will begin the initial steps in implementing the plan in late January. During the implementation phase the executive leadership team and supervisors will be trained, and so, will be able to give their feedback on the process or continued need.

- Innovation HR was contracted to assist in the development of The Haven's Performance Management plan. Innovation HR is working directly with Latricia Clary and the executive leadership team to develop updated skills competency forms for each position based on federal, state, and CARF regulations and general knowledge requirements. InnovationHR specializes in Arizona public behavioral health providers' HR needs.

New HRIS System

- Since the last board meeting, switching to a new HRIS system was placed on hold in response to conserving expenses across The Haven. However, in preparation for the future, Latricia Clary met with a Paycom representative to review its comprehensive Paycom package. This information will be reviewed by leadership to determine if it is a viable option later this fiscal year, or next.

United Healthcare Audit

- United Healthcare conducted an HR audit of Residential BHPPs, BHTs, and BHPs on December 8, 2022. The Haven scored an 84% in HR. Due to this score, a Corrective Active Plan (CAP) was required and submitted to United Healthcare in January 2023. The Haven is still awaiting the final response from United Healthcare. It is important to note that most of the deficiencies noted by United Healthcare had already been identified by Latricia Clary. As a result, corrective actions had already been taken and were noted by United Healthcare. New procedures for employee onboarding (including background checks), vaccinations, new hire orientation, and employee training have already been implemented. Items such as monthly employee supervision and annual employee performance reviews are currently being developed and will be implemented as soon as possible.
- United Healthcare notified The Haven that it will be conducting an audit of the Peer and Recovery Support staff in late January 2023.

New Hires

- Emilia Honkasaari accepted the position of Communications and Development Director. Her official date of hire was 12/05/2022.
- Kersey Makepeace was promoted from PRN Residential Technician to Full-Time Medical Case Aide. Her official start date in the position was 12/12/2022.
- Amber Santa Cruz was promoted from Outpatient Therapist to Native Ways Program Manager. Her official start date in the position was 12/12/2022.
- Daniel Robb accepted the position of Assessment Representative. He began working as an Independent Contractor 12/14/2022. His conversion to full time employee is pending background clearance.
- Kayla Ruggiero accepted the position of Outpatient Peer Mentor. Her official start date was 01/04/2023.
- Gabie Davenport transferred from Residential Counselor to Intensive Outpatient Therapist. Her official start date in the position was 01/09/2023

- Vondi Grijalva was promoted to Assessment Team Supervisor. She officially started in the position on 01/17/2023.
- Sharese Bailey accepted the position of Interim Outpatient Program Manager. She began her interim position on 01/23/2023.
- Christine Evans, Outpatient Recovery Coach, was selected to become the third Assessment Team Representative (Full-Time). Her start date is 1/30/2023.
- Dijonea Castaneda has accepted the position of Residential Technician III. Date of hire is pending Background Clearance.
- Samantha Miller accepted the position of Outpatient Therapist. Her tentative start date is 03/13/2023, pending background clearance.

Active Hiring

- We are actively recruiting for the following positions:
 - 1 Director of Clinical Services (Full Time)
 - 1 Outpatient Program Manager (Full Time)
 - 1 Intensive Outpatient Therapists (Full Time)
 - 1 Residential Therapists (Full Time)
 - 2 Residential Technician (Full Time, 1- 6am-2pm, 1-2pm-10pm, 2-10pm-6am)

Finances, as of January 13th

The December financials are not complete. The following comments are on preliminary data.

For December 2022, Cash; Investment; and net Accounts Receivable balances are \$4.5m with 222 days cash on hand, a decrease of 29 from November. The Current Ratio, current assets over current liabilities, is 6.84 to 1. At December's close, 86% of Accounts Receivable is aged at 90 days or less.

The Net Operating deficit for December was (\$97,989), an unfavorable variance to budget of \$118,475 (478%). Revenue for December was less than budget by \$187,524 and Costs were less than budget by \$68,220. The shortfall in revenue is attributed to open therapist positions in Outpatient and low census (presumably related to Intake and Nursing staffing shortages) at Residential.

Year to date for the first quarter of fiscal 2023, the Operating deficit is (\$237,010) an unfavorable variance to budget of \$207,463 (802%)

Of note for December, the defensive interval fell to 19 days. This is out of compliance with AZCH's requirement of 30 days. The number of days cash on hand is at 7 months. The Haven's liquidity policy requires rebudgeting if we reach 6 months. On a good note, we have not yet had to dip into savings to fund operations.

The Finance Committee is scheduled on February 27, from 4 – 4:45 PM via Zoom.

Foundation

As per President Barbara, Aimee engaged Kendis Musheid of Ballard Spahr to revise The Haven Butterfly Foundation's Articles of Incorporation and Bylaws. Kendis has drafted both documents for The Haven Board's consideration. She will present and respond to questions from the entire Board at its February Governance Committee meeting.