

THE HAVEN
CEO's Report
Submitted to the Board by Aimee Graves
April 20, 2023

Finances, as of April 14th

For March 2023, Cash; Investment; and net Accounts Receivable balances are \$4.6m with 239 days (8 months) cash on hand, up one day from February. The Current Ratio, current assets over current liabilities, is 7.68 to 1. At March's close, 97% of Client Accounts Receivable is aged at 90 days or less.

The Net Operating surplus for March was \$66,611, a favorable variance to budget of \$65,212 – 1,625%. Revenue for March was more than budget by \$30,917 and Costs were less than budget by \$31,596.

Year to date for the first six months of fiscal 2023, the Operating deficit is (\$197,754) an unfavorable variance to budget of \$78,207 (165%).

The balance sheet continues to be strong but, as of the end of March, we did move \$100,000 from investment savings to fund operations. There were three payrolls in March, and we funded the non-participant 403(b) contribution. Accounts Payables and the credit card are current.

The Finance Committee is scheduled on May 22nd, from 4 – 4:45 PM via MS Teams. *Please note that if you use an iPhone, you may need to download the Microsoft Teams app in order to connect.*

Programs & Services

Nursing

Our new nurse Melissa Wilt is picking up quickly and we have scheduled 7-day a week nursing coverage. We are preparing to start policy reviews. We have scheduled with the health department to do an on-site Hep A and COVID vaccine clinic due to some positive cases in the community and our own population being at high risk. 20 Residential clients have been tested so far and 7 more have signed up for the next round.

Outpatient/IOP-Housing

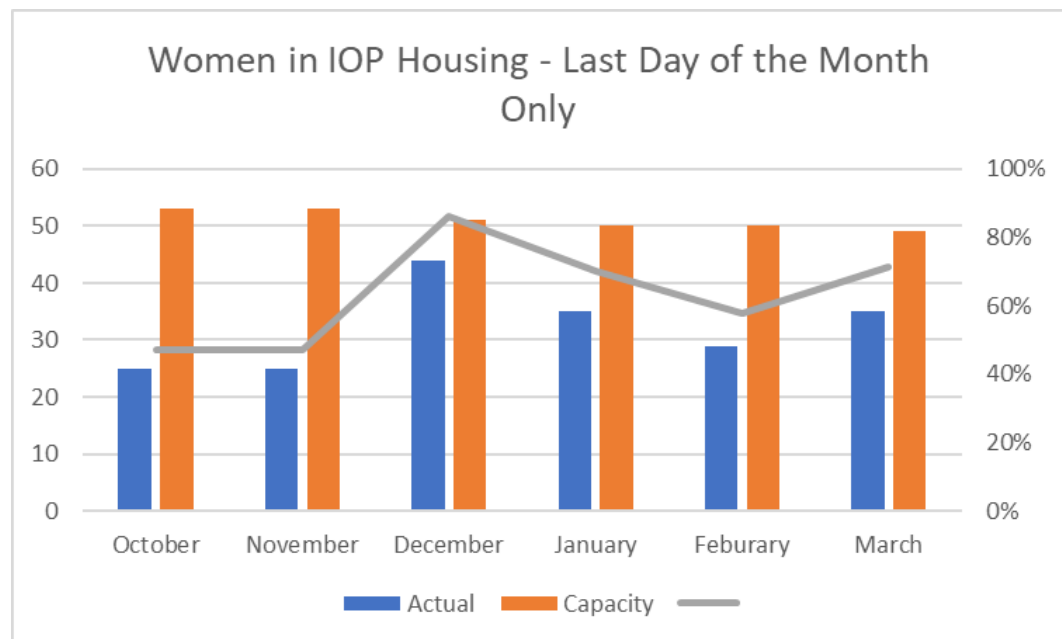
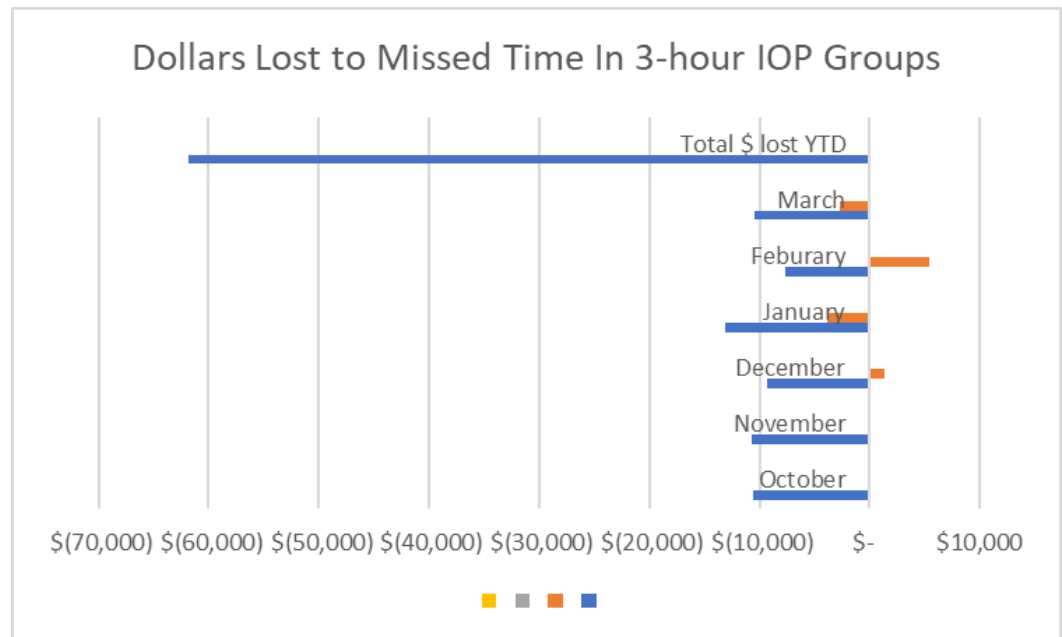
IOP Initiatives

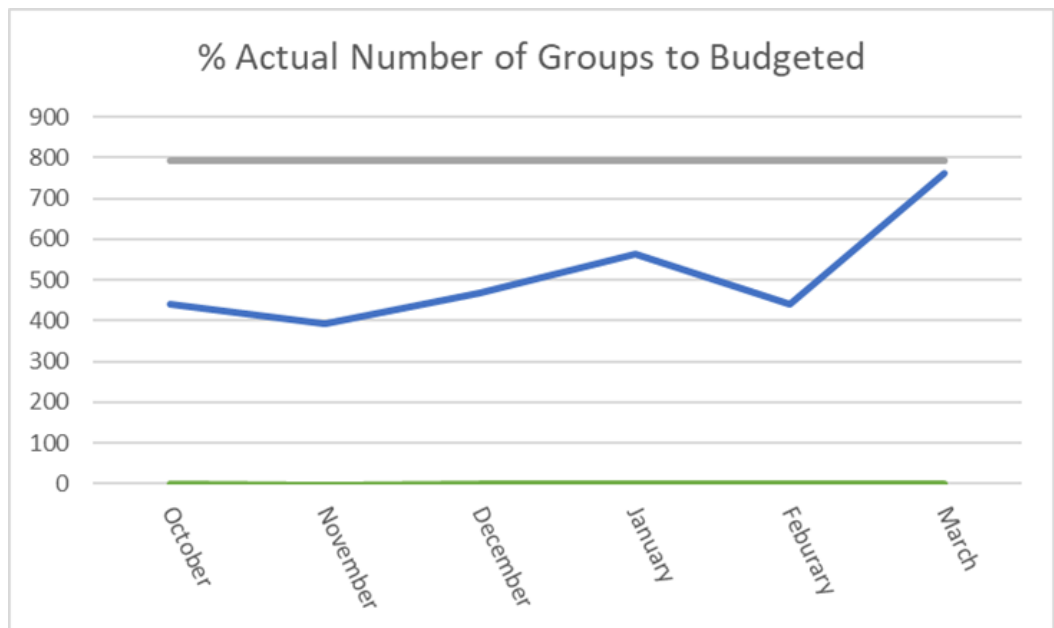
- Reviewing the service mix offered to clients to best support clients' and business needs.
- All of our Native Ways clients have been transitioned to Weigel as of 3/17/2023.

IOP & OP Performance

- Staff have increased their client engagement time (productivity)
 - For therapists: March 23.1 hours up from 18.83 hours in February, indicating therapists providing an increase in services to clients and documentation of services.
 - For recovery coaches: March 21.7 hours up from 16.2 hours in February, which indicates an increase in client support and documentation of services.
 - With the addition of our new staff: therapist (Samantha Miller) and recovery coach (Leilani), we have experienced a positive increase in our availability to provide services to clients.
- Census & Client Engagement in Services
 - OP Census is at 39 clients (capacity of 45-50, depending on caseload mix)
 - There are 4 groups that OP clients can attend (if recommended by their therapist): Women in Recovery, Grief & Loss, Gentle Yoga with Acudetox, and Fireside Meeting.
 - IOP Census continues hold steady in growth. As of 4/14 our current census is at 54 of IOP with Recovery Housing (Max Total Capacity = 57)
 - Women are prioritized for beds. If they have children 5 years and under and we do not have space for the children at the time, we advise the clients accordingly. We then implement a waitlist for these specifics clients.
 - Pending intakes from 4/17/2023 to 4/30/2023 include: 4 step-down care from residential for IOP with Recovery Housing scheduled between; 3 IOP-Externals (admitting from the community), and 2 OP clients (admitting from the community).
 - Continued efficiency from recovery coaches in transporting clients to IOP safely and timely which is contributing to our positive client outcomes and increased IOP programming adherence.
 - There has been a steady ebb and flow of clients in the Haven IOP Housing, the discharges include clients successfully completing the IOP program, declining further services, or needing a higher level of care.
 - We have seen an increase in rate of IOP clients attending the entire 3-hour groups.
 - Treatment teams have increased communication amongst themselves in supporting clients who missed 6 minutes or more and documented these encounters.
 - Since October 2022, client participation in IOP services has dropped off, resulting in a YTD loss of \$61,829. Client outcomes will likely also show a dip in treatment efficacy. We are focused on re-engaging clients in IOP recovery services, which we know from historical performance will improve both client outcomes and the bottom line. We continue to strengthen IOP program structure that supports

clients in engaging as fully as possible with their own treatment goals such as enforcement of group rules and uncovering barriers impacting programming negatively.





- Positive Client Outcomes
 - For March: IOP had a total of 8 IOP clients who successfully completed. A successful IOP completion is defined as a client who has completed 90 days of treatment who engaged positively in both individual and group sessions.
 - From April 1-13: IOP has a total of 2 IOP completions to date.
- There are a total of 11 Native Ways clients in housing and 1 client without housing.

Native Ways

Clients moved into Butterfly House!

3/13

Native Ways clients in IOP moved into the house formerly known as Weigle. Thanks to Tom and Nick and the numerous man hours they dedicated, the house was revitalized and ready for clients. This was one huge step on the way to ensuring the continued expansion of the Native Ways Program! The **Butterfly House** holds 12 beds, double that of the previous Unit E that held 6.





Planning
for Open
House

3/28

Networking & Partnerships

3/21

Amber, Nati and Sandra met with representatives from NMC to create a better relationship and referral process for NW clients both to and from. This collaboration will produce better partnerships within the community and help solidify our expanding program.



Nati, Cynthia, Vondi, Sandra,
Miguel,
Sharon and Briana



Ribbon Skirt Blessing

3/29

Debbie Royals came to Residential to provide a blessing for the ribbon skirts made with Native Ways clients. The women learned traditional teachings, the sacredness of wearing these skirts, how to take care of them and wear them with honor.



The Rev. Canon Debbie Royals is Pascua Yaqui from Tucson, AZ.

She is an Episcopal priest, author, retreat leader and educator and has served as the Canon for Native American Ministry in the Diocese of Arizona since 2015.

We hope to have Debbie continue to be a part of our growing program!

Distinguished Speakers Series Opening Blessing and Ceremony

3/29

The Opening Blessing and Ceremony for the Distinguished Speakers Series was launched at Residential. Patricia Flores: Yoeme/Yaqui facilitated the Aztec Copal Ceremony, a Sacred Smoke Blessing and Smudging of the people. After the ceremony Native Ways staff served cake for eager participants.



Drumming in the community for NANAINA

3/31

Residential clients drummed for the National Alaska Native American Indian Nurses Association (NANAINA). Some of the women reported being nervous but were happy and honored to wear their new ribbon skirts and drum for the participants that came from all over the Nation.



Residential

- Our ASU Intern Sandra Preston is completing her internship on 4/20
- Melissa Wilt is our new full-time nurse, working Wednesday thru Saturday, nursing is fully staffed again!
- We had the return of the Native Ways Distinguished Speaker Series on 3/29 and it was a beautiful blessing and ceremony.
- Of their own volition and at a faith community of their choosing, multiple clients were baptized on Easter.
- Easter was very fun filled for the clients. They had over 500 hidden Easter eggs to find around the property!
- We are having our spring picnic in the park with clients and residential staff on 4/26. Board members are welcome.
- We are working to identify trends and mitigate a spike in AWOL and ASA since 3/1/2023.

AWOL: 3

- All 3 involved with Federal Pretrial
- 0 were DCS involved.
- One left AWOL on 3/22 within 24 hours of admission from an urgent care appointment and never calling to be picked up from the appointment.
- One left AWOL on 3/31 after 31 days in treatment from her Federal Pretrial Court hearing and never calling for a ride to be picked up.
- One left AWOL on 4/9 after 2 days of being in treatment, left out that gate when she knew staff was not looking that way, peer told staff immediately and client was already off Adelaide
- None of these clients returned to treatment after AWOL.
- In 2 of the instances peers (other clients) were aware that the client wanted to leave but staff was not aware
- Implemented a requirement that staff (Recovery Coaches mainly) stay with clients at all court hearings

ASA: 18

- Only 3 had legal involvement, standard probation.
- 4 left within 24 hours
- 4 left within 48 hours
- 6 left within the first 7 days.
- 4 left within the first 30 days
- 6 self-identified or were observed experiencing psych instability resulting in the ASA.
- 1 left due to insurance confusion regarding coverage and declined to stay once that was clarified.

- This has resulted in better confirmation of insurance coverage prior to admission, and we learned we are able to accept 1 single Medicaid plan through Banner, a very unique case.
- 6 left due to focusing on external family/kid/significant other concerns.
- 5 left due to reported desire to use or actively presented under the influence at time of discharge.
- 7 met with their treatment team (RC or therapist) prior to leaving ASA for de-escalation attempt and still left.
- 4 left during business hours but declined to meet with their treatment team.
- 7 left after hours or on the weekend, RTs attempted de-escalation.

Assessment

Kudos to The Assessment Team for completing 59 intakes and 83 prescreens in the month of March 2023!

New Waiting Area

We haven't had any clients abscond or leave without giving notice since we have created the new waiting area! We provide a safe and welcoming environment for clients at time of intake and designated a quiet and calming space for clients to enjoy plenty of snacks, coffee/tea in a space free from disturbance. We have received many compliments from both clients who are presenting for admission and stepping down to IOP. Everyone seems to feel warm and welcomed. We also have been complimented about how helpful and encouraging our Assessment Staff has been during intakes.

We have had an increase in Native American women seeking treatment despite struggles they may experience, primarily with American Indian AHCCCS (AIPH). AIPH is the only insurance provider that requires a referral from a Behavioral Health agency. A prior authorization is based off the referral provided to AHCCCS. We encourage our women to enroll with a Behavioral Health agency, however, many times these women are struggling to find shelter, food, detox, or are incarcerated. We often encounter a Behavioral Health agency which has never completed a referral for residential substance use treatment. We then educate the agency with AIPH referral requirements and the prior authorization process. At times, this process may take days, weeks, or months until the client is scheduled an intake. Most recently our team spent two months calling out to a specific behavioral health agency, requesting information, and requesting meetings with the supervisor, all while encouraging and providing resources to the client. Great news...client was finally scheduled for intake! We are reaching out to agencies in rural areas, providing information about The Haven and closing the communication gaps while encouraging clients by helping them to navigate during these challenging times.

The reality is that if a woman who has ALPH, primarily Native American, cannot provide a referral from a Behavioral Health agency, she will not have access to substance use treatment. Although we often experience barriers to assisting these women, our team is consistent with exhausting all options and providing information needed for women to have the opportunity to enter treatment, experience recovery, and become successful in their journey.

Overall, with the cohesiveness of staff, we work together on efforts and success for *all* women!

Continuous Goal: To develop a plan to improve intake process and turnaround time, from the time perspective client calls to the time we respond to client or referring agency.

Residential

49 scheduled intake appointments- 21 no show/cancelled/rescheduled/detained.
28 Completed Residential intakes.

IOP

43 scheduled intake appointments- 12 no show/cancelled/rescheduled/detained.
31 Completed IOP intakes.

Total

92 scheduled intake appointments
59 intakes completed.

March 2023

Continuous Goal: To meet census requirements for Residential and IOP/OP programs.

83 Prescreens completed by Outreach/Assessment Team, not including referrals from outside agencies.

Residential

Bed Capacity: 52 Bed Availability: 7

IOP

Bed Capacity*: 57 Bed Availability: 0 Native Ways Beds available

**IOP is bedspace at capacity! Our census of Native American women is increasing.

Workforce

Performance Management

- InnovationHR met with Key Leadership on March 10, 2023 to continue creation of The Havens' Performance Management Program. Together, InnovationHR

and the Key Leadership Team identified the Non-Supervisory Performance Evaluation and Residential Technician Skills competencies. Going forward, the skills competencies will be developed by those responsible for overseeing each specific position. In the coming weeks the focus will be on the Peer Mentor, Recovery Coach, and Therapist positions. This project will continue over the next several months and is on target for initial implementation prior to the end of FY 2023.

- Fahrenheit Advisors and The Haven are finalizing timeline and schedule for training the management staff and employees on the new Performance Management Program. The goal of training is to help managers and employees understand the purpose of the new performance management tools, how they will be used, and how they impact the organization.

Policy and Procedural Updates

- Fennemore Craig, P.C. and The Haven continue to revitalize The Haven's Employee Handbook and Human Resource policies and procedures. This project is intended to ensure The Haven's HR policies and procedures meet all state and federal regulations, are fair and equitable, and are consistent throughout all platforms. This project will continue over the next several weeks. Once complete, the Employee Handbook and any updated policies will be presented to the Policy Committee. They will then be distributed to all employees for review and acknowledgement.

Workforce Development Plan

- On February 28, 2023, we submitted The Haven's 2023 Workforce Development Plan AZAHP. This plan outlined the Haven's Workforce Development goals for the year and how the organization plans to meet these goals. We are awaiting final approval from AZAHP.

Employee Wellness Program

- On February 9, 2023 The Haven held a Gender Awareness, Sensitivity, and Respect Training presented by Rachel Wedig, PhD in Gender and Women's Studies. This marked the first Training Series of the Employee Wellness Program. In April, members of The Haven will participate in the annual Dine Out For Safety event hosted by Southern Arizona Center Against Sexual Assault (SACASA) as part of the Employee Wellness Program.

New Hires

- Andrea Clemons was promoted to Residential Peer Mentor. Her official start date in the position is pending her replacement.
- Ann Thomas was promoted to Residential I. Her start date in the position will be 03/26/2023

- Kelli Gacic, LCSW accepted the position of Director of Clinical Services. Her start date will be mid June 2023.
- Sharese Bailey, LPC officially as the new Outpatient Program Manager on 02/26/2023.
- Samantha Miller, LMSW started as an IOP Therapist on 03/13/2023
- Leilani Sutton started as an IOP Recovery Coach on 03/13/2023
- Melissa Wilt accepted the position of Registered Nurse. Her start date is pending pre-hire clearance.
- Sonia Escamilla accepted the position of Kitchen Assistant. Her start date is pending pre-hire clearance.
- Joscelyn Patrick accepted the position of Residential Technician III. Her start date is pending pre-hire clearance.

Active Hiring

We are actively recruiting for the following positions:

- 1 Quality and Compliance Director (Full-Time)
- 1 Residential Technician (Full Time 6am-2pm)
- 1 Outreach Coordinator (Full-Time)
- 1 Human Resources Assistant (pending JD development)
- 2 Peer Mentors (Weekend overnight shift Thursday-Sunday from 3pm-1am)
- 1 Recovery Coach (Full-Time)

Foundation

At the April 3rd Governance Committee, President Barbara requested that Aimee follow up with Kendis Muscheid of Ballard Spahr with some clarifying questions. Aimee presented the Governance Committee's question to Kendis on April 5th and is waiting for written response from Kendis once she returns from Europe.

Once Haven Board members have completed their deliberations on what they want included in The Haven's and The Haven Butterfly Foundation's revised Bylaws and Articles of Incorporation, Kendis will forward drafts of these documents for their consideration, edits, and/or adoption.

Development & Communications

Thank you all for making the Chrysalis luncheon a success! We exceeded our fundraising goal and more importantly, created a memorable and meaningful event that all the guests enjoyed.

We had 180 guests which was a bit under our original goal of 200, but we felt like the turnout was still good and the venue felt full. We were happy that 14 of our current clients were able to attend the event and see how much support they have in the community.

We're still processing the donations made at the event, but please find a tentative breakdown of our revenue and expenses below.

Sponsors	\$20,000
Ticket sales	\$12,075
Donations	\$11,060
Raffle tickets	\$2,340
Flowers	\$190
<i>Total</i>	<i>\$45,665</i>
Venue rental and food	\$13,310
Invitations, awards etc.	\$1,558
<i>Total</i>	<i>\$14,868</i>

Net profit \$30,797

Our Arizona State Tax Credit advertising program was a success as well. We raised \$11,695 through the tax season and received several first-time donations. This tells us that our advertisement in a tax credit giving guide that was mailed to 10,000 households made an impact and we'll consider participating in the guide next year as well. We'll also make it more clear on our website and other communications materials that The Haven is a Qualified Charitable Organization for the Arizona Tax Credit.

Our most popular social media posts were the Chrysalis luncheon invitation as well as pictures from the official blessing and ceremony for relaunching the Native Ways Distinguished Speaker series.

As mentioned in the March report, one of our Outreach Coordinators is doing more direct outreach in the community. She goes to *Sister José Women's Center* and *Casa Paloma Women's Hospitality Center* on a weekly-basis and also participates the City of Tucson's homeless outreach team's efforts. She has done several prescreens on the field and few of the women have been accepted to our programs.

The next Development Committee meeting is scheduled on May 22nd, from Noon – 1 PM via Microsoft Teams. Please note that if you use an iPhone, you may need to download the Microsoft Teams app in order to connect.