

THE HAVEN
CEO's Report
Submitted to the Board by Aimee Graves
August 24, 2023

I arrived at The Haven on June 2, 2023, after being in jail for about three months. I had my baby 11 days later on the 13th. I never could have imagined the amazing support I have received here. My baby spent 2 weeks in NICU and each day I did my programming and then went to see him. The staff here made sure I had a breast pump right away and provided storage for my milk. Everyone was incredibly supportive.

DCS then took my baby for two weeks. At that point I had court and my Recovery Coach attended with me. She testified on my behalf and the judge decided to give me placement and give my baby back to me even though DCS was not in support of that. The Haven made sure the safety plan was abided by. They gave me everything I needed for my baby including help with diapers, wipes, and formula when needed. They provided a crib, swing, and helped with clothes. They made sure Haven staff could stay with me any time I left property as per my safety plan.

I never thought that people I didn't know could give so much love, compassion, and really care about and support me in my recovery. I am so grateful to everyone here. They have walked with me every step of the way and had my back the whole time. They got me into a fantastic IOP program that my baby will live with me at. I feel safe talking with anyone here and would definitely reach out in the future if I ever need help again.

--Client J.L.

Finances, as of August 15th

For July 2023, Cash; Investment; and net Accounts Receivable balances are \$5.1m with 267 days (9 months) cash on hand, down 2 days from June. The Current Ratio, current assets over current liabilities, is 4.29 to 1. At July's close, 93% of Client Accounts Receivable is aged at 90 days or less. American Indian Health billing and payments have slowed due to new restrictions.

The Net Operating deficit for July was (\$68,313), an unfavorable variance to budget of \$64,364 (1,718%). Revenue for July was \$101,951 less than budget and Costs were less than budget by \$37,587. In July, The Haven's management decided that billing the Peer Day code for groups was not advisable and returned to billing the IOP Day code. The combination of this and losing one of the Outpatient therapists halfway through the month affected client billing. The Residential average daily census was only 33 in July. On the plus side The Haven received an unrestricted \$40,000 gift directed from the Ruth Alexander Endowment Fund of the Community Foundation for Southern Arizona.

Year to date for the ten months of fiscal 2023, the Operating deficit is (\$262,270) an unfavorable variance to budget of \$318,210 (469%)

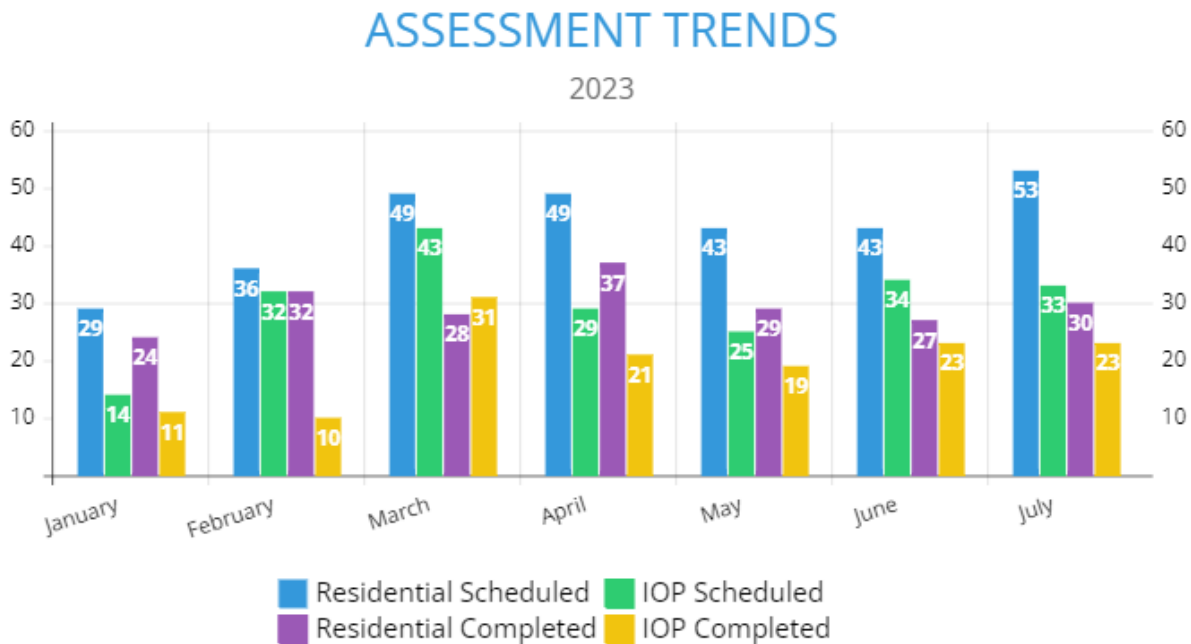
Accounts Payables and the credit cards are current. Units of service across all programs are less than budget and less than last year and budget.

The Finance Committee is scheduled on September 25th, from 4 – 4:45 PM via MS Teams.

Programs & Services

Assessment for the Months of June & July

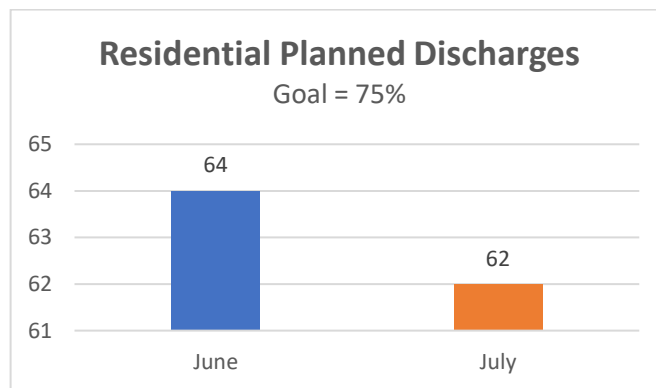
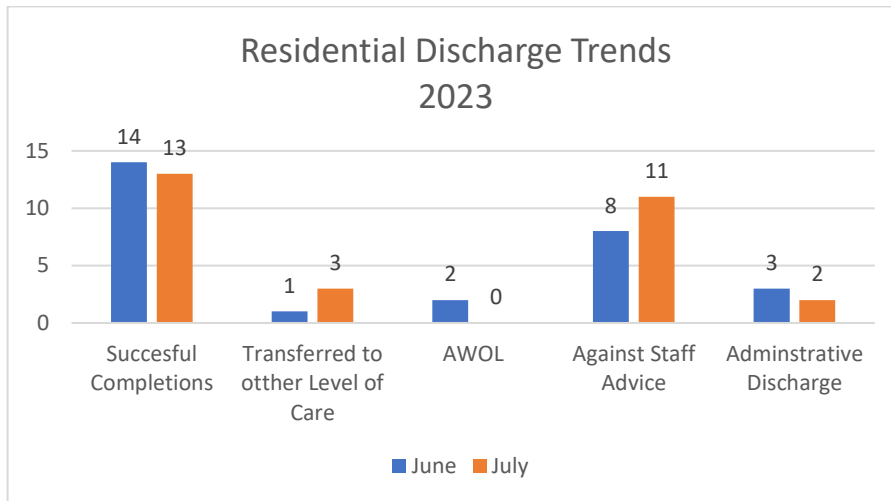
The total scheduled intake assessments for June and July were 163 with a total of 103 completed.



Irene Jiminez, BHPP joined the team in June as the Assessment Coordinator.

Interviews are being scheduled for new Assessment Representative to continue to increase the capacity for intakes across The Haven daily.

Residential



Staff intentionally intervene with the clients leaving ASA attempting to change their mind and encourage them to stay. The reasons leaving ranged from federal charges being dropped, already developing a discharge plan, and leaving prior to the completion of plan, not wanting to be in the residential level of care, and peer influence. Additional reasons included reporting the need to take care of things outside of treatment such as housing, childcare, and medical care and not feeling ready or needing Residential level of care.

In July, 2 clients who left ASA returned within 24 hours, one on the same day. The other client returned within the same day due to the outreach attempts made by Alumni Coordinator, Shawna Lortz. She will conduct outreach to encourage clients to return within 24 hours before the insurance company considers the client discharged and the intake process has to be restarted.

June Residential Events

- 6/9 and 6/12 we had a group of 9 ladies attend the Y Works Program with the YWCA which assists in resume building, interview techniques, and overall support in what an employment search will look like

- 6/16-6/23 Juneteenth Celebration! This included educational groups, staff wearing Juneteenth and Black Lives Matter supportive attire, and a week of Soul Food for lunch! It was a very inclusive, supportive, and tasty time!
- 6/22 Residential Staff had our monthly potluck with a Pride and Soul Food theme and Emilia posted some of it on Facebook.
- 6/23 Clients in our Native Ways program and Native Ways staff attended the Tribal Community Wellness and Awareness Conference in Maricopa
- 6/26-6/30 we celebrated Pride with a week of educational groups about the LGBTQ+ community and wearing supportive LGBTQ+ attire.
- Overall, we made some general group schedule updates to improve consistency in programming and allow for more Res Techs to facilitate groups.

July Residential Events

- 7/4-Clients had a small 4th of July celebration including a special meal.
- 7/11 and 7/14 we had a group of ladies attend the Y Works Program with the YWCA which assists in resume building, interview techniques, and overall support in what an employment search will look like
- 7/26-Jackie, one of our educators, took a group of clients to Aveda for free haircuts. This has been a regular occurrence for a while and makes the clients feel so special.
- 7/26-Native Ways Distinguished Speaker Series event.

Nursing

June was yet another busy month!

- We are continuing to work on nutrition curriculum for client groups.
- Nurse Manager, Savannah Robbins, RN was able to secure more cases of Narcan for FREE
- The first in the series of ongoing medication education was held at Residential on 6/22/23 with 22 staff present. Education on Vivitrol was provided by University of Arizona pharmacy intern Emily Tram. Staff were eager to engage in conversation and learn about the impact of this MAT. (See CEO BOD Report Attachment 1 Vivitrol handout)
- We have been able to get some of our mothers/pregnant women connected with other community resources. One mother in particular, a new mom who gave birth while in program whose baby was taken into DCS custody initially,

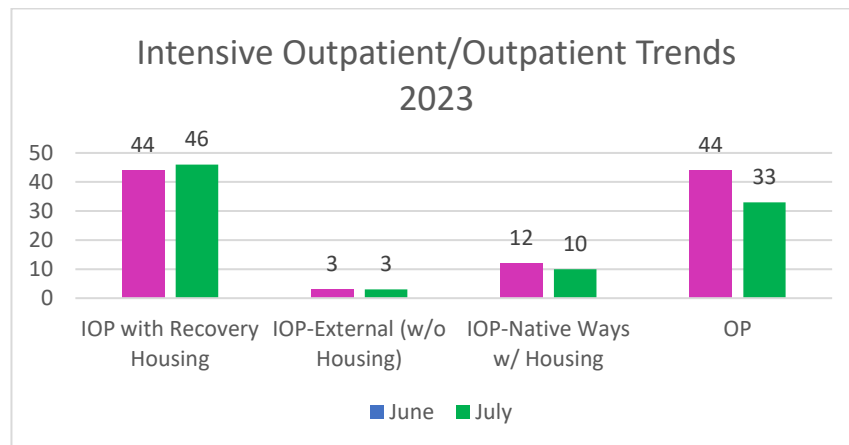
was able to establish services with a nurse who will visit her monthly even after she leaves us to continue providing her support. She was able to get her baby placed with her at Residential because of the available supports! She has expressed so much gratitude and I love seeing her be able to bond with her baby during such a critical time.

Intensive Outpatient (IOP) & Outpatient (OP)

- Our new groups, facilitated by the Recovery Coaches (Peers) are going well. Therapists attend these groups to offer therapeutic supports to the clients as well as group facilitation support to Recovery Coaches.
- We will be transitioning to therapists facilitating three process groups per week beginning the week of August 28.
- Currently the curriculum consists of the following groups that have been live since 6/20/23: Creative Expressions, Women in Recovery, Healthy Relationships, Self-care & Self-love, Anger Management, Seeking Safety, Self-Preservation, Recovering Together, Recovery Through Respect, WRAP, Transition Skills for Recovery, SMART Recovery, Recovery & Beyond (Life Skills group), Health & Wellness for Women, Mindfulness & Meditation, and Healing & Spirituality.

IOP Census Updates

IOP with Recovery Housing: Max Total Capacity = 57



Positive Program Client Outcomes

- Since 6/12/2023, 10 clients have successfully completed IOP, declined further services = 3, discharged due to lack of contact = 0, administratively discharged = 0, transferred to another provider to address mental health needs = 0, and referred to a higher level of care = 1.

- From 7/9/23 to 8/14/2023, IOP successful completions = 6, declined further services = 2, discharged due to lack of contact = 1, administratively discharged = 0, transferred to another provider to address mental health needs = 0, and transferred to another provider to continue IOP = 0.

IOP Program Adherence

- Treatment teams (therapist and recovery coaches) are working closely with our Peer Mentors in offering additional support to clients who are not adhering to attending the full 3 hours of group.
- Outpatient management team are exploring/reviewing options to enhance evening and weekend support to clients. We are working to identify the needs that best align with supporting clients with life skills groups that can help them reintegrate into the community after/during treatment including bus training, budgeting, cooking, cleaning, preparation and planning, employment, and independent housing.

New Staff/Staff Changes

In July, OP staffing was reduced by one therapist, however, on July 31, our new therapist, Brenda Venegas, LAC started in the Outpatient clinic. Currently we are working to build her client caseload so that she can provide therapeutic services for both individual and group for clients.

Staff have increased their client engagement time (productivity):

The leadership team is still reevaluating how success will be measured in light of the programmatic changes. We are working to find an equitable way to measure among the staff and the differing services they provide.

Native Ways Program

Please see CEO BOD Report Attachments 2 and 3 for Native Ways Program updates.

Workforce

Performance Management

- In July InnovationHR met with key leaders from Residential, IOP/OP, and Nursing to develop the remaining Skills Competency Forms for their departments. To date, Skills Competency Forms for all frontline positions have been completed. The Executive Management Team is completing the remaining Skills Competency Forms for members' positions. The Haven is on target to roll out the new Performance Management Program in September, prior to the end of FY 2023.

- On August 3, 2023, Jillian Zemp, from Fahrenheit Advisors, held a virtual meeting with all employees of The Haven to discuss the new Performance Management Program. Employees were introduced to the new Performance Evaluation and Skills Evaluation forms and given the opportunity to ask questions on the new process.
- Latricia Clary and Key Leaders are updating job descriptions. To date, 18 Job descriptions have been completely updated and approved for use. This project will continue until all positions have been reviewed and updated as necessary. The goal is to have all job descriptions reviewed by the end of the 2023 fiscal year.

Employee Benefits

- HR is in the beginning stages of Open Enrollment for the 2023-2024 Benefits year. Latricia Clary, Cynthia Duncan, and Aimee Graves met with new Insurance Broker, Crest Insurance Group, to discuss Employee Benefits. Benefits rates were adjusted as necessary.
- Open Enrollment will take place August 28, 2023-September 08, 2023. Open Enrollment meetings are scheduled for August 24, 25, and 29, 2023.
- Kyle Van Oort held an all-employee meeting to discuss The Haven's 403(b) plan on August 17, 2023.

New Hires & Transitions

- Irene Jimenez started as Assessment Team Coordinator on 07/03/2023.
- Diana Nunez started as Residential Technician on 06/26/2023.
- Michael Humphrey started as Residential Technician on 07/17/2023.
- Brianna Cooper started as Residential Technician on 07/17/2023.
- Brenda Venegas started as Therapist on 07/31/2023.
- Kaitlin Burkhart started as Kitchen Assistant on 07/03/2023.
- Christopher Francis accepted the position as Indigenous Communities Outreach Coordinator. Start date pending pre-hire clearance.
- Marcella (Marcy) Kumer accepted the position as Outreach Coordinator. Start date pending pre-hire clearance.
- Erisha Green accepted the position as Quality and Compliance Director. Start date pending pre-hire clearance.
- Nafi Cano transitioned to the Native Ways Educator in July

Active Hiring & Transitions

- 1 Therapist for Residential Our full-time therapist Misty has submitted her resignation and her last day will be 8/31, we are actively looking for another therapist to fill that position.
- 2 Residential Technicians (Full Time 2pm-10pm and 10pm-6am) There have been multiple RT staffing changes, we were fully staffed for a brief time, but are continuing to actively hire for 2 open full-time positions.
- 1 Assessment Representative (Full-Time)

Development & Communications

Fund Development report as of August 11, 2023

| Breakdown | Year to Date | Goal FY 23 | Progress |
|--------------------------------------|---------------------|-------------------|-----------------|
| # individual donors \$1,000 + | 8 | | |
| # individual donors \$1-999 | 161 | | |
| # individual in-kind donors | 76 | | |
| Raised from individual donors | \$61,804 | \$63,000 | 98.1% |
| Average gift | \$189 | | |
| # organizations/businesses | 42 | | |
| Raised from organizations/businesses | \$42,945 | \$42,000 | 102.3% |
| # Grants submitted | 17 | | |
| # grants received | 9 | | |
| Raised from grants | \$101,900 | \$15,000 | 679% |
| | | | |
| Campaigns | | | |
| End of year giving | \$29,257 | \$40,000 | 73% |
| Tax credit advertising | \$12,495 | \$5,000 | 250% |
| Chrysalis luncheon | \$31,512 | \$28,000 | 113% |
| Mother's Day | \$2,117 | \$5,000 | 42% |

During the summer, we've been focusing on thanking donors and making plans for the next fiscal year rather than running any fundraising campaigns. We've organized three "Thank-A-Thon" days to call donors and send them postcards. Thank you for everybody who has participated in the Thank-A-Thon! We've got a lot of positive feedback from our donors and as a result, are planning to host Thank-A-Thons also in the future.

We submitted a grant application to the Arizona Complete Health to execute major infrastructure projects and applied for a grant from the Arizona Diamondbacks Foundation to offset the cost of children staying at The Haven.

We have several pending grant applications but have received positive news from two funders. We received \$5,000 from the Sundt Foundation to offset the cost of children staying at The Haven and \$8,400 from the TMC Health Foundation to create a client assistance fund. Most importantly, we received a \$40,000 grant from the Ruth Alexander Endowment Fund held at the Community Foundation for Southern Arizona. We did not apply for this grant, so it came as a very pleasant surprise.

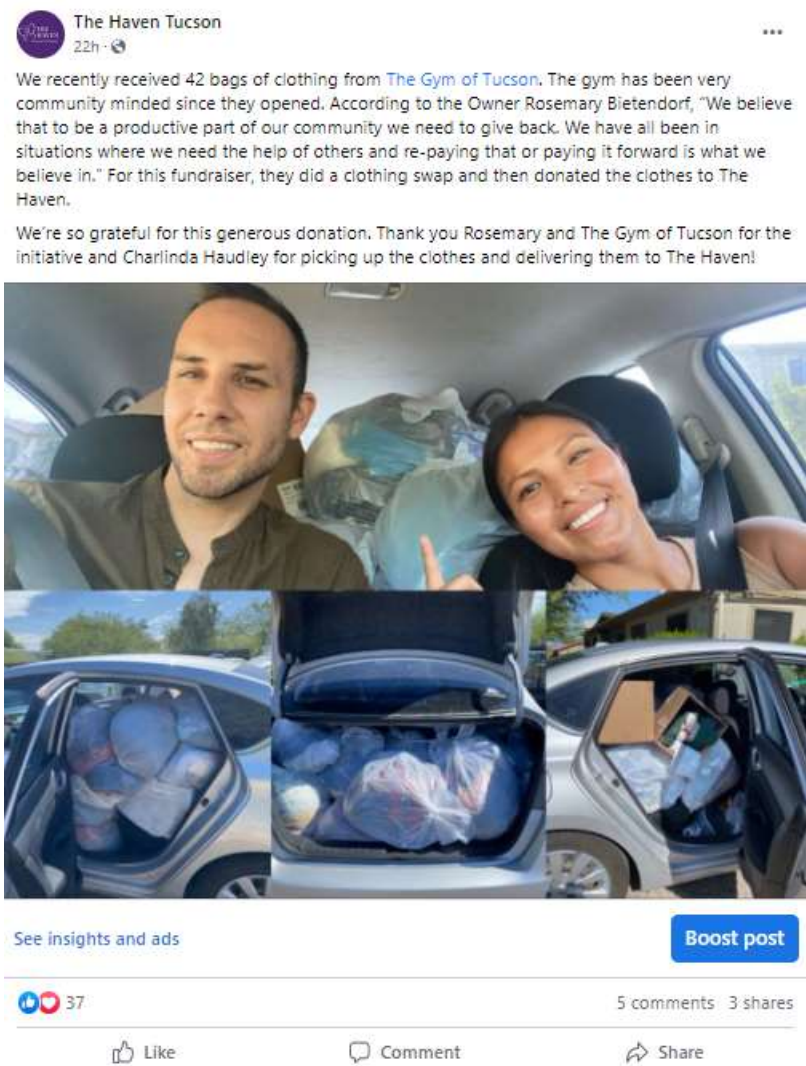
The Haven has organized a documentary film screening and panel discussion in honor of the National Recovery Month. The event takes place on Sunday, September 24 from 2:00pm to 5:00pm at the Loft Cinema. The documentary film Motel Drive follows the Shaw family for 7 years in Fresno, CA as they grapple with housing insecurity and addiction while trying to raise their young son. The movie's director Brendan Geraghty will join us for a panel discussion and Q&A after the screening. The other panelists are Tom Litwicki, Chief Executive Officer of Old Pueblo Community Services and Tonya Hamilton, Director/Tribal Liaison of the Governor's Office of Youth, Faith, and Family. The discussion will be moderated by Claudia Powell, Associate Director of the Southwest Institute for Research on Women (SIROW). The Governor's Office of Youth, Faith and Family will be the event's title sponsor, but we are still looking for other organizations to sponsor the event.

Lately, The Haven has received a lot of positive media attention. On July 26, University of Arizona News published a great article about our Native Ways Program and partnership with the University of Arizona Southwest Institute for Research on Women (SIROW). The story was picked up also by Arizona Public Media and KOLD News 13.

<https://news.arizona.edu/story/uarizona-will-help-local-substance-use-recovery-program-reach-more-native-american-women>

<https://news.azpm.org/p/azpmnews/2023/8/3/217005-the-haven-strives-to-become-go-to-resource-for-native-american-women-in-recovery>

Our most popular social media post was a shoutout to the Gym of Tucson and their generous in-kind donation to The Haven. The gym organized a clothing swap and then donated 42 bags of clothing to us. The gym's owner Rosemary Bietendorf said they chose The Haven because they have heard great things about us. According to her, "We believe that to be a productive part of our community we need to give back. We have all been in situations where we need the help of others and re-paying that or paying it forward is what we believe in."



Our donor newsletter was opened by 35.3% of recipients which is a slight increase from previous months.

We participated in several community events during the past month. We had an information table, and our clients and alumnae shared their stories at an Indigenous Overdose Awareness event. We sponsored and tabled at the *Southwestern School for Behavioral Health Studies Conference and the Rural Women's Health Conference*. At the latter event, our Native Ways Therapist Nati Cano was honored with Rural Women's Health Awards in the category of Innovative Approach to Rural Women's Health. We also participated in the Enlightening Hope Project's 3rd Annual Overdose Awareness Day community event.

The next Development Committee meeting is scheduled on September 25, from Noon – 1 PM via Microsoft Teams.

Foundation

As directed by President Barbara and The Haven Board at its 5/23/23 general meeting, on 6/7/23 Aimee sent to The Haven Butterfly Foundation's Board of Directors:

- A cover letter on behalf of The Haven Board of Directors
- The Haven Butterfly Foundation – Amended and Restated Articles of Incorporation (Haven as Member)
- The Haven Butterfly Foundation – Amended and Restated Bylaws (Haven as Member)
- A draft Service/Personnel Agreement

The Haven continues to record expenses for The Butterfly Foundation.