

Annual Report

2016-2017

Hope Healing Health



Letter from the CEO



Lifewell Behavioral Wellness, the result of a merger in 2011 of Triple R Behavioral Health and New Arizona Family, successfully completed our first five years of operation in 2016. In recognition of this monumental achievement we are dedicating this first Annual Report for Lifewell to the legacy of these two outstanding organizations.

Triple R and New Arizona Family were both formed in the 1970's and represented the best of what is known as community based services for individuals with behavioral health needs. The world of healthcare is vastly different than the environment these two organizations operated in originally. The boards and executives of both organizations showed great vision and courage in combining their strengths and expertise to create a new organization that could meet the challenges of our world today and maximize opportunities for growth.

I use the words "vision" and "courage" because there is no "crystal ball" when it comes to predicting the outcome of mergers, and it takes tremendous courage to have faith in the new organization when the heart is still with everything that each organization has separately accomplished and stood for in the past.

My experience has taught me that one of the toughest parts of mergers is that a whole new culture for the organization needs to be created and this can only come about through trial and error and time. There are many sacrifices and we take this opportunity to express our gratitude and thanks to everyone who has been a part of this journey.

The combined strength of our legacy organizations, Triple R and New Arizona Family, has provided us with the capacity to expand our outpatient, residential, and housing services. In addition, the merger enabled us to add three of the direct care clinics that provide the psychiatric and case management services for persons with serious mental illness.

The success and strength of Lifewell Behavioral Wellness has provided us with the ability to establish a solid foundation and embrace our future. We are developing strong strategic partnerships, preparing for CARF accreditation and participating in initiatives with Mercy Maricopa Integrated Care and others to develop integrated health services.

I believe the best is yet to come and we owe it all to the wisdom of our legacy agencies, Triple R Behavioral Health and New Arizona Family.

Best Regards,

Thomas K. McKelvey
Chief Executive Officer

How Lifewell Came to Be

With the merger of **Triple R Behavioral Health** and **New Arizona Family, Inc.** in July 2011, one of the first questions to address was what name the organization would take. While keeping in mind the importance of honoring and respecting the legacy organizations, there was a feeling that in order to create something greater than the sum of the parts, a new legacy, vision, and culture should be created to enable a fresh start and provide a growth opportunity for this new organization within the ever-changing world of healthcare.

Lifewell provides a full continuum of services for the adult population. We have continued and refined programs that existed prior to the merger and we have added new ones to meet the needs of our community. Most notably, in August 2015, we added three SMI Clinics that were formerly operated by Choices Network of Arizona.

Lifewell has approximately 500 employees and an annual revenue amount of about \$40 million. During our first five years, we have focused on meeting the needs of our community by providing quality programs through best clinical practices. We have also implemented a new electronic health record and have invested resources into developing a sophisticated information technology department to assist with tracking and reporting outcome data.

We have accomplished a lot in a short time, but we also recognize that we have a long way to go. With healthcare changing rapidly, we know that our biggest challenge is maintaining relevance for our members and funding sources.

We must be flexible, nimble, and innovative...

We are ready!



Legacy of a Merger





Legacy of a Merger

“...it was a matter of fate that these two organizations would cross paths.”



History of New Arizona Family, Inc.

New Arizona Family, Inc. was founded in the 1970's by a group of clients from Cottonwood, Arizona who were seeking substance abuse treatment. The organization went through various iterations of growth and leadership throughout the 1980's and 1990's. Interestingly enough, the original name was Arizona Family. The "New" came as a result of having to file as a new corporate entity in the 1980's. In 2001, Thomas McKelvey was selected as CEO for New Arizona Family, and he remained in that position until the time of merger, when he took on the role of CEO for Lifewell.

History of Triple R Behavioral Health

Triple R Behavioral Health was founded in the 1970's by former CEO, and current Lifewell Board Chair, Wayne Hochstrasser. Wayne was the sole employee at the time of its inception. Ironically, the first administration building for Triple R was located at 302 E. Southern Avenue in South Phoenix. This same facility would later be utilized by New Arizona Family to provide an SMI Residential Treatment Program... perhaps it was a matter of fate that these two organizations would cross paths.

456
Graduates



from Women's Pregnant & Parenting Residential Program



Average Number
of People
Housed Annually



222 Certified Specialists

from the Peer Training Program since FY2014



Clients with
SA Diagnosis



\$40
Million

Current Annual
Revenue

463

Total Employees



Number of Clients Served:

FY12: **4,701** FY13: **5,106** FY14: **5,526**
FY15: **8,269** FY16: **9,044**



Success Markers

“Leading and redefining behavioral healthcare in Arizona.”

- *Creation of a Chief Medical Officer (CMO) Position*
- *Innovative SMI Direct Care Clinics*
- *Full Continuum of Care for Adults*
- *7 Outpatient Clinics Throughout the Valley*
- *33 Locations Providing Residential Treatment and Community Living*
- *49 Housing Locations*

Chief Medical Officer Position:

Dr. Mona Amini
Chief Medical Officer



We were extremely fortunate to find the perfect candidate! Dr. Mona Amini joined our team and immediately began implementing changes that have had positive impacts on our clients and our organization.

Dr. Amini has lived most of her life in Arizona. She completed her psychiatry residency at the University of Arizona College of Medicine – Phoenix Psychiatry Residency Program located at Banner – University Medical Center Phoenix. She has held a vast array of clinical duties within the Valley, including acute inpatient psychiatric care, consultation/liaison in hospital and non-hospital settings, residential addiction treatment center consultation, telepsychiatry, outpatient therapy, outpatient community psychiatric care, and skilled nursing facility consultations. Dr. Amini has thus had experience in the 360-degree realm of behavioral health in Arizona. With experience in prior administrative roles, she seeks to utilize her knowledge in bringing evidence-based psychiatric care to both her staff and the behavioral health members. Her ultimate ambition is to help lead and redefine behavioral healthcare in Arizona.

As Chief Medical Officer, Dr. Amini provides the next step to the advancement of Lifewell's vision to fulfill the organization's mission and guiding principles in response to the needs of the community it serves. Her experience and representation of the medical aspect of behavioral health will represent the organization in its integration of behavioral health into the medical community.



In August of 2016, Lifewell added a full-time Chief Medical Officer position. With the increased client volume of the SMI Clinics, and as a result of our desire to incorporate the medical component of the care we provide into our overall vision and strategy of an integrated approach to healthcare, we felt the timing was right.

Outpatient Treatment & SMI Direct Care Clinics

Outpatient programs provide for the treatment of serious mental illness, substance abuse, and general mental health issues. We provide client-centered treatment and supportive service planning to promote sustained recovery and healthy, independent living.

Rehabilitation

Rehabilitation services assist members in developing skills and appropriate behaviors to achieve and sustain vocational and social independence.

Community Living

This program assists clients in the transition from intensive substance abuse and mental health treatment to sober and independent living.

Women's Residential Program

The Pinchot Gardens facility serves women who have co-occurring general mental health and substance abuse diagnoses. Clients receive treatment and services while on site with their children.

SMI Residential Programs

Our residential treatment facilities serve low-income adult clients who have co-occurring serious mental illness (SMI) and substance abuse diagnoses.

Lifewell Programs & Services



Outpatient Clinics



Lifewell Now

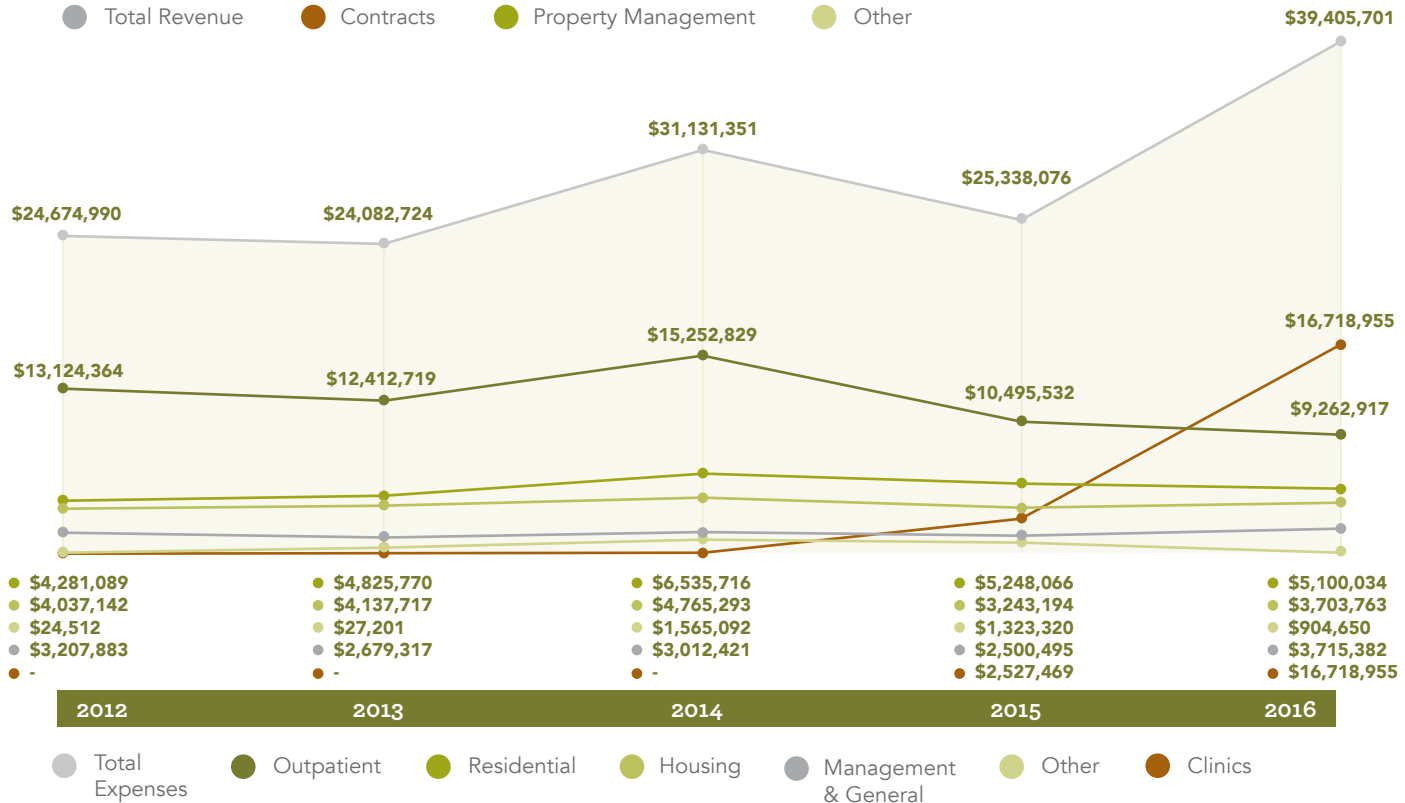
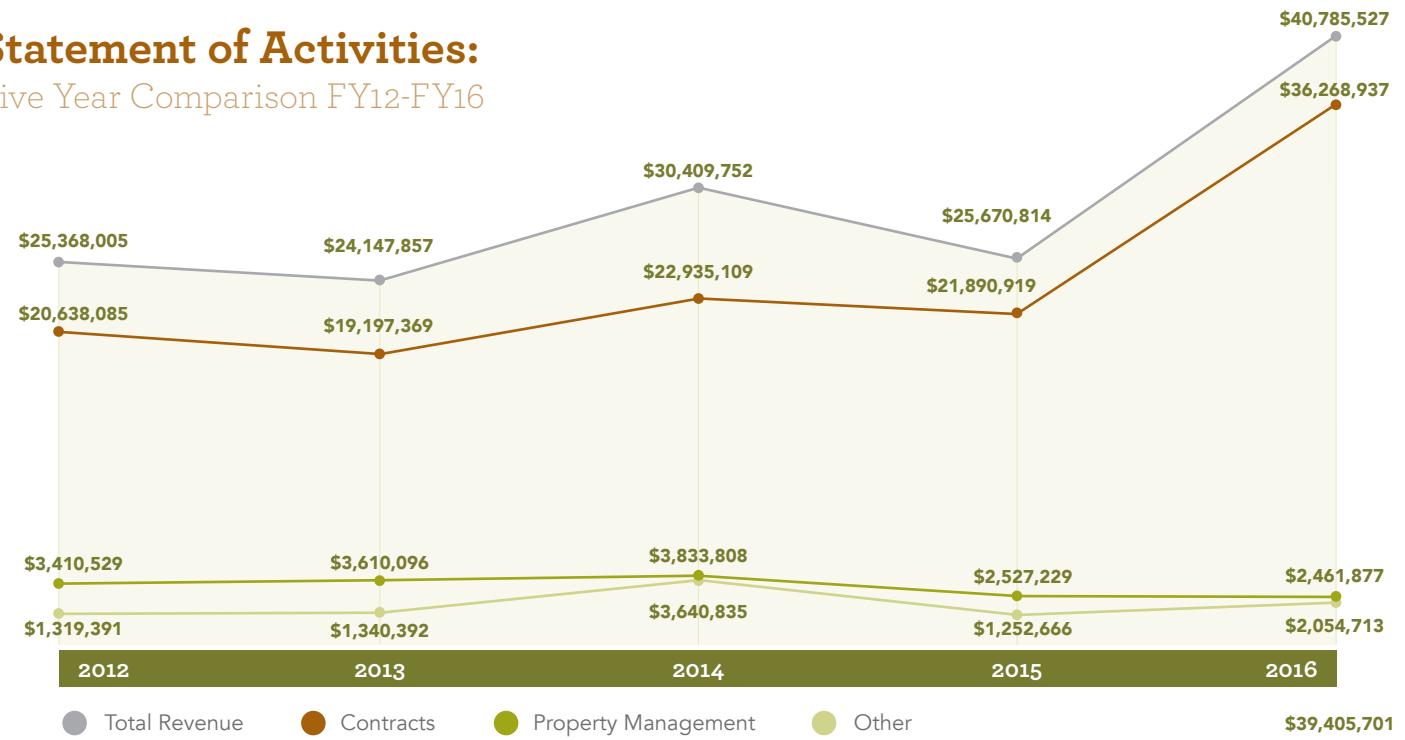


Change in Net Assets:

- 2012 - \$693,015
- 2013 - \$65,133
- 2014 - \$721,599
- 2015 - \$332,738
- 2016 - \$1,379,826

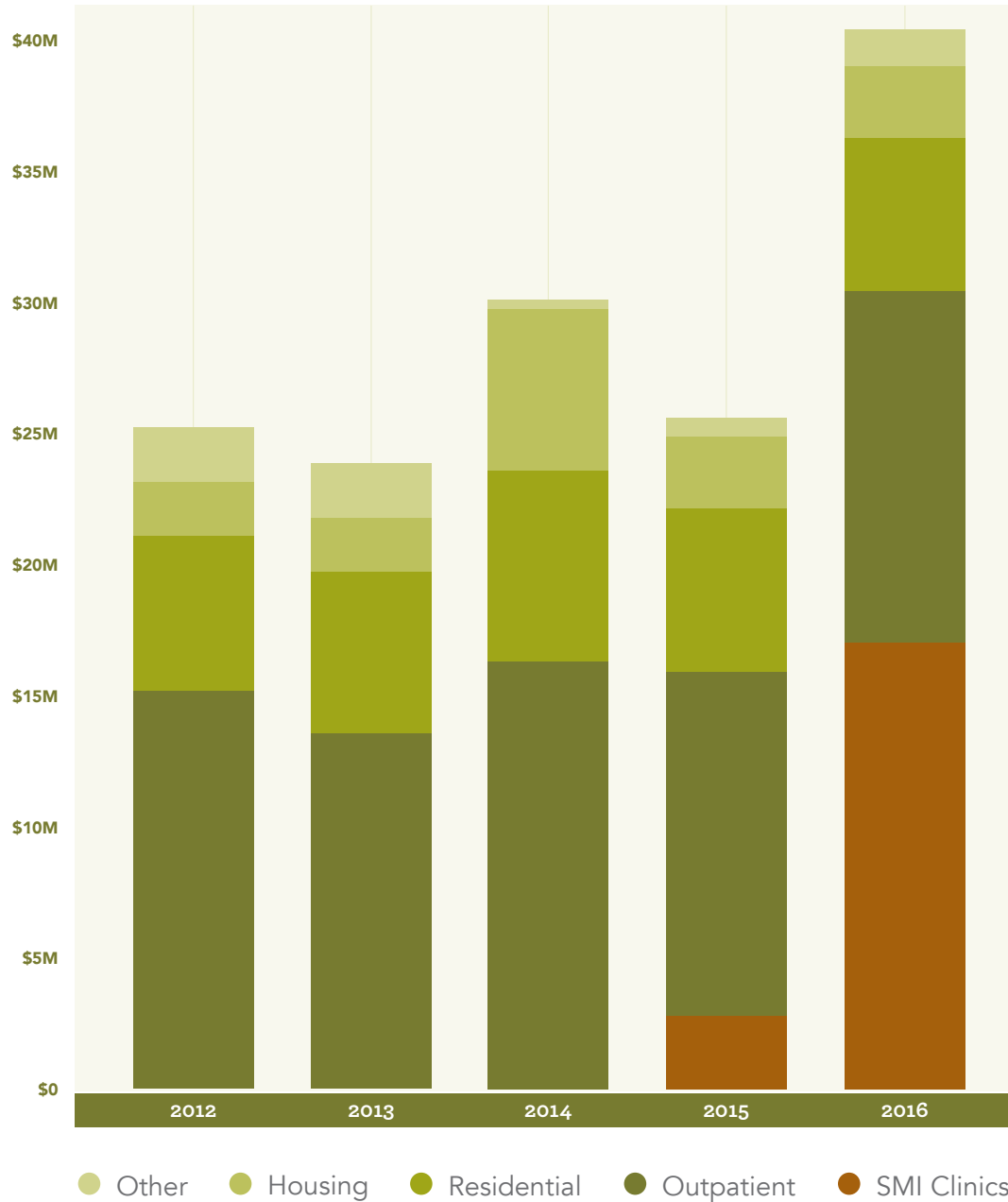
Statement of Activities:

Five Year Comparison FY12-FY16



Program Revenue Trend:

FY12-FY16



What the Numbers Have to Say



Change in Net Revenue:

- 2012 - \$25,368,005
- 2013 - \$24,147,857
- 2014 - \$30,409,752
- 2015 - \$25,670,814
- 2016 - \$40,785,527



What Our Clients Have to Say

“ Since I have been here I have learned a lot. I have overcome so much. I have accomplished a lot. When I came to Lifewell and the Supported Ed I had no idea how to control my anger or how to use my voice. Now I can express my feelings and use my voice in a positive way.

Kimberlee

It was a good experience for me and the things I've learned will help me in the long run as far as my long term recovery and to help others reach theirs.

Tanisha

Thank you Lifewell for all the services that you offer all your clients. You have been instrumental in my recovery. With these classes, my education has improved my quality of life. Your services are a valid asset with social community norms. I will share my world of knowledge with my peers and upcoming clients. Again, thank you, I will always take what I have learned with my life and help those that need or want a positive step in life.

Sandy

“Lifewell gives me a chance to improve myself.”

Florentina

“Lifewell program has taught me to be more open-minded and not so withdrawn as I used to be.”

Ysidro

“Lifewell has helped me progress in a lot of ways, including in self-esteem.”

Veronica

I am happy to be part of this team who treats our clients with compassion, dignity, and respect. Happy Anniversary Lifewell.

Roger Mayorga
Nurse Practitioner
Since January 7, 2008



It was great to see the two smaller companies of TRBH and NAFI form Lifewell Behavioral Wellness as it allowed these two smaller niche companies to become one larger company and be able to expand on the services provided.

Melody Baca
Human Resource Director
Since February 22, 2005



When I started my career, back in 1988, I had no idea how fulfilling it would be, both professionally and personally.

Phillip Havatone
Director of Environmental Services
Since July 5, 1988



I am proud of the high quality services we deliver to our members on a daily basis and the positive effect we have on our members in their recovery process.

Sue Giles
Program Coordinator I
Rehab Services
Since February 28, 2003



What Our Staff Have to Say



“Each year, we seem to grow a little more and we keep moving forward.”

Chad Close
Program Manager
Since January 23, 2001



“The changes and growth within the agency have been immense, and I personally have learned so much”

Patricia Gurrieri
Program Coordinator
Since January 22, 2001



Embracing the Future

We are pursuing several strategic partnerships and initiatives to position Lifewell for strong performance in the key areas surrounding healthcare, including the following:

- Participation with Mercy Maricopa Integrated Care to implement the Teamlet Model for improving coordination with primary care.
- Participation in the Practice Innovation Institute which provides assistance to providers in transforming clinical practice that results in better outcomes for consumers, lower costs and successful transition to value based payment programs.
- Working with providers in the community to develop an organizational model that is well suited to address High Needs, High Risk Members with the goal of reducing healthcare expenditures, eliminating waste and eliminating duplication of effort.
- In line with Lifewell's commitment and demonstration of Clinical and Operational excellence, we are applying to CARF for accreditation in 2017. CARF International is an independent, nonprofit accreditor of health and human services providers. The goal in pursuing accreditation is to apply a comprehensive set of best business and clinical practices to all aspects of our service delivery. Through this process we will continuously demonstrate to our members, community, payors, and workforce that we as an organization are committed to the most optimal outcomes for the members and families we serve.



Executive Team

PICTURED FROM LEFT TO RIGHT: **Dr. Mona Amini**, Chief Medical Officer; **Alexandra Schindler**, Director of Human Resources; **Doris Vaught**, Executive Vice-President/Chief Financial Officer; **Lindsay Johnson**, Chief Quality Officer; **Bryan Colby**, Chief Information Officer; **Thomas K. McKelvey**, Chief Executive Officer; **Nicole Cupp-Herring**, Chief Clinical Officer; **Ron Smith**, Chief Development Officer; **Kip Barnes**, Chief Operating Officer, (not pictured) **Christian Garcia**, Director of Finance



Board of Directors

PICTURED FROM LEFT TO RIGHT: **Mark Landy**, Treasurer; **Dr. Rodrigo Silva**; **Tammy Wray**, Secretary; **Jan Johnston**, Vice-Chair; **Dr. Dennis Friedman**; **Wayne Hochstrasser**, Chair; **Jim Barrett**



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