A strong commitment to performance excellence is needed to achieve this transformation. Although we are proud of our outcomes and progress historically, we brought renewed focus to this area during the past year.

One of our important achievements as an organization was to obtain CARF accreditation. Preparing for CARF enabled us to significantly improve our internal processes, including the creation of a Process Improvement Committee and a work-group focused on training segments for billing and documentation. The Lifewell team put in countless hours preparing for the survey and we were awarded a three year initial credentialing from CARF.

Employee engagement and satisfaction was another key area we chose to focus on to strengthen our commitment to performance excellence. The Lifewell team developed new tools and resources for supervisors and managers to become more knowledgeable in the areas of coaching, giving feedback and overall communication skills.

We are proud of the accomplishments highlighted in this Annual Report and excited to be a part of transforming the community-based system of care.

Letter from the CEO

Arizona’s Community Based System of Care has served behavioral health for many years. Community-based agencies, such as Lifewell, hold a special place in the community and are called on to help our family, friends and neighbors with significant mental illnesses and/or substance abuse disorders. As a community based provider we have faced many challenges over the years. We have always come through these challenges stronger and better prepared to meet our mission to help some of our most vulnerable citizens in need of our programs and services.

Today, we face what may be some of our biggest challenges ever, which include integrating behavioral and physical health services and modernizing payment systems to achieve value based purchasing. Perhaps these challenges also provide us with our biggest opportunity to transform Lifewell into an organization that is able to fully address the needs of the whole person and enable members to live longer, healthier lives.

Lifewell is paving its way to the future by building a strong foundation based in performance excellence, collaborative efforts for integrating care, and strong financial management.

Best Regards,

Thomas K. McKelvey
Chief Executive Officer

Annual Report  2017–2018
Out of over 1,500 standards reviewed Lifewell met compliance for over 95% of them.

Special thank you to Tom Williams for helping the Lifewell team achieve this success.

Tom spent countless hours assisting our team with understanding the accreditation goals and processes, reviewing CARF standards, developing departmental charters that formally established measurable goals and objectives and identifying opportunities to assure that each department met or exceeded CARF standards, and when needed, planning and completing initiatives to meet standards. All of this and he still found time to make us laugh!

In December 2017, Lifewell received the final accreditation determination from CARF congratulating us on receiving the highest level of accreditation of three years, full accreditation. In the accreditation summary CARF states:

On balance, Lifewell Behavioral Wellness demonstrated substantial conformance to the standards. Lifewell provides excellent services to members in the Phoenix, Arizona area. The leadership and staff of the organization have a strong commitment to continuous quality improvement and continuous learning. The leadership and staff of the organization are respected and appreciated by persons served and other stakeholders.

The leadership strives to develop programs that facilitate recovery for members and to develop and implement system improvements that empower direct service staff members to provide services efficiently and effectively.

In 2016 Lifewell made a commitment to become accredited by CARF International. CARF was selected as the accreditation body for Lifewell due to their reputation as an independent, non-profit, and internationally recognized accreditation organization focused on best business and clinical practices in the health and human services field. Lifewell’s goals in establishing accreditation included:

- Alignment of the organization with nationally recognized and successful best practices
- Enhanced visibility among our stakeholders including members and families served, contractors, and community partners
- Demonstration of Lifewell’s strengths in proactive decision making through continuous quality improvement and performance measurement and management

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Performance Excellence

Commission on the Accreditation of Rehabilitation Facilities (CARF)

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Data Points

115 members attended Peer Certification Classes

90 members recognized for exceeding goals in Rehab Achievement Ceremony

120 members participated in pre-GED courses

72 members found employment

5 ACT team member graduates

Members Who Received Outpatient Services in FY2017

Outpatient Services 4222

SMI Direct Care Clinic 4402

Members Who Received Specialized Services in FY2017

Supported Housing
Rehabilitation
Residential Treatment
Supported Education
Employment
Points of Pride

- Audit scores exceeded required benchmark levels for Special Assistance, Clinical Medical Record Reviews, Residential Programs, ACT Team Fidelity and Permanent Supported Housing Fidelity
- Development and initiation of formal supervisor training program
- New data reports to assist in identifying areas for improvement and fraud prevention

Initiation of pharmacy services at the South Mountain DCC

- Production increase resulting in exceeding 100% of our contracted targets in all clinical areas
- Training compliance rate equals:
  - 97.34% for 4th quarter FY2017
  - 95.51% for entire year FY2017
- Staff engagement survey resulted in a 40% increase in participation over previous year
My name is Ernest and I am 37 years old and have had a problem with alcohol and mental illness for as long as I can remember. My battle with co-occurring disorders almost came to an end last April. My depression and feelings of worthlessness had become too much to bear and I attempted to end my life. After being released from the hospital I continued to drink until my case manager was able to get me to Lifewell.

Initially I was nervous and felt out of place, however the staff helped me to feel welcomed and accepted. The staff is extremely helpful and I have learned positive coping skills, how to deal with stress, how co-occurring disorders work, changing negative thoughts and most importantly how not to let myself become overwhelmed. The staff has shown me that having a positive and healthy lifestyle is possible and now I have a strong relapse prevention plan and have become stable.

“I now wake up in the morning to feelings of optimism instead of dread.”

Even when I made bad decisions everyone here was supportive and encouraging me to move forward instead of wallowing in self pity. For that I am truly grateful coming to Lifewell was the best decisions I ever made. I now feel I have the confidence to live a good and productive life. Without Lifewell I honestly do not feel that I would have the opportunity to write this success story.

Meg
Meg is now working full time as a manager of a sober living house and has been sober for over two years.

Kandis
Kandis’ goal is to have her GED certificate by the end of this year. She has passed 3 of the 5 tests. She then wants to take the Peer Support Training.

Heather
Heather is now successfully employed part-time in a peer support position for a behavioral health company in the Phoenix area. Her quality of life has changed dramatically from being home bound to finding purpose and value serving the community.
Clinical Spotlight

“Nicole has a tremendous wealth of knowledge which she is willing to share with us and challenges us to expand the way we look at solutions and situations.” - Lifewell

Nicole Cupp-Herring
Chief Clinical Officer
With Lifewell since 2002

In 2002, I graduated with my Master’s in Counseling and began my career as a therapist in behavioral health with Lifewell Behavioral Wellness. As Chief Clinical Officer, I have over 16 years of experience in the behavioral health field and oversee all aspects of Lifewell’s clinical programs.

I take pride in the quality care we provide to our clients, focusing on quality clinical outcomes and maintaining client satisfaction by offering client-centered, strength-based services that improve the well-being of clients served.
Clinical Spotlight

“I am grateful to have such an extremely competent, skillful, and outstanding group of individuals on my team!” - Nicole Cupp-Herring

Dan Wheeler
Senior Director of Community Living and Residential

Amber Hoch
Senior Director of Outpatient and Rehab

Nicole Cupp-Herring
Chief Clinical Officer

Shana Hanley
Senior Director of SMI Clinics

Our Mission
• To inspire hope
• To provide opportunities for healing
• To support better health

Our Goals
• Improve health
• Establish a stable home
• Support community integration
• Promote the realization of self-value

Our Values
• Person-centered
• Evidence-based
• Quality-driven
FY2017 Total Revenue was $37,640,000 and Total Expenses were $38,270,000. While Lifewell did incur a loss of about $680,000 this year, we continue to have a strong balance sheet and financial position.
Financial Highlights

FY2017 Program Expenses

- SMI Clinics 43%
- Outpatient 28%
- Residential 11%
- Housing 7%
- Other 2%
- Mgt & General 9%

91% of total expenditures were directly related to program costs.

At a Glance

- Lifewell refinanced loan balances in FY2017, resulting in significant annual savings to the organization.
- Lifewell fully encountered all of its contract funding in FY2017, by category and by program including the SMI clinics. Way to go team!
- Lifewell had a significant reduction in temp and locum tenens cost for FY2017 due to successful hiring of many of these positions.
Pathways to Our Future

Integrated care development and expansion of services will continue to be key elements for the foreseeable future in ensuring that Lifewell provides exceptional services for our members. Following are important activities in these areas:

Integrated Care Collaboratives and Activities:

- AHCCCS Targeted Investments Program (TIP) to develop clinical processes for integrated care.
- Practice Innovation Institute (Pii) which is part of the CMS Transforming Clinical Practice Initiative.
- Virtual Integrated Care partnerships with PCP offices near our South Mountain and Windsor Direct Care Clinic locations.
- Health Current, the state-wide Health Information Exchange (HIE) system for sharing of electronic member data across providers.

Expansion of Services:

- Opening of the Lifewell Genoa Pharmacy to our South Mountain Direct Care Clinic.
- Training and implementation of additional evidence based practices including Cognitive Behavioral Therapy with Substance Use Disorders (CBT-SUD), Eye Movement Desensitization Reprocessing (EMDR), and Acceptance and Commitment Therapy (A-C-T).
- Recognized as a community employment resource Access Point location for Arizona @ Work City of Phoenix Innovative Workforce Solutions.
- Additional SMI Direct Care Clinic Services location with the addition of 1300 new clinic members expected in May 2018.
- Increase in the number of funding sources for the GMH/SA population beginning in October 2018.
Executive Team

Kip Barnes, Chief Operating Officer; Thomas K. McKelvey, President and Chief Executive Officer; Nicole Cupp-Herring, Chief Clinical Officer; Alexandra Schindler, Director of Human Resources; Doris Vaught, Executive Vice-President and Chief Financial Officer; Dr. Greg Gale, Chief Medical Officer; Ron Smith, Chief Development Officer; Christian Garcia, Director of Finance; Noel Collier, Chief Quality Officer; Bryan Colby, Chief Information Officer

Board of Directors

Dr. Rodrigo Silva, Chair; Mark Landy, Treasurer; Amanda Nash, Secretary; Michael O’Driscoll, Member; Jim Barrett, Vice-Chair