

# Executive Report

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Third Quarter 2008



## MHCA's 2008 Fall Conference

San Diego is the city. November is the month. Mark your calendar - it's time for MHCA's 2008 Fall Conference which must mean this year is speeding toward completion. Our dates are November 11-14, and we will convene for the first time at the Manchester Grand Hyatt Hotel near San Diego's beautiful downtown waterfront. Make your plans now to join us for another great opportunity to reflect, refine and renew efforts to pool talents and resources as together MHCA members advance the best in behavioral healthcare service delivery.

On Tuesday the MHCA/IOM Transformation Workgroup will hold its next to last meeting with plans to wrap up their two year long study. They expect to make a full report to our 2009 Winter Conference and Annual Meeting in February. Also convening on Tuesday will be a newly formed Task Force on Dashboards and other Metrics. The Task Force has been assembled as an outgrowth of common issues being explored by MHCA's New Trends Forum, Applied Research Focus Group, Information & Technology Focus Group, IOM Workgroup and our Benchmarking project leaders. Chairmen and selected others will serve as a core study unit and report their initial findings and recommendations to the MHCA Board of Directors.

Wednesday's keynoter is Jim Clemmer, founder of The Clemmer Group, a management consulting firm specializing in organization, team and personal transformation. Clemmer has authored five best-selling books and consulted with countless companies, the public sector, universities and healthcare organizations. Visit his website: [www.jimclemmer.com](http://www.jimclemmer.com) to learn more about this dynamic speaker.

Information and technology staff will find our two day IT Focus Group of great interest. It will be led by Chairman Chris Wyre and will meet both Wednesday and Thursday afternoons from 1:30 - 4:30. In addition our Applied Research Focus Group will meet both afternoons under the leadership of Chairman Greg Speed. Also on Wednesday's agenda is the afternoon Futures Forum led by Jim Gaynor. Our Learn About It topic for San Diego is the International Initiative for Mental Health Leadership. IIMHL Director Fran Silvestri has been invited to describe the work of this organization that now involves eight countries. Their 6th leadership exchange and conference will be held in Australia in March 2009.

Thursday's general session includes three presentations by guest speakers. First, Dr. May Ahdab of UNI/CARE will present "Emerging Trends in Information and Communication Technology." Our IT participants will find this topic especially informative. Following Dr. Ahdab's comments, Nicholas Bozzo, Managing Director

of Negley Associates and President of Mental Health Risk Retention Group, will provide important new information about workers compensation coverage now offered through his firm together with Liberty Mutual Insurance Company. Concluding the morning agenda will be a presentation by Essential Learning on how e-learning can be used as a vehicle for consumer empowerment.

*See San Diego, page 8*

*Jim Clemmer*

*MHCA Keynoter: November 12, 2008*

*Practical Leadership - From Inspiration to Application*



*A Message from the President*

Don Hevey

## Keeping It in Perspective

**T**he nation's political contests are (finally) entering the home stretch. Politicians are asking "Are you better off now than you were four years ago?"

When politicians pose this question, we know they are asking us to do a quick economic calculation. Is your salary higher? Is your home worth more? Is your 401(k) rising in value?

Given the bruised condition of the U.S. economy, housing market and stock market, millions of Americans could be forgiven for responding with an emphatic "no" - and perhaps a few overripe tomatoes.

You may not be earning more than you were four years ago. Your home or your stock portfolio may be worth less. But is that really how we determine whether we are better off?

Maybe you fell in love over the last four years. Maybe you took up fly-fishing, sailing or golf. Maybe you moved to an exciting new city. Maybe you spent the last four years honoring your profession, learning more about it, helping more people than ever before.

Economic statistics are fine as far as they go. But they don't go far in measuring a life well lived.

Life can't just be about the determination to get and have more. As President Calvin Coolidge said, "No person was ever honored for what he received. Honor has been the reward for what he gave."

Are you better off than you were four years ago? Only you can determine what the question even means. But the answer shouldn't require a calculator.

They understand this in Scotland. When I visited several years ago, the locals would often clink my glass, give me a wink, and announce in that distinct Scottish brogue:

"Be happy while you're living, for you're a long time dead".

### MHCA MISSION STATEMENT

MHCA is an alliance of select organizations that provide behavioral health services. It is designed to strengthen members' competitive position, enhance their leadership capabilities and facilitate their strategic networking opportunities.

### THE EXECUTIVE REPORT

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### MHCA BOARD OF DIRECTORS 2008

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143 Members in 34 States

## Connecting Across Cultures:

# MHCA Members Host Iraqi Visitors

In a three and one half week span of time, a microcosm of cross cultural exchange blossomed in Battle Creek, Michigan this past summer. At Summit Pointe, where MHCA member Erv Brinker is CEO, four Iraqi health professionals were hosted during what became an enlightening and encouraging visit. Brinker and Victoria Vink, Summit Pointe's Director of Research and Development, traveled first to Washington, D.C. where the two met their guests during a week long introductory training session at SAMHSA (the federal Substance Abuse and Mental Health Services Administration). The visit, which eventually will include seven teams of Iraqi visitors to the United States, was made possible through a collaborative between SAMHSA and the Iraqi Minister of Health.

The team that traveled to Battle Creek included two male psychiatrists, a female pharmacist and a female social worker. All but the social worker had studied for their advanced degrees using English as the learning language. In Iraq, prescriptions are written in English since most drug companies are either U.S. based or at least operate with English as their primary language. Therefore, for the most part language did not present a significant barrier to understanding among hosts and guests.

The primary focus for the Summit Pointe visit was services for older adults. Teams to other facilities focused on substance abuse, children's services and trauma treatment. Vink reports that in Iraq the notion of end-of-

life care, such as our hospice programs offer, is an unknown concept. There, families provide for their loved ones, often enlisting the support of various neighborhood talents. In all of Iraq, a



country basically the size of California, there are only two nursing homes. Similarly, when a patient is admitted to hospital, it is not unusual for twenty or more family members to show up and take an active part in the patient's care. In fact, when a patient is admitted, a family member is admitted as well!

When asked what preconceptions might have been shattered in the face-to-face reality of this exceptional visit, Vink immediately said, "The Iraqis have such a wonderful sense of humor – we weren't expecting that!" Practical jokes were very popular. She said that the guests seemed hungry for information and very pleased for the chance to get to know Americans other than the U.S. soldiers they had met back home. The guests had found their

hosts much gentler than they expected although more business like than their own people. When starting meetings, the Iraqis were much more inclined to take considerable time "warming up", asking about families and leisurely enjoying refreshments before beginning the work at hand.

Although the guests were housed in a nearby hotel and were given ample opportunities to explore Battle Creek on their own, Summit Pointe staff were available each evening to dine with them and to show them around the area. Brinker entertained the group at his own home on the 4<sup>th</sup> of July – understandably a big event to share with these new friends from a very foreign land.

At the end of the visit, the guests, Brinker and Vink returned to Washington,

D.C. for a one week debriefing with other participants in the larger project. Would the folks at Summit Pointe do it all again? Vink says emphatically that the experience was a wonderful one, tiring for all, but satisfying beyond expectations. "I expected to simply march through this project," Vink admits, "but we learned so much from them and warmed to them so completely. Now we are in touch with our new friends via Skype weekly."

When there is so much working against Iraqi-U.S. understanding, it is reassuring to hear that in Battle Creek, in one behavioral health center, four Iraqis connected with their American counterparts both to learn from and contribute to each other's success. This is diplomacy we can all embrace. ❖

## MHRRG Elects Buchwalter, Recognizes Aliber for Lengthy Service

At its quarterly Board meeting on August 22, 2008 in Denver, the Directors of Mental Health Risk Retention Group (MHRRG) elected Susan D. Buchwalter, PhD as Chairman to take office in October 2008 and continuing for a three year term commencing February 2009. Dr. Buchwalter is President and Chief Executive Officer of The Counseling Center of Wooster, Ohio. She was first elected to the MHRRG Board in February 2000. Continuing officers include Vice Chairman Harriet L. Hall, PhD, Treasurer John McKeever and Secretary Dale Shreve.

Buchwalter will follow in the footsteps of the first and only MHRRG Board Chairman, Gil Aliber of Wayland, Massachusetts. When first elected in 1987 and until 1996, Aliber was CEO of the Rutland Behavioral Health Center in Rutland, Vermont. He was then re-elected as an outside Director and has continued his service as Chairman.

The MHRRG Board along with staff of the underwriting management company, Negley Associates, will honor Aliber at a dinner party on October 17 when they convene in Woodstock, Vermont for their fall meeting.

MHRRG was founded by MHCA in 1987 to provide reliable and affordable liability insurance for the behavioral healthcare field. The company is endorsed by both MHCA and the National Council for Community Behavioral Healthcare. Domiciled in Vermont and managed by Negley Associates of New Jersey, MHRRG, is owned by its policyholders, offers stabilized premiums, protection against arbitrary cancellation, quality coverage, and a loss prevention program. Available coverages include professional liability, general liability, directors and officers liability, and excess liability. In addition, through Negley Associates, insureds have

access to both workers compensation and automobile coverage.

Serving as Directors, in addition to the officers and Aliber, are MHCA members Debra Falvo, Maggie Labarta, Bennett Cooper, Howard Bracco and Wes Davidson, and outside director George Chaffee, former Vermont insurance commissioner.

In San Diego at MHCA's 2009 Fall Conference, Negley Managing Director Nicholas Bozzo will make a general session presentation on Thursday describing the newly available workers compensation coverage.

For more information about MHRRG and/or Negley Associates, visit MHRRG's website: <http://www.mhrrg.com> or contact Negley Associates: 973-239-9107 or 800-845-1209. Marilyn Udis, Vice President of MHRRG and Negley Associates regularly provides information as part of an exhibit booth at MHCA quarterly conferences. ❖



Board of Directors  
Mental Health Risk Retention Group - 2008

**Seated from left:** Ron Zimmet, Attorney; Bud Negley (Negley Associates); Gil Aliber; Harriet Hall, Don Hevey (MHCA); George Chaffee  
**Standing from left:** Debra Falvo, Dale Shreve, Susan Buchwalter, John McKeever, Maggie Labarta, Sue Cohen (Negley Associates); Bennett Cooper, Howard Bracco, Wes Davidson, Nicholas Bozzo and Marilyn Udis (Negley Associates)

## Targeting Sexual Misconduct

The 2009 Negley Awards for Excellence in Risk Management will target the troublesome and highly liable topic of sexual misconduct within the behavioral healthcare industry. Cases brought against behavioral health centers for sexual misconduct almost always include two general claims. First, plaintiffs allege that the center is liable for the employee's inappropriate behavior because the misconduct was made possible by the fact that the employee made contact with the patient through employment at the center. Second, plaintiffs claim that the center is directly liable for its own negligence alleging among other things negligent training, hiring and supervision.

Good risk management and protection of patients includes substantial attention on the part of management to creating a norm against sexual misconduct.

In its 18<sup>th</sup> year, the Negley Awards recognize and reward outstanding achievements in risk management by members of MHCA, the National Council, and all MHRRG insureds/



shareholders. Three cash awards will be conferred – one in the amount of \$15,000 and two for \$7,500.

Applications are being made available online by both MHCA and the National Council, and deadline for acceptance of applications is December 5. Three finalists will present their programs both at the MHCA 2009 Winter Conference in Clearwater Beach, Florida (February 19), where they will be judged, and the 2009 Annual Confer-

ence of the National Council in San Antonio, Texas (April 5-8), where awards will be presented. Judges are members of the Board of Directors of the Mental Health Risk Retention Group (MHRRG). Organizations under the direction of MHRRG Board members are ineligible to participate.

Winners in last year's Negley Awards competition were: Grafton, Inc. (Jim Gaynor, CEO), Milestone Centers (Barbara Conniff, CEO), and The Providence Center (Dale Klatz-

ker, CEO). With this *Executive Report* is a supplement featuring the program of Milestone Centers. Grafton's program appeared with our Second Quarter *Executive Report*, and the Providence Center's program will appear as a supplement in the Fourth Quarter.

For more information about this year's Negley Awards program, contact Tara Boyter (<mailto:tboyter@mhca.com>) or phone 850-942-4900 ❖

## Shareholders Conduct MHRRG Elections

Of the eleven Directors on the Mental Health Risk Retention Group Board, three are elected by the Class C Shareholders. The terms of two of those positions, presently held by Bennett Cooper and Dale Shreve, both MHCA members from Ohio, end in February 2009. A call for nominations will be sent November 5 with subsequent ballots sent to shareholders on January 5, 2009.

Class C Shareholders initially invest 1% of their budget up to \$75,000 in

MHRRG while Class D Shareholders can buy in for just \$525 per share (minimum three shares). MHCA is the sole Class A Shareholder and appoints six Board positions, three of whom currently are "outside directors". The National Council is the sole Class B Shareholder and appoints two Board positions. In keeping with MHRRG's commitment to peer representation on the Board, eight current Directors are CEOs of behavioral healthcare organizations.

**Did you Know?** In almost every year since its founding, MHRRG has paid an annual dividend to its insureds/shareholders. The dividend is two-part, based on both percentage of premium (8.5% in 2007) and payment per share (\$50 in 2007). Since 1991 total dividend payout totals \$7,057,010.



## First Lady and Keynoter Set the Tone in Colorado

# Summer Conference Topped Expectations for Content,

Excitement was in the air as MHCA members gathered in Denver, Colorado for our 2008 Summer Conference there August 19-22. With the Democratic National Convention beginning the following week, the city was polished and proud. Though we realize we weren't the biggest game in town, MHCA members might as well have been just that as Colorado's First Lady Jeannie L. Ritter welcomed us on Wednesday with words of encouragement and appreciation.



*Above from left: MHCA Board Chairman Denny Morrison, Colorado member Harriet Hall, First Lady Jeannie Ritter and MHCA CEO Don Hevey at General Session.*

*Left: Keynoter Scott Deming and MHCA Chair Don Hevey check out some magic numbers*



It is a tribute to our Colorado members that Mrs. Ritter came well informed and fully aware of the challenges we face and the solutions we offer in the field of behavioral health care. Her personal energy was contagious, her interest was informed, and her concern was evident. The First Lady has championed behavioral health issues in Colorado – her dedication is an invaluable asset not only in the Centennial State but for us all.

Following Mrs. Ritter's welcome address, keynoter Scott Deming delivered a top notch presentation on "Creating a Powerful, Emotional Brand." This marketing and

communications executive wowed his audience, earning the highest evaluation in the 24 year history of MHCA conference presentations. With an emphasis on becoming not only "better" but "different", Deming urged providers to offer the unexpected and thereby gain satisfied clients and committed contributors. As one listener said, "Deming was very inspiring and provided solid insight for personal & corporate improvement. I walked away ready to shatter expectations."

Wednesday afternoon's selections included our "Learn About It" program on using MHCA's Mergers/Acquisitions and Affiliations Manual, Session I

of the Marketing Focus Group, an Applied Research Focus Group and our Futures Forum. Learn About It presenters included Tom Riggs, Dan Ranieri and Kathy Reynolds whose varying experiences using the "mergers manual" provided useful ideas for application. The Marketing Focus Group heard via remote connection from Behavioral Healthcare magazine editor-in-chief Doug Edwards as well as from onsite presenters Shannan Ritchie of the Cleveland Clinic and Marymount Hospital, Ron McDaniel of Buzzoodle and MHCA member Ann Borders of Cummins Behavioral Health Systems. Topics included development

# Inspiration and Excitement

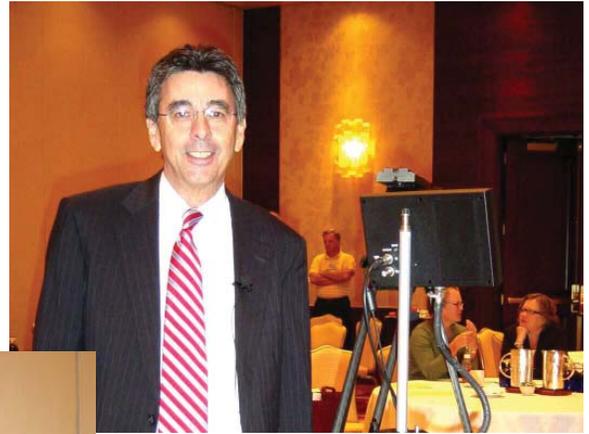
and use of a branding manual and the growing popularity and application of blogging to promote behavioral healthcare. Applied Research chairman Greg Speed led that group in a lively discussion on how to broaden the reach of their work through cooperation with other groups such as the IOM study, New Trends, IT and MHCA's benchmarking project. MHCA Vice Chairman Tony Kopera led the small but dynamic Futures Forum discussion.



On Thursday morning, general session presentations were provided by attorney Ron Zimmet, international guest Gordon Boxall of the MCCS Society, and financial advisor John McKeever. Zimmet's material on "To Treat or Not to Treat the Potentially High Risk Patient" will become part of the risk management education program of Mental Health Risk Retention Group. Boxall described England's Mental Health Helpline program, and McKeever interpreted current national and international financial trends with advice on preparing personal and corporate portfolios to "weather the storm". In the afternoon our New Trends Forum explored the use of dashboards and other metrics while Session II of the Marketing Focus Group heard from MHCA members Jeanne Oliver of the Jefferson Center and Dianne Flaherty of The Providence Center about how they determine a return on investment for their marketing programs.

We are grateful to our exhibitors and sponsors whose presence with us informs and supports our work. These included ClaimTrak Systems, Inc., GenoaHealthcare, iCentrix Corporation, InfoMC, Inc., Mental Health Risk Retention Group, QoL meds, and Qualifacts Systems, Inc.

Another terrific MHCA conference!! ❖



*Above: Attorney Ronald K. Zimmet  
Left: Don Hevey, guest Gordon Boxall and host Rich DeHaven*



*Above: Financial Advisor John McKeever with Don Hevey*



*Marketing Focus Group Presenters:  
Above: Dianne Flaherty, Marketing Chairman Nelson Burns and Jeanne Oliver  
Left: Standing - Nelson Burns and Ron McDaniel; Seated - Ann Borders and Shannan Ritchie*

## San Diego, continued from page 1

In the afternoon, conference participants will choose among the New Trends Forum (Integration of Primary and Behavioral Health Care), Session



*Enjoy a complimentary evening cruise with Wednesday reception/dinner hosts Genoa Healthcare.*

II of both the IT and Applied Research Focus Groups, and an Essential Learning Users Group. In addition, both the Applied Research Committee and the Marketing Committee will meet.

Generous hosts will provide our evening receptions. On Wednesday, Genoa Healthcare plans a special cruising event as part of their ongoing partnership with MHCA - come sail away on the Lord Hornblower, boarding just a few minutes walk from our hotel. Thursday evening's gracious hosts are Negley Associates together with Mental Health Risk Retention Group.

Exhibitors throughout the conference will include ClaimTrak Systems, Inc., Essential Learning, Genoa Healthcare, iCentrix Corporation, Mental Health Risk Retention Group, QoL meds, Qualifacts Systems, Inc., The ECHO Group, and UNI/CARE Systems, Inc.

With San Diego International Airport only three miles northwest of downtown San Diego and the fun filled Gaslamp Quarter just blocks away from our hotel, you can easily move about the city from first arrival to day of departure. From suave steakhouses and eclectic ethnic fare, dinner clubs to sultry jazz bars, 100-plus restaurants

are all situated within blocks of each other. The best part: all this is within walking distance from the Manchester Grand Hyatt. And for you sports fans, the San Diego Chargers will play the Kansas City Chiefs on Sunday afternoon, November 9, at Qualcomm Stadium - can you get to San Diego a little early and take in the game? California beckons! ❖

## MHCA Board of Directors Election Process Underway

Keeping in step with national elections, MHCA is conducting its own Board nomination and election process this fall. Current Board members whose terms expire in February 2009 are Susan Buchwalter, Tony Kopera and Grady Wilkinson from the Midwest Region, Wes Davidson and Gary Lamson from the Northeast Region, and Chris Wyre from the South Region. A call for nominations was sent via CEO Listserve on September 5. All nominations and elections will be conducted electronically via MHCA.com. Deadline for nominations is September 26. If necessary, runoff elections will be conducted in November.

A separate ballot will be issued in January to the Board of Directors for election of officers. New Board terms begin February 20, 2009 at the close of the Board meeting in Clearwater Beach, Florida ❖

## A New CEO in Florida

Peace River Center in Bartow, Florida named a new CEO in early September. He is Mr. J. Gilbert Sierra who has an extensive background as a CEO, COO, consultant and strategic advisor, and brings to Peace River a wealth of experience in providing quality care to consumers. His career has included work in New

# CALENDAR

### MHRRG Board Meeting and Recognition Dinner for Gil Aliber

*Date:* October 17, 2008

*Location:* Woodstock, Vermont

### MHCA 2008 Fall Conference

*Dates:* November 11-14, 2008

*Location:* Manchester Grand Hyatt  
San Diego, California

*Phone:* 619-232-1234

*Rate:* \$299 single/double

*Deadline:* October 13, 2008

### MHCA 2009 Winter Conference and Annual Meeting

*Dates:* February 17-20, 2009

*Location:* Sandpearl Resort  
Clearwater Beach, Florida

*Phone:* 727-441-2425  
or 877-726-3111

*Rate:* \$283 single/double

*Deadline:* January 13, 2009

### IIMHL 2009 Leadership Exchange

*Dates:* March 2- 6, 2009

*Location:* Brisbane, Queensland  
Australia

*Primary Venue*

Rydges South Bank Brisbane

*Secondary Venue*

Mantra South Bank Brisbane

*More Information:*

[www.iimhl.com](http://www.iimhl.com)

### MHCA 2009 Spring Conference

*Dates:* May 12-15, 2009

*Location:* Westin Savannah Harbor  
Savannah, Georgia

*Phone:* 800-228-3000

*Rate:* \$251 single/double

*Deadline:* April 16, 2009



*Gil Sierra*

York and more recently in Heathrow and Orlando, Florida. He replaces Bennie Allred who served as Interim following former CEO Mary Lu Kiley. ❖