

San Luis Valley Behavioral Health Group Board Meeting

October 28, 2025, 5:00 pm

San Luis Valley Behavioral Health Board Room

Vision: To improve the quality of life for the residents of the San Luis Valley.

Mission: To provide access to quality behavioral health services that enrich lives and promote wellness. We are driven by a profound respect for human dignity and a desire to serve the unrepresented, the disenfranchised, and those who experience behavioral health distress.

Values:

Excellence

Activism

Ethical Practices

Innovation

Diversity

<u>Agenda</u> <i>*Indicates an action item/vote</i>	
Roll Call/Declaration of Quorum Pat Stanford	5:00 pm-5:01 pm
*Approval of Agenda Pat Stanford	5:01 pm-5:03 pm
*Approval of Minutes Pat Stanford	5:03 pm-5:05 pm
Community Partnership Update-Crisis Jennifer Silva	5:05 pm-5:20 pm
Board Fiduciary Duties/Governance Training Matt Landis	5:20 pm-5:50 pm
Annual Report Victoria Romero	5:50 pm-6:05 pm
Quarterly Strategic Plan Update Victoria Romero	6:05 pm-6:20 pm
*Finance Report Kyle Turnwall	6:20 pm-6:40pm
Executive Committee Report Pat Stanford	6:40 pm -6:43 pm
CEO Report Victoria Romero	6:43 pm-6:53 pm
Correspondence Review Angie Gallegos	6:53 pm-6:55 pm
Other Business Pat Stanford/Victoria Romero	6:55 pm-6:59 pm
Adjournment- Next Meeting: November 25, 2025 Pat Stanford	6:59 pm-7:00 pm

San Luis Valley Behavioral Health Group Board Meeting

September 30, 2025, 5:00 pm

San Luis Valley Behavioral Health Board Room

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Agenda <i>*Indicates an action item/vote</i>	
Roll Call/Declaration of Quorum Member Present: Pat Stanford, Mark Manzanares, Laurie Rivera, Jerry Gallegos, Louise Sanchez, Olivia How, Jody Kern, and Victoria Romero Members Excused: George Wilkinson Staff Present: Kyle Turnwall and Angie Gallegos Guests Present: Bret Wicert and Wes Ursic	5:00 pm-5:01 pm
*Approval of Agenda It was M/S by Laurie Rivera and Jody Kern to approve the agenda as with the added item: CBHC Conference presentations. Motion carried.	5:01 pm-5:03 pm
*Approval of Minutes It was M/S by Mark Manzanares and Olivia How to approve the minutes dated August 26, 2025, with the correction to add Jody Kern to Member Present. Motion carried.	5:03 pm-5:05 pm
CBHC Conference Presentations Pat Stanford, Olivia How, Louise Sanchez, and Victoria Romero attended the 2025 CBHC Conference in Breckenridge. The theme of the conference was "Resilience Rooted in Strength and Fortitude". The session that had the most impact on Pat was entitled "Young Minds, Big Challenges," which focused on the challenges of pediatric mental health. The two keynote speakers moved Olivia. Victoria found the session from the BHA and HCPF to be insightful. Louise was recognized at the conference for her 35 years of service at SLVBHG.	
Audit Presentation Bret Wichert, from Biggs Kofford, presented on his audit findings for FY25. He stated that the audit was clean, and SLVBHG is financially very healthy. His consolidated financial statements, the single audit, and his letter of recommendations were included in the board packet for review.	5:05 pm-5:35 pm
Investment Presentation Wes Ursic gave an update on our investment portfolios. His main report was included in the board packet for review. Angie will send out his second handout via email after the meeting.	5:35 pm-6:05 pm

*Finance Report Kyle Turnwall presented the financial statements for the month ending August 30, 2025. He reviewed the balance sheet liquidity, operating revenue, operating expenses, the Medicaid PPS reconciliation, and the consolidated statements of operations. It was M/S by Olivia How and Laurie Rivera to approve the financial statements and file them for audit. Motion carried.	6:05 pm-6:25 pm
Executive Committee Report Pat Stanford reported that there was no meeting this month.	6:25 pm -6:25 pm
CEO Report Victoria Romero presented on the CEO report. The report was included in the board packet for review.	6:25 pm-6:40 pm
Correspondence Review Angie Gallegos presented three items: the City of Alamosa Suicide Awareness and Prevention Month proclamation, a thank-you note from Jade Communications, and the John and Margaret Biles Guardian Angel Award from Tu Casa.	6:40 pm-6:45 pm
Other Business Victoria Romero reviewed the results of the Board Evaluation that all board members were asked to complete. She will send out the full report after the meeting. Victoria will be reviewing an AI evaluation program next week. This program will not incur an additional cost to utilize.	6:45 pm-6:59 pm
Adjournment- Next Meeting: October 28, 2025 The meeting was adjourned at 7:09 pm.	6:59 pm-7:00 pm



SAN LUIS VALLEY
Behavioral Health Group
Dedicated to Hope, Healing and Recovery



2025 Annual Report

**STRENGTH IN COMMUNITY: MEETING NEEDS, BREAKING
BARRIERS, BUILDING HOPE IN THE SAN LUIS VALLEY**



WWW.SLVBHG.ORG



MISSION & VISION



Mission: To provide access to quality behavioral health services that enrich lives and promote wellness, driven by respect for human dignity and a desire to serve the underrepresented, disenfranchised, and those experiencing behavioral distress.

Vision: To improve the quality of life for residents of the San Luis Valley.

Main Topics



FINANCIAL
STATEMENTS



DATA
REPORTS



PROGRAM
HIGHLIGHTS



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Flashback Performance

2025

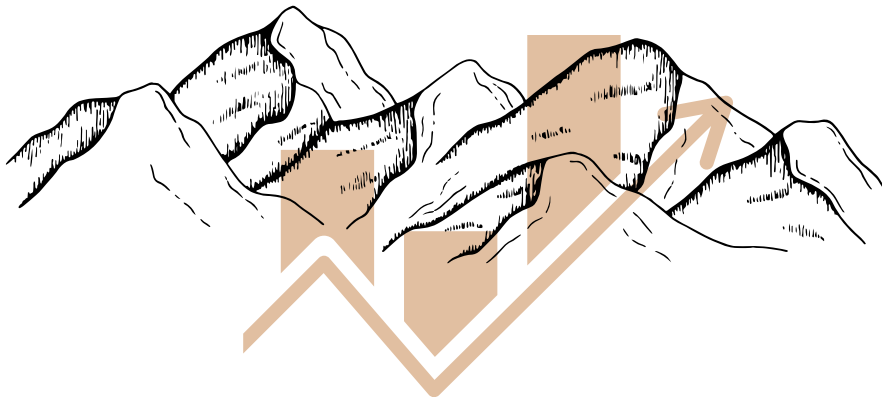
Reflections
from our CEO,
Victoria Romero



This year has been one of growth, innovation, and resilience at San Luis Valley Behavioral Health Group. We strengthened core programs, launched new relationships with our new Regional Accountability Entity (RAE), our new Behavioral Health Administrative Service Organization, and sustained essential peer support and care coordination roles.

From emergency crisis response to school-based prevention, we meet our community where they are, whether that was in their homes, at community events, online, or in our clinics. The results are a testament to our staff's dedication, our partners' collaboration, and the trust placed in us by the San Luis Valley community. As we move into the next fiscal year, we remain committed to breaking down barriers, expanding culturally responsive care, and ensuring every person in the Valley can access the services they need to thrive.

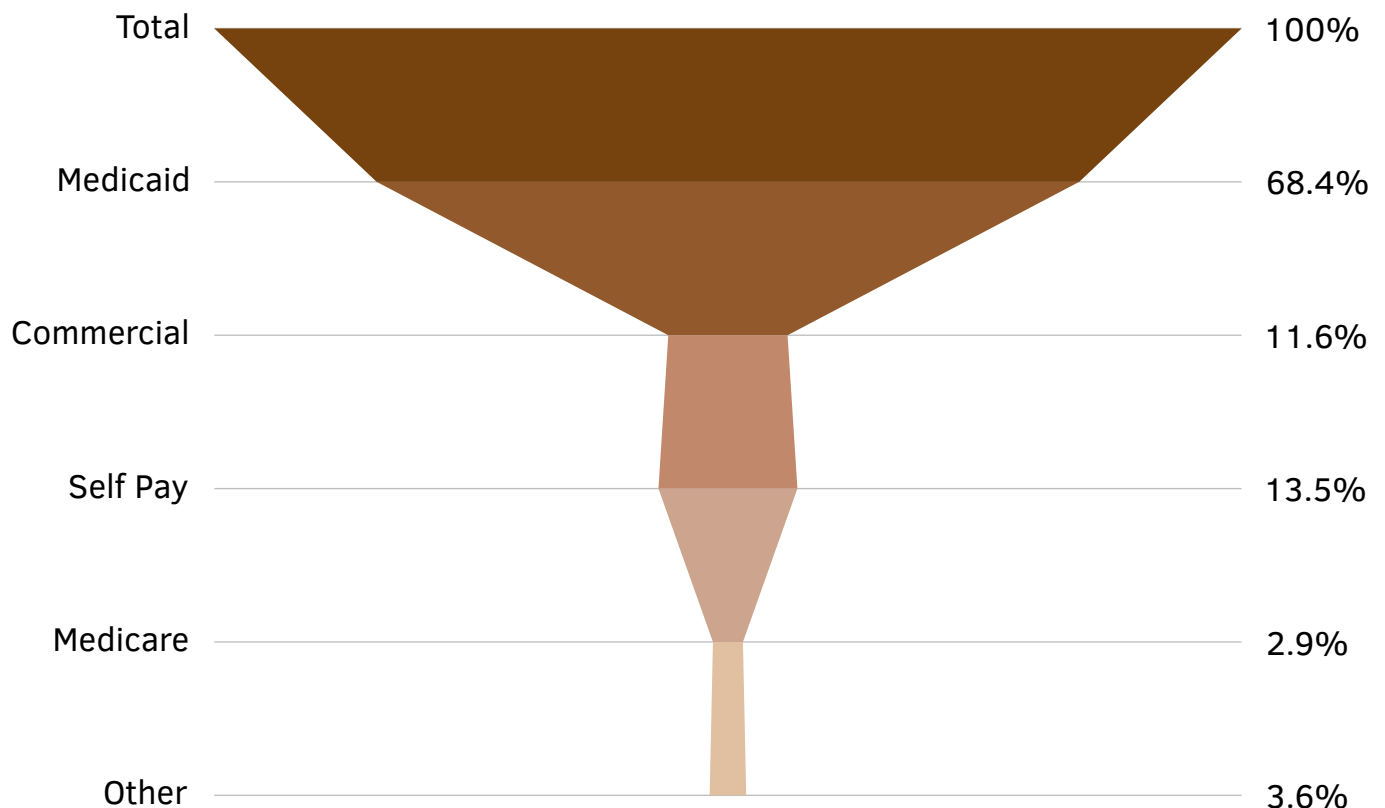
BY THE NUMBERS



San Luis Valley Behavioral Health Group is pleased to present our achievements, challenges, and innovative progress made in FY24-25. In this year's annual report, you will find detailed data illustrating our impact across the San Luis Valley.

The graph below displays the total encounters we had this fiscal year and the types of insurance/payment we accepted for those encounters. Encounters refer to face-to-face interactions between a client and a behavioral health professional for services. Clients may have multiple encounters on the same day. Encounters from the following guarantors are not displayed on the graph below as the total was less than 2% of our total encounters: State of CO (1.6%), CHP+ (1.8%), Local Gov. (0.2%). Below are the top 5 guarantors in fiscal year 2024-2025.

Encounters by Guarantor



FISCAL YEAR 2024-2025

Total
Individuals
Served



3,664

Total Counties
Served

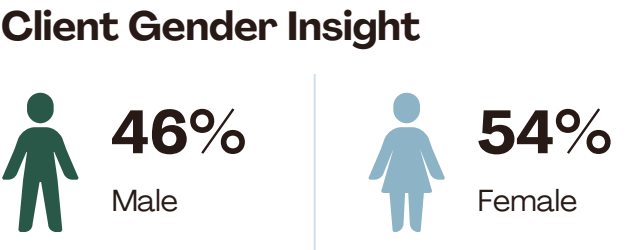
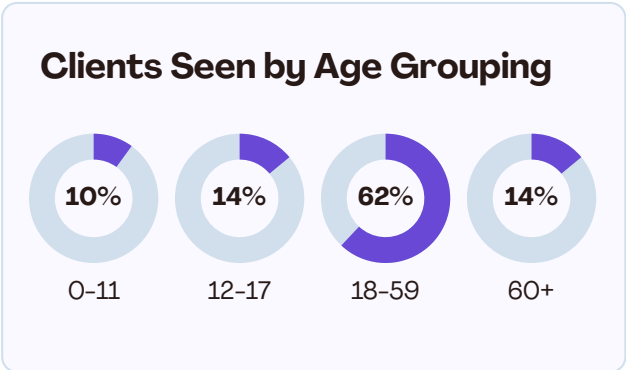
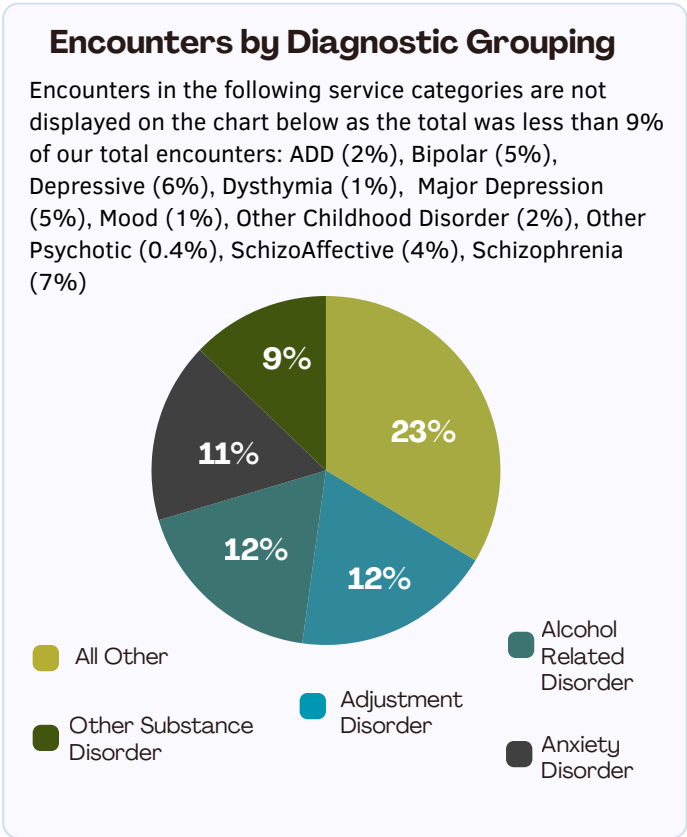
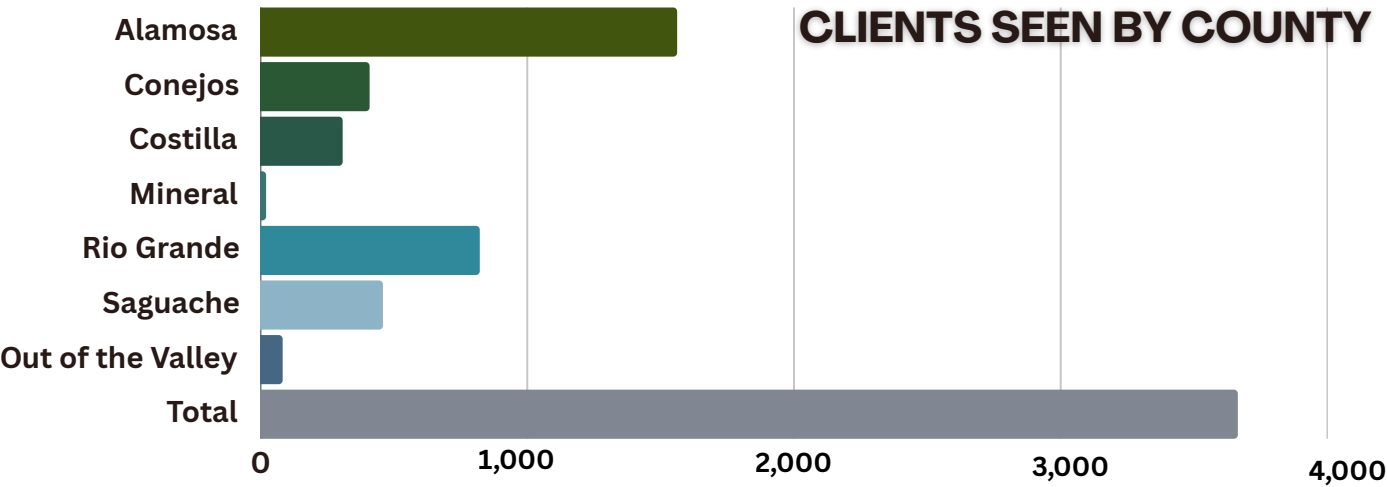


6

Total Number of
Service Categories
Provided



10



Encounters by Service Category

2024



Service Category	Total	Percentage
Assessment/Screening	3,122	6%
Case Management	8,741	16%
Emergency/Crisis	894	2%
Group/Family Therapy	9,071	17%
Individual Therapy	17,949	34%
Other Service	1,182	2%
Medication Admin/Mgmt	9,304	17%
Peer Svcs./ACT/Outreach	3,154	6%
Total	53,417	100%

Success Stories & 2026 Strategy



Mi Esperanza Emergency Services Case Manager

“Behavioral Health has significantly helped me on my journey of self-discovery and becoming a better person, thanks to the dedicated staff. Rick Esquibel from Mi Esperanza Wellness Center has been a tremendous guide, earning my trust through his unwavering support and assistance. He is the person I trust most at the Wellness Center, always doing his best to help.” - **Alamosa Resident**

Great Groups

“...Terrell deserves a medal or award for running the groups on Mondays. He teaches in a way that is both fun and easy to learn...” - **Alamosa Resident**

2026 Strategic Priorities

- Expand rural outreach and sustain key services.
- Deepen Medicaid stigma-reduction messaging and outreach.
- Grow early childhood and senior services capacity.
- Continue workforce development to retain skilled professionals.



Terrell Russell and Riley Harrelson



47%

OF OUR CLIENTS IDENTIFY
AS HISPANIC, WHILE 45%
IDENTIFY AS NON-
HISPANIC, AND 8%
DECLINED TO ANSWER

STATEWIDE SYSTEM REDESIGN: BHA, RAE & BHASO IN THE SAN LUIS VALLEY

Colorado's behavioral health system has undergone a major transformation to improve access, quality, and coordination of care. At the center of this change is the Behavioral Health Administration (BHA), created in 2022 through House Bill 22-1278 to oversee licensing, regulation, and administration of behavioral health services statewide.

A key part of the new structure is the introduction of Regional Accountable Entities (RAEs) and Behavioral Health Administrative Service Organizations (BHASOs). RAEs manage Medicaid behavioral health benefits and coordinate care within their regions, while BHASOs focus on safety-net services, crisis response, and linking individuals to the right supports.



Local Impact

This year, the San Luis Valley transitioned to a new RAE and BHASO, which will now serve as our region's central hubs for behavioral health coordination. These organizations will:

- Manage and fund local safety-net services.
- Streamline crisis response and referral pathways.
- Standardize reporting and quality measures.
- Foster collaboration among regional providers.

What it Means for SLVBHG

SLVBHG is actively preparing for this shift by:

- Updating contracts and service agreements.
- Aligning administrative and billing processes with new RAE/BHASO standards.
- Training staff on new referral and care coordination workflows.
- Engaging in regional planning to ensure culturally responsive services remain a priority.

Our role as the San Luis Valley's community mental health center remains the same—to meet people where they are with compassionate, effective care. Under the new statewide structure, we are committed to ensuring that rural voices are heard, local needs are addressed, and every resident can access the behavioral health support they deserve.



Vanessa Thong, Stephanie Atkins, Leah Romero

Community Outreach & Communications



**This year, our
Communications &
Development
strategies reached
more people than
ever!**

Our Entire Team Consists of Champions

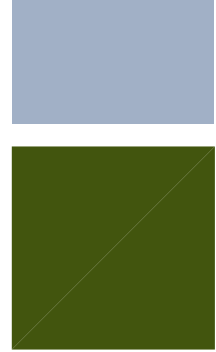
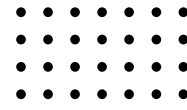
Community is a cornerstone value of San Luis Valley Behavioral Health Group, and our entire staff works hard to bring knowledge of our services to every corner of the SLV.

- Attended over 35 community events.
- Expanded social media presence with targeted campaigns.
- Hosted Chalk the Walk for Mental Health, Mindful Walk and Talks, and multiple pop-up sessions.
- Shared client and staff stories that inspired community engagement and encouraged help-seeking behavior.

Sponsorships: Investing in Our Community

Alamosa Pride Fest	\$100.00
Oktobrufest	\$200.00
Starry Night Ball	\$500.00
Stephanie Miner	\$1,000.00
Sacred Heart Church Bazaar Gift Card	\$50.00
Go Swim	\$1,000.00
Grizzly Club	\$1,500.00
Center Viking Youth Club	\$500.00
Share the Magic	\$2,000.00
Rio Frio Ice Festival	\$700.00
Sandhill Crane (Monte Vista Chamber)	\$200.00
SDC National Heritage Block Party	\$100.00
Habitat for Humankind - Build a Bike	\$100.00
Mercadillo Farm Park	\$100.00
Alamosa Chamber Café Gift Card Donation	\$50.00
Total:	\$8,050.00

The Strength Behind the Care



At the heart of our mission is a team of dedicated clinical supervisors who provide support, guidance, and leadership across all of our programs.

Collectively, they ensure the highest standards of care by mentoring clinicians, modeling best practices, and fostering a culture of growth and compassion.

This year, our supervisors:

Supported more than 55 clinical staff across multiple service areas.

Helped navigate complex cases and offered hundreds of hours of direct consultation and guidance.

Supervised 13 interns and new professionals, preparing the next generation of behavioral health providers.

Contributed a combined 71 years of clinical experience at our organization.

Their leadership not only strengthens our staff, but also extends directly to the thousands of clients and families we serve each year.



“We are committed to balancing the mission of service with the care of our workforce - collaborating, adapting, and supporting one another through mindful leadership .”

– Cynthia Stone and Jamie Bogner

Financials



Total Revenue
\$17,164,317

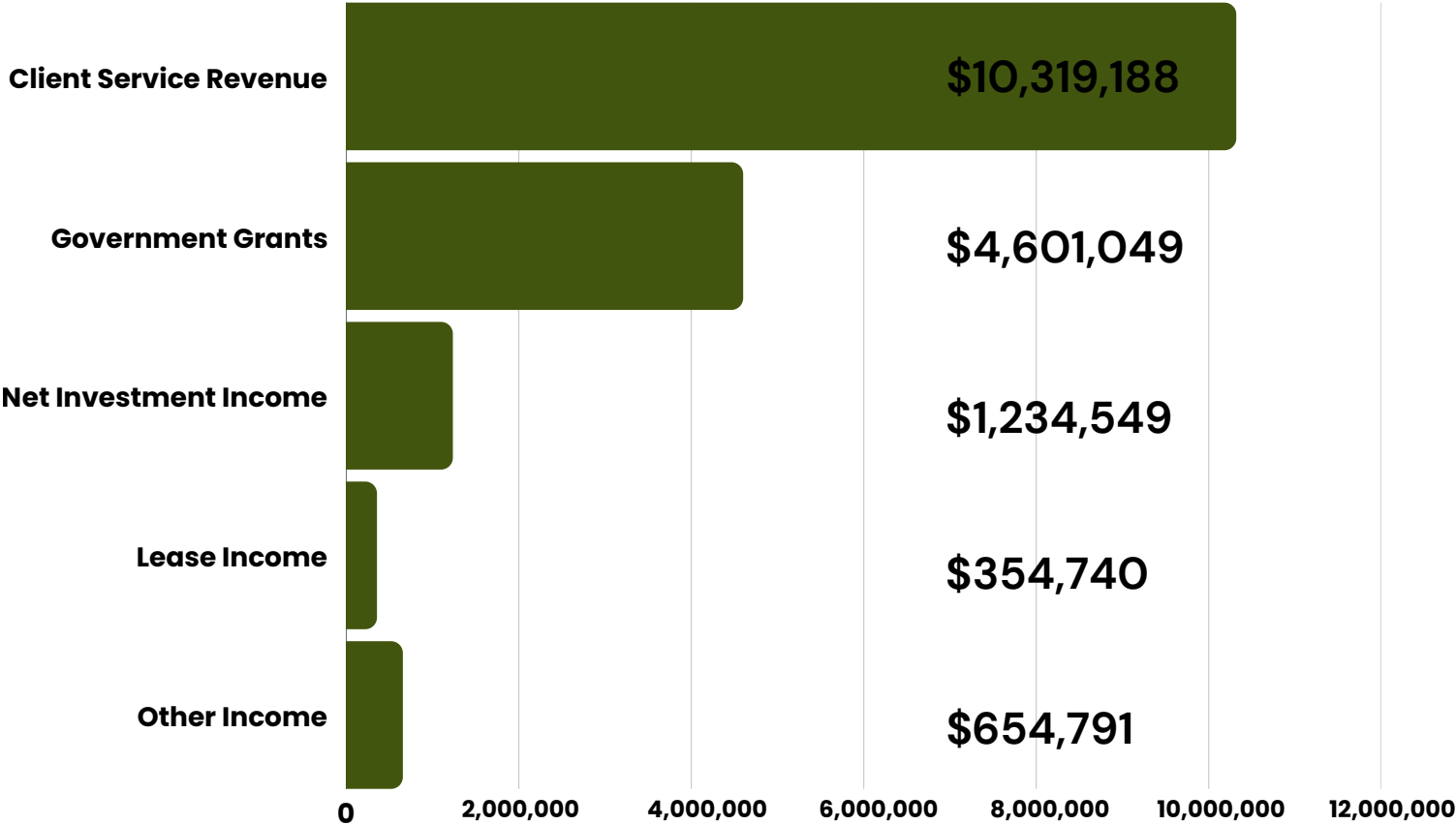
Total Expenses
\$15,701,962

Total Program
Expenses
\$12,175,869

Total Expenses by Category

- Salaries and Wages - \$9,584,904
- Employee Benefits - \$2,165,178
- Payroll Taxes - \$727,052
- Information Technology - \$851,021
- Occupancy - \$597,041
- Depreciation and Amortization - \$525,878
- Travel - \$259,930
- Licenses, Fees and Dues - \$234,692
- Purchased Services - \$166,335
- Office - \$129,264
- Conferences, Trainings, and Meetings - \$121,807
- Other Operating Expenses - \$338,860

Total Revenue by Category





Board of Directors Report

Message from Board Chair Patrick Stanford:

This fiscal year, SLVBHG demonstrated how a community-based behavioral health provider can lead with compassion, innovation, and accountability. Our programs reached every corner of the Valley, our partnerships deepened, and our vision expanded. The Board remains committed to ensuring SLVBHG continues to be a trusted, stable presence for years to come.



Dedicated to Hope,
Healing, and Recovery

2025 ANNUAL REPORT

The team behind the
service outcomes





San Luis Valley

Behavioral Health Group

Dedicated to Hope, Healing, and Recovery

SLVBHG FY 2026 Quarter 1 Strategic Plan Update

Our strategic plan emphasizes expanding behavioral health services throughout the San Luis Valley, carefully aligning with changing community needs and Colorado Behavioral Health Administration priorities. By focusing on improving access, quality, and innovation, we're positioning SLVBHG for lasting impact.

Organizational Overview & Mission

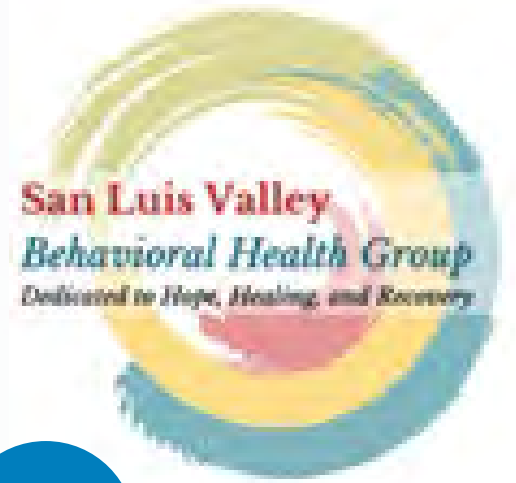
SLVBHG proudly served **3,664 individuals annually** across our network of 11 locations throughout the San Luis Valley in FY 2025.

- To remain a Comprehensive Provider
- To become a Certified Community Behavioral Health Clinic
- To become diversified, data -informed with defined OKRs/KPIs
- To develop a comprehensive plan to attract and sustain workforce talent and be recognized as an employer of choice
- Develop strong working relationships/partnerships with new RAE and BHASO



Our mission: To enrich lives, promote wellness, and respect human dignity through accessible, high -quality behavioral health services.

FY 2025 Strategic Priorities



1

Comprehensive SafetyNet provider

As part of our ongoing commitment to excellence, we continue to take deliberate steps to remain in good standing as a Comprehensive Safety Net Provider in Colorado. We are actively aligning with Behavioral Health Administration (BHA) requirements through enhanced quality assurance, strengthened clinical documentation practices, and improved data integrity measures.

2

Workforce talent and recognized as an employer of choice – our next initiative

Our focus on retention and employee engagement supports a culture of growth and well-being. These efforts ensure a skilled, supported team ready to meet our community's evolving behavioral health needs.

3

Prioritizing relationship-building and shared planning

Our leadership team is closely monitoring state guidance and engaging in regular communication with oversight entities to ensure compliance and readiness for upcoming audits and reporting transitions. These efforts reflect our shared commitment to transparency, fiscal responsibility, and sustaining the trust placed in us as a vital community resource for behavioral health services across the San Luis Valley.

Become a Certified Community Behavioral Health Clinic



- **Mobile Coverage**

Innovation for continued Mobile MAT Unit will traverse the entire 8,000 square mile San Luis Valley region, reaching isolated communities previously underserved.

- **Telehealth Access**

Implementation of user-friendly Doxy.me platform reduces transportation barriers for rural clients, increasing appointment completion rates.

- **Integrated Treatment**

Enhanced focus on treating co-occurring mental health and substance use disorders simultaneously for improved outcomes.

Diversified, Data-informed with defined OKRs/KPIs



Building a Data-Informed Culture

Focus on investing in data systems that allow

Tracking and reporting.

Train staff and leaders to use data for decision-making, and compliance.

Incorporate data dashboards into leadership and board reviews



Strengthening Communication and Accountability

Cascade OKR/KPIs from leadership to team level so everyone understands their role in achieving organizational goals. Hold regular progress reviews and share outcomes based on date with staff and the board



Aligning Data and People Strategies

Link workforce goals with performance outcomes

Use data to identify workforce needs and gaps, predict needs, and identify where technology can lead to efficiency.





Innovation & Technology Integration

Enhanced Telehealth Platform

Fully implementing secure Doxy.me platform with features including:

- Virtual waiting rooms
- Group therapy capabilities
- Mobile device compatibility
- Electronic documentation
- Jotforms

Data-Driven Outcomes

Adopting sophisticated analytics to:

- Track treatment effectiveness
- Identify service gaps
- Support evidence-based decisions
- Report meaningful outcomes

Emerging Technologies

Exploring innovative solutions including:

- Digital therapeutic applications
- Remote monitoring tools
- AI-assisted tools
- Attending Netsmart Conference and Behavioral Health Technology Conference

Funding & Sustainability Outlook



State Funding Alignment

Synchronizing our strategic initiatives with Colorado Department of Human Services funding cycles to maximize resource allocation.



Grant Opportunities

Pursuing targeted state and federal grants specifically for sustainability innovation.



Resource Planning

Implementing comprehensive financial modeling to ensure sustainable growth while maintaining service quality and workforce stability.



FINANCIAL REPORT

SEPTEMBER 2025

SAN LUIS VALLEY BEHAVIORAL HEALTH GROUP
CONSOLIDATED BALANCE SHEET
SEPTEMBER 30, 2025

	Community Mental Health Center	Asset Management Corporation	Intercompany Eliminations	Consolidated San Luis Valley Behavioral Health Group
ASSETS				
Cash	4,218,795	\$ 856,001	\$ -	\$ 5,074,796
Investments	5,414,978	9,990,715	-	15,405,693
Grants Receivable	278,069	-	-	278,069
Interest Receivable	-	4,697	-	4,697
Intercompany Receivable	-	118,863	(118,863)	-
Prepaid Expenses and Other Assets	373,411	-	-	373,411
Notes Receivable	-	983,381	-	983,381
Investment in Health Colorado, Inc.	1,085,366	-	-	1,085,366
Right-of-Use Assets, net	-	386,632	-	386,632
Property and Equipment, net	86,364	6,722,462	-	6,808,826
TOTAL ASSETS	\$ 11,456,983	\$ 19,062,751	\$ (118,863)	\$ 30,400,871
LIABILITIES				
Accounts Payable	153,850	850	-	154,700
Accrued Payroll and Employee Benefits	971,711	-	-	971,711
Due to Health Colorado	80,000	-	-	80,000
Due to Rocky Mountain Health Plans	120,000	-	-	120,000
Leases Payable	-	373,813	-	373,813
Intercompany Payable	118,863	-	(118,863)	-
Security Deposits	15,078	9,653	-	24,731
Deferred Revenue	1,004	4,448	-	5,452
TOTAL LIABILITIES	1,460,506	388,764	(118,863)	1,730,407
NET ASSETS	9,996,477	18,673,987	-	28,670,464
TOTAL LIABILITIES AND NET ASSETS	\$ 11,456,983	\$ 19,062,751	\$ (118,863)	\$ 30,400,871

**San Luis Valley Behavioral Health Group
San Luis Valley Community Mental Health Center
Balance Sheet
September 30, 2025**

	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Checking - CMHC Operating	\$3,876,847.78
1015 - Cash in Bank - Credit Cards	\$459.28
1020 - Cash in Bank - Cafe	\$53,773.00
1080 - Money Market - SLV Federal Bank	\$286,604.56
1095 - Petty Cash	\$1,110.00
Total Bank	\$4,218,794.62
Accounts Receivable	
1210 - Accounts Receivable - Grants	\$278,069.16
Total Accounts Receivable	\$278,069.16
Other Current Asset	
1300 - Prepaid Expenses	
1310 - Prepaid Expenses - Insurance	\$133,858.28
1320 - Prepaid Expenses - Licenses	\$239,552.51
Total - 1300 - Prepaid Expenses	\$373,410.79
Total Other Current Asset	\$373,410.79
Total Current Assets	\$4,870,274.57
Fixed Assets	
1500 - Property and Equipment	
1530 - Furniture and Equipment	\$100,505.84
Total - 1500 - Property and Equipment	\$100,505.84
1600 - Accumulated Depreciation and Amortization	(\$14,142.10)
Total Fixed Assets	\$86,363.74
Other Assets	
1800 - Investments	
1810 - Investments - LPL Financial - CMHC	\$5,414,978.14
1850 - Investment in Health Colorado Inc.	\$1,085,366.00
Total - 1800 - Investments	\$6,500,344.14
Total Other Assets	\$6,500,344.14
Total ASSETS	\$11,456,982.45
Liabilities & Equity	
Current Liabilities	
Accounts Payable	\$153,943.68
Other Current Liability	
2050 - Accrued Expenses	(\$93.91)
2110 - Accrued Payroll	\$153,757.69
2120 - Accrued Vacation Payable	\$513,723.13
2300 - Employee Benefits Payable	\$304,229.88
2501 - Due to Health Colorado Inc	\$80,000.00
2502 - Due to Rocky Mountain Health Plans	\$120,000.00
2590 - Deferred Revenue	\$1,004.00
2595 - Intercompany Payable	\$118,863.11
Total Other Current Liability	\$1,291,483.90
Total Current Liabilities	\$1,445,427.58
Long Term Liabilities	
2710 - Rental Security Deposits	\$15,078.00
Total Long Term Liabilities	\$15,078.00
Equity	
Retained Earnings	\$10,288,386.14
Net Income	(\$291,909.27)
Total Equity	\$9,996,476.87
Total Liabilities & Equity	\$11,456,982.45

San Luis Valley Behavioral Health Group
San Luis Valley Asset Management Corporation
Balance Sheet
September 30, 2025

	AMOUNT
ASSETS	
Current Assets	
Bank	
1010 - Checking - Asset Management Operating	\$856,000.60
Total Bank	\$856,000.60
Accounts Receivable	
1250 - Accounts Receivable - Other	\$4,697.34
Total Accounts Receivable	\$4,697.34
Other Current Asset	
1395 - Intercompany Receivable	\$118,863.11
Total Other Current Asset	\$118,863.11
Total Current Assets	\$979,561.05
Fixed Assets	
1500 - Property and Equipment	
1510 - Land	\$1,100,660.11
1520 - Buildings and Improvements	\$10,045,457.43
1540 - Vehicles	\$171,282.04
1550 - Right-of-Use Assets - Vehicles	\$588,445.36
1590 - Work In Progress	\$31,103.00
Total - 1500 - Property and Equipment	\$11,936,947.94
1600 - Accumulated Depreciation and Amortization	(\$4,827,853.70)
Total Fixed Assets	\$7,109,094.24
Other Assets	
1700 - Notes Receivable	
1710 - Note Receivable - ATC (2017 / 2257 Lava Lane)	\$838,565.29
1720 - Note Receivable - ATC (2261 Lava Lane)	\$144,815.51
Total - 1700 - Notes Receivable	\$983,380.80
1800 - Investments	
1820 - Investments - LPL Financial - Asset Management	\$9,990,714.75
Total - 1800 - Investments	\$9,990,714.75
Total Other Assets	\$10,974,095.55
Total ASSETS	\$19,062,750.84
Liabilities & Equity	
Current Liabilities	
Accounts Payable	\$850.28
Other Current Liability	
2590 - Deferred Revenue	\$4,447.96
Total Other Current Liability	\$4,447.96
Total Current Liabilities	\$5,298.24
Long Term Liabilities	
2710 - Rental Security Deposits	\$9,653.00
2750 - Lease Liability - Vehicles	\$373,812.88
Total Long Term Liabilities	\$383,465.88
Equity	
Retained Earnings	\$17,912,783.04
Net Income	\$761,203.68
Total Equity	\$18,673,986.72
Total Liabilities & Equity	\$19,062,750.84

SAN LUIS VALLEY BEHAVIORAL HEALTH GROUP
CONSOLIDATED STATEMENT OF OPERATIONS
SEPTEMBER 30, 2025

	Community Mental Health Center	Asset Management Corporation	Intercompany Eliminations	Consolidated San Luis Valley Behavioral Health Group
REVENUE				
Client Service Revenue	\$ 2,901,206	\$ -	\$ -	\$ 2,901,206
Government Grant Income	660,863	-	-	660,863
Lease Income	45,389	169,900	(127,874)	87,415
Other Operating Income	66,288	-	-	66,288
Total REVENUE	3,673,746	169,900	(127,874)	3,715,772
EXPENSES				
Salaries and Wages	2,366,478	-	-	2,366,478
Payroll Taxes	177,963	-	-	177,963
Employee Benefits	641,446	-	-	641,446
Advertising and Marketing	10,677	-	-	10,677
Client	12,129	-	-	12,129
Conferences, Trainings and Meetings	41,430	-	-	41,430
Depreciation and Amortization	5,025	124,263	-	129,288
Information Technology	243,151	-	-	243,151
Liability Insurance	26,670	-	-	26,670
Licenses, Fees and Dues	71,409	-	-	71,409
Occupancy	212,031	11,780	(77,672)	146,139
Office Expense	32,234	-	-	32,234
Professional Fees	71,730	-	-	71,730
Travel	28,997	-	-	28,997
Vehicle Expense	83,113	-	(50,202)	32,911
Other Operating Expense	2,963	12,402	-	15,365
Total EXPENSES	4,027,446	148,445	(127,874)	4,048,017
OPERATING INCOME (LOSS)	(353,700)	21,455	-	(332,245)
OTHER INCOME (EXPENSE)				
Interest Income	1,423	18,505	-	19,928
Investment Income	46,661	89,177	-	135,838
Gain on Disposal of Property & Equipment	-	10,039	-	10,039
Unrealized Gain (Loss) on Investments	13,708	622,028	-	635,736
Total OTHER INCOME (EXPENSE)	61,792	739,749	-	801,541
CHANGE IN NET ASSETS	(291,908)	761,204	-	469,296
NET ASSETS - 06/30/2025	10,288,386	17,912,782	-	28,201,168
NET ASSETS - 09/30/2025	\$ 9,996,478	\$ 18,673,986	\$ -	\$ 28,670,464

**San Luis Valley Behavioral Health Group
San Luis Valley Community Mental Health Center
Budget vs. Actual Statement of Operations
Current Month - September 2025**

	AMOUNT	BUDGET AMOUNT	AMOUNT OVER BUDGET	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Client Service Revenue	\$944,946.75	\$969,300.00	(\$24,353.25)	97.49%
4200 - Government Grant Income	\$194,342.15	\$209,750.00	(\$15,407.85)	92.65%
4400 - Contributions and Other Grant Income	\$39,860.97	\$2,500.00	\$37,360.97	1,594.44%
4700 - Rental Income	\$15,260.00	\$16,500.00	(\$1,240.00)	92.48%
4900 - Other Operating Income	\$45,170.51	\$6,250.00	\$38,920.51	722.73%
Total - Income	\$1,239,580.38	\$1,204,300.00	\$35,280.38	102.93%
Gross Profit	\$1,239,580.38	\$1,204,300.00	\$35,280.38	102.93%
Expense				
6200 - Salaries and Wages	\$747,046.73	\$782,000.00	(\$34,953.27)	95.53%
6300 - Payroll Taxes	\$56,034.81	\$61,615.00	(\$5,580.19)	90.94%
6400 - Employee Benefits	\$201,136.38	\$190,195.00	\$10,941.38	105.75%
7000 - Advertising and Marketing	\$4,155.19	\$3,050.00	\$1,105.19	136.24%
7050 - Client	\$1,863.72	\$4,500.00	(\$2,636.28)	41.42%
7100 - Conferences, Trainings and Meetings	\$8,005.65	\$7,750.00	\$255.65	103.30%
7150 - Depreciation and Amortization	\$1,675.10	\$2,500.00	(\$824.90)	67.00%
7200 - Information Technology	\$90,617.32	\$66,375.00	\$24,242.32	136.52%
7250 - Liability Insurance	\$8,766.33	\$9,500.00	(\$733.67)	92.28%
7300 - Licenses, Fees and Dues	\$37,659.31	\$11,350.00	\$26,309.31	331.80%
7400 - Occupancy	\$85,526.67	\$67,775.00	\$17,751.67	126.19%
7500 - Office Expense	\$7,752.10	\$11,450.00	(\$3,697.90)	67.70%
7650 - Professional Fees	\$37,277.54	\$4,350.00	\$32,927.54	856.95%
7700 - Travel	\$14,385.82	\$9,475.00	\$4,910.82	151.83%
7800 - Vehicle Expense	\$27,930.92	\$36,450.00	(\$8,519.08)	76.63%
7900 - Other Operating Expense	(\$548.95)	\$1,350.00	(\$1,898.95)	-40.66%
Total - Expense	\$1,329,284.64	\$1,269,685.00	\$59,599.64	104.69%
Net Ordinary Income	(\$89,704.26)	(\$65,385.00)	(\$24,319.26)	137.19%
Other Income and Expenses				
Other Income				
9000 - Other Income				
9010 - Interest Income	\$522.49	\$0.00	\$522.49	0.00%
9020 - Investment Income	\$18,606.01	\$15,500.00	\$3,106.01	120.04%
9030 - Unrealized Gain (Loss) on Investments	\$4,979.93	\$0.00	\$4,979.93	0.00%
Total - 9000 - Other Income	\$24,108.43	\$15,500.00	\$8,608.43	155.54%
Total - Other Income	\$24,108.43	\$15,500.00	\$8,608.43	155.54%
Net Other Income	\$24,108.43	\$15,500.00	\$8,608.43	155.54%
Net Income	(\$65,595.83)	(\$49,885.00)	(\$15,710.83)	131.49%

**San Luis Valley Behavioral Health Group
San Luis Valley Community Mental Health Center
Budget vs. Actual Statement of Operations
Fiscal Year-To-Date September 30, 2025**

	AMOUNT	BUDGET AMOUNT	AMOUNT OVER BUDGET	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Client Service Revenue	\$2,901,206.06	\$2,907,900.00	(\$6,693.94)	99.77%
4200 - Government Grant Income	\$621,001.74	\$879,250.00	(\$258,248.26)	70.63%
4400 - Contributions and Other Grant Income	\$39,860.97	\$7,500.00	\$32,360.97	531.48%
4700 - Rental Income	\$45,388.50	\$49,500.00	(\$4,111.50)	91.69%
4900 - Other Operating Income	\$66,288.43	\$23,750.00	\$42,538.43	279.11%
Total - Income	\$3,673,745.70	\$3,867,900.00	(\$194,154.30)	94.98%
Gross Profit	\$3,673,745.70	\$3,867,900.00	(\$194,154.30)	94.98%
Expense				
6200 - Salaries and Wages	\$2,366,478.01	\$2,346,000.00	\$20,478.01	100.87%
6300 - Payroll Taxes	\$177,963.11	\$184,845.00	(\$6,881.89)	96.28%
6400 - Employee Benefits	\$641,445.82	\$583,080.00	\$58,365.82	110.01%
7000 - Advertising and Marketing	\$10,677.14	\$10,550.00	\$127.14	101.21%
7050 - Client	\$12,129.36	\$13,500.00	(\$1,370.64)	89.85%
7100 - Conferences, Trainings and Meetings	\$41,429.82	\$43,750.00	(\$2,320.18)	94.70%
7150 - Depreciation and Amortization	\$5,025.30	\$7,500.00	(\$2,474.70)	67.00%
7200 - Information Technology	\$243,150.51	\$242,625.00	\$525.51	100.22%
7250 - Liability Insurance	\$26,669.99	\$34,500.00	(\$7,830.01)	77.30%
7300 - Licenses, Fees and Dues	\$71,409.36	\$84,550.00	(\$13,140.64)	84.46%
7400 - Occupancy	\$212,031.09	\$205,125.00	\$6,906.09	103.37%
7500 - Office Expense	\$32,234.30	\$35,600.00	(\$3,365.70)	90.55%
7650 - Professional Fees	\$71,729.54	\$81,550.00	(\$9,820.46)	87.96%
7700 - Travel	\$28,997.30	\$28,425.00	\$572.30	102.01%
7800 - Vehicle Expense	\$83,113.33	\$101,550.00	(\$18,436.67)	81.84%
7900 - Other Operating Expense	\$2,963.36	\$4,050.00	(\$1,086.64)	73.17%
Total - Expense	\$4,027,447.34	\$4,007,200.00	\$20,247.34	100.51%
Net Ordinary Income	(\$353,701.64)	(\$139,300.00)	(\$214,401.64)	253.91%
Other Income and Expenses				
Other Income				
9000 - Other Income				
9010 - Interest Income	\$1,423.17	\$0.00	\$1,423.17	0.00%
9020 - Investment Income	\$46,660.73	\$46,500.00	\$160.73	100.35%
9030 - Unrealized Gain (Loss) on Investments	\$13,708.47	\$0.00	\$13,708.47	0.00%
Total - 9000 - Other Income	\$61,792.37	\$46,500.00	\$15,292.37	132.89%
Total - Other Income	\$61,792.37	\$46,500.00	\$15,292.37	132.89%
Net Other Income	\$61,792.37	\$46,500.00	\$15,292.37	132.89%
Net Income	(\$291,909.27)	(\$92,800.00)	(\$199,109.27)	314.56%

**San Luis Valley Behavioral Health Group
San Luis Valley Asset Management Corporation
Budget vs. Actual Statement of Operations
Current Month - September 2025**

	AMOUNT	BUDGET AMOUNT	AMOUNT OVER BUDGET	% OF BUDGET
Ordinary Income/Expense				
Income				
4700 - Rental Income	\$58,079.40	\$55,500.00	\$2,579.40	104.65%
Total - Income	\$58,079.40	\$55,500.00	\$2,579.40	104.65%
Gross Profit	\$58,079.40	\$55,500.00	\$2,579.40	104.65%
Expense				
7150 - Depreciation and Amortization	\$41,951.39	\$42,750.00	(\$798.61)	98.13%
7400 - Occupancy	\$2,157.96	\$5,000.00	(\$2,842.04)	43.16%
7900 - Other Operating Expense	\$4,049.78	\$3,750.00	\$299.78	107.99%
Total - Expense	\$48,159.13	\$51,500.00	(\$3,340.87)	93.51%
Net Ordinary Income	\$9,920.27	\$4,000.00	\$5,920.27	248.01%
Other Income and Expenses				
Other Income				
9000 - Other Income				
9010 - Interest Income	\$4,555.03	\$4,500.00	\$55.03	101.22%
9020 - Investment Income	\$46,297.26	\$25,000.00	\$21,297.26	185.19%
9030 - Unrealized Gain (Loss) on Investments	\$251,893.15	\$0.00	\$251,893.15	0.00%
Total - 9000 - Other Income	\$302,745.44	\$29,500.00	\$273,245.44	1,026.26%
Total - Other Income	\$302,745.44	\$29,500.00	\$273,245.44	1,026.26%
Net Other Income	\$302,745.44	\$29,500.00	\$273,245.44	1,026.26%
Net Income	\$312,665.71	\$33,500.00	\$279,165.71	933.33%

**San Luis Valley Behavioral Health Group
San Luis Valley Asset Management Corporation
Budget vs. Actual Statement of Operations
Fiscal Year-To-Date September 30, 2025**

	AMOUNT	BUDGET AMOUNT	AMOUNT OVER BUDGET	% OF BUDGET
Ordinary Income/Expense				
Income				
4700 - Rental Income	\$169,900.02	\$166,500.00	\$3,400.02	102.04%
Total - Income	\$169,900.02	\$166,500.00	\$3,400.02	102.04%
Gross Profit	\$169,900.02	\$166,500.00	\$3,400.02	102.04%
Expense				
7150 - Depreciation and Amortization	\$124,263.22	\$128,250.00	(\$3,986.78)	96.89%
7400 - Occupancy	\$11,779.78	\$21,000.00	(\$9,220.22)	56.09%
7900 - Other Operating Expense	\$12,402.11	\$11,250.00	\$1,152.11	110.24%
Total - Expense	\$148,445.11	\$160,500.00	(\$12,054.89)	92.49%
Net Ordinary Income	\$21,454.91	\$6,000.00	\$15,454.91	357.58%
Other Income and Expenses				
Other Income				
9000 - Other Income				
9010 - Interest Income	\$18,505.19	\$13,500.00	\$5,005.19	137.08%
9020 - Investment Income	\$89,176.47	\$75,000.00	\$14,176.47	118.90%
9030 - Unrealized Gain (Loss) on Investments	\$622,028.11	\$0.00	\$622,028.11	0.00%
9100 - Gain (Loss) on Disposal of Property and Equipment	\$10,039.00	\$0.00	\$10,039.00	0.00%
Total - 9000 - Other Income	\$739,748.77	\$88,500.00	\$651,248.77	835.87%
Total - Other Income	\$739,748.77	\$88,500.00	\$651,248.77	835.87%
Net Other Income	\$739,748.77	\$88,500.00	\$651,248.77	835.87%
Net Income	\$761,203.68	\$94,500.00	\$666,703.68	805.51%

San Luis Valley Behavioral Health Group
Cash Position

	10/21/25	09/24/25	Variance	06/30/25	03/31/25	12/31/24	09/30/24
Asset Mgmt Corp - Operating Cash	\$ 820,077	\$ 837,710	\$ (17,633)	\$ 883,349	\$ 1,161,222	\$ 1,466,209	\$ 1,395,331
CMHC - Operating Cash	\$ 3,270,701	\$ 4,119,632	\$ (848,931)	\$ 3,193,411	\$ 3,377,977	\$ 3,442,412	\$ 3,967,946
Total Operating Cash	\$ 4,090,778	\$ 4,957,342	\$ (866,564)	\$ 4,076,760	\$ 4,539,199	\$ 4,908,621	\$ 5,363,277
SLV Federal Money Market Account	\$ 286,605	\$ 286,510	\$ 95	\$ 286,316	\$ 286,030	\$ 285,749	\$ 285,461
LPL Financial - Asset Mgmt Corp	\$ 9,990,715	\$ 9,692,524	\$ 298,191	\$ 9,279,510	\$ 8,212,028	\$ 7,593,728	\$ 7,655,412
LPL Financial - CMHC	\$ 5,414,978	\$ 5,391,392	\$ 23,586	\$ 5,354,609	\$ 5,289,974	\$ 5,255,882	\$ 5,185,343
Total Long-Term Investments	\$ 15,692,298	\$ 15,370,426	\$ 321,872	\$ 14,920,435	\$ 13,788,032	\$ 13,135,359	\$ 13,126,216
Total Operating Cash / LT Investments	\$ 19,783,076	\$ 20,327,768	\$ (544,692)	\$ 18,997,195	\$ 18,327,231	\$ 18,043,980	\$ 18,489,493
Notes Receivable - The Carrigan Group (Advantage Treatment Center)							
	Loan #1	Loan #2	Total				
Loan Amount	\$ 1,000,000	\$ 350,000	\$ 1,350,000	10 year term 06/01/2023 - 06/01/2033			
Interest Received	\$ 118,565	\$ 34,816	\$ 153,381	Interest Rate - 5.5%			
Principal Received	\$ 161,435	\$ 205,184	\$ 366,619				
Total Received	\$ 280,000	\$ 240,000	\$ 520,000				
Outstanding Loan Balance	\$ 838,565	\$ 144,816	\$ 983,381				

CEO Report

October 2025 Board Meeting

- * HCPF – Health Care Policy and Finance
- * BHA – Behavioral Health Administration
- *BHASO – Behavioral Health Administrative Service Organization
- *RAE – Regional Accountable Entity
- *CSNP – Comprehensive Safety Net Provider

Health Colorado Inc. (HCI):

Michelle Vanhossler, Briana Duffy (Carelton Behavioral Health (CBH)), and I met with HCPF to discuss their request and how to fulfill it. Their request concerned the need to sustain oversight after the contract ends. We continue to meet regarding this request. After discussing with their attorney, Carelon is more open to the request; however, the HCI board still expresses concerns.

I am meeting biweekly with Carelon and HCPF.

I also meet biweekly with Carelon staff.

Health Care Policy and Finance (HCPF):

HCPF October Provider Association Newsletter- This month's newsletter focuses on federal and state policy changes shaping Colorado's Medicaid program. The Department of Health Care Policy & Financing (HCPF) is preparing its application for the \$50 billion Rural Health Transformation Program (H.R. 1), which will fund rural health system innovation from FFY 2026 to 2030

HCPF At a Glance October 2025. H.R. 1 also introduces new Medicaid rules, including six-month eligibility redeterminations and work requirements for able-bodied expansion adults starting in 2027, posing risks of coverage loss and administrative strain. HCPF plans to mitigate these through automation, stakeholder engagement, and flexibilities like self-attestation and state-defined exemptions. Additional updates include a \$4.6 million Reentry Planning Grant to expand Medicaid services pre-release for justice-involved individuals, enhancements to the Prescriber Tool integrated with EHR systems, and ongoing Certified Community Behavioral Health Clinic (CCBHC) stakeholder meetings to strengthen behavioral health care access statewide

Behavioral Health Administration (BHA):

BHA continues to make plans to manage the potential impacts of the state's budget shortfalls in addition to HR1. They want to prioritize working with partners to identify legislative priorities and alignment. They are focusing on what needs to be in place in three years, calling for agencies to look for the "Opportunity to be radically different and still be in servitude."

BHA has developed four bold goals that will be our focus between now and December 2026:

- Increase access to behavioral health services.
- Bolster and expand our statewide behavioral health crisis system.
- Enhance prevention and upstream support strategies for children and youth.
- Streamline behavioral health integration with Colorado’s criminal justice system.

Colorado Behavioral Health Council (CBHC):

The efforts to improve the working relationship between the CBHC Executive Committee and the Behavioral Health Administration (BHA) marked a turning point in tone this month — more candid, collaborative, and (finally) grounded in mutual acknowledgment that the system needs stabilization before it can keep reforming itself into exhaustion. Commissioner Smith, Kara, and CBHC leadership aligned around using the upcoming strategy session to frame shared purpose, define the core problems to solve (rather than leaping to fixes), and clarify which levers — statutory, regulatory, or contractual — can realistically be pulled in the short and long term.

Key Themes & Discussion Points:

1. Framing the Conversation: Kara outlined a “lean-informed” approach: defining the problem, identifying top risks, and mapping potential solutions by effort and impact.

Commissioner Smith requested time for BHA to present its “path forward” and internal roadmap ahead of a new administration, including updates on civil commitment reform, ASAM (American Society of Addiction Medicine) 4.0 rulemaking, and broader system transformation efforts.

2. Courage and Alignment: CBHC Executive committee called for “courage to say things we’ve said in smaller rooms” — to modernize outdated ideas and resist catering to “the loudest voices.”

Emphasizing partnership and realism: indigent care needs are growing, and the system must reimagine how to sustain access with fewer resources. The collective group framed this courage as essential to re-centering on the just cause of behavioral health reform rather than bureaucratic churn.

3. Priority Topics Emerging: No Eject / No Reject: All agreed philosophically with the principle, but flagged that current funding models make it unworkable. Stressing the issue isn’t the expectation — the financing architecture penalizes access and efficiency.

Sponsorships:

Sacred Heart Church

Previous sponsorships:

Tu Casa Starry Night Ball
Boys and Girls Club of SLV

Leadership Connections/Meetings:

- | | |
|---------------------------------|----------------------------|
| • SCHN | • HCPF/CBHC Meeting |
| • SYCARE | • Region 1 Meeting |
| SLV Region 18 Opioid Governance | • BHA/CBHC meeting |
| • Patrick Gordon | • CBHC Executive Committee |

Upcoming Time Off/Travel:

November 10th – 14th Behavioral Health Tech Conference

November 24th – 28th Off



San Luis Valley Behavioral Health Group Marketing Plan

Executive Summary

San Luis Valley Behavioral Health Group (SLVBHG) is a nonprofit, community mental health center (historically) that has served the residents of southern Colorado since 1970. In 2025, we became a Comprehensive Safety Net Provider (CSNP) serving Colorado's six-county San Luis Valley, one of the state's most rural and economically underserved regions. SLVBHG has delivered high-quality, culturally responsive behavioral health services across Alamosa, Conejos, Costilla, Mineral, Rio Grande, and Saguache counties. Our Vision is to provide hope, healing, and recovery by meeting people where they are with compassion, clinical excellence, and deep community connection.

As the sole safety-net behavioral health provider in the Valley, SLVBHG offers a continuum of care that includes outpatient therapy, substance use treatment, crisis response, early childhood and family services, peer support, care coordination, and community-based prevention programs. Many of our 150+ staff live in the same communities we serve and reflect the region's rich cultural heritage, including our large Hispanic and Spanish-speaking populations. We specialize in serving the underinsured, uninsured, and those facing complex barriers to care. We often support individuals through non-billable yet essential services like warm handoffs, Medicaid navigation, and follow-up after a crisis. Our trusted reputation, multi-agency partnerships, and commitment to innovation position us to lead meaningful, sustainable improvements in behavioral health access and outcomes across the San Luis Valley. With a strong Mission to provide access to quality behavioral health services and improve the quality of life in the San Luis Valley. The organization serves a geographically isolated and economically challenged population and has evolved into a critical community resource with over 155 employees across various departments.

This marketing plan begins with a comprehensive internal and external situation analysis, exploring the organization's operations, services, customer demographics, trade area, and financial profile. Key findings from the external environment—including changes in Medicaid policy, telehealth regulations, and behavioral health reforms are identified as major strategic factors. The plan analyzes SLVBHG's strengths, such as its strong community presence, holistic services, mobile outreach, and dedicated staff. However, challenges like funding dependence on Medicaid, rural accessibility, workforce shortage, and recruitment must be addressed. Competitive analysis shows other regional providers like SLV Health and Valley Wide Health Systems offer similar services, but SLVBHG stands out due to its holistic care model and cultural responsiveness.

The plan outlines actionable marketing recommendations, including stronger community engagement strategies, expanded use of telehealth, partnerships with local employers and schools, and targeted messaging highlighting the organization's unique value. An emphasis on



storytelling, case-based outreach, and service accessibility is recommended to build awareness, trust, and utilization. The plan aims to guide SLVBHG in sustaining and expanding its impact through innovative, ethical, and inclusive marketing approaches tailored to the valley's unique needs.

Introduction

This marketing plan aims to develop a strategic framework that will support San Luis Valley Behavioral Health Group (SLVBHG) in enhancing its community visibility, client engagement, and service delivery amid a rapidly evolving healthcare landscape. As a nonprofit comprehensive safety net provider with over five decades of service, SLVBHG is vital in providing behavioral health services to a highly diverse and rural population.

This plan is organized into several key sections. First, a situation analysis examines internal strengths, organizational operations, and external factors such as policy trends and market conditions. This is followed by a detailed description of SLVBHG's current services, client demographics, and financial overview. The plan then evaluates market competition and identifies both challenges and opportunities. Finally, strategic marketing recommendations are proposed to enhance community outreach, increase access to care, and ensure long-term sustainability.

This marketing plan aims to attract and retain clients and position SLVBHG as a forward-thinking leader in rural behavioral healthcare delivery.

SLVBHG situation analysis:

Internal Analysis

Organization Background

San Luis Valley Behavioral Health Group (SLVBHG) is a non-profit Comprehensive SafetyNet Provider in southern Colorado, founded in 1970 to address the lack of mental health services in the San Luis Valley. Providing a wide range of behavioral health services, including mental health and substance abuse treatment, to individuals of all ages and backgrounds, with a focus on accessibility and client-centered care. SLVBHG serves as a crucial resource, offering services at fixed locations and through a mobile health unit, to ensure access to care across the geographically diverse and often economically challenged region. We have grown from about 50 employees to 155 employees with departments in billing/patient accounts, leadership, human resources, information technology (IT), business intelligence (BI), customer service representatives, child-based service, nursing home services, outpatient services, teletherapy, medical records, credentialing, etc.



Our Mission

To provide access to quality behavioral health services that enrich lives and promote wellness. We are driven by a profound respect for human dignity and a desire to serve the underrepresented, the disenfranchised, and those who experience behavioral distress.

Our Vision

To improve the quality of life for the residents of the San Luis Valley.

Our Core Values

At SLVBHG, our core values represent who we are and what we believe

- **Excellent Services:** We believe people deserve excellence in the services we provide and utilize a holistic, preventative approach that supports people's lives, strengthens families, nurtures our youth, and empowers people.
- **Ethical Practices:** San Luis Valley Behavioral Health Group values integrity, honesty, responsibility, and people. We ensure individuals receive the highest level of services through our application of ethical practices.
- **Activism:** We stand on a legacy of activism that rests on a firm understanding that economic strength is the basis for self-determination. Therefore, we incorporate good business practices to ensure stability and continuity for our services. We are united by profound respect for human dignity, by a desire to serve the underrepresented, the disenfranchised, and those who suffer from mental distress.
- **Diversity:** We welcome diversity in staff and services; belief in working as a family and modeling community.
- **Innovation:** We are progressive pioneers that utilize change to find innovative methods of meeting the needs of people including making services accessible to people where they live.

Product / Service Description

24-Hour Mobile Crisis Intervention:

Evaluations for psychiatric hospitalizations, crisis intervention, and participation in school crisis teams.

Mi Esperanza Wellness Center:

Provides brief interventions without an appointment and helps individuals obtain ongoing treatment and care.

ACT/Intensive Case Management:



Assertive outreach, treatment, and skills training for adults with behavioral illness who are involved in the criminal justice system or need this level of care to avoid hospitalization.

Adolescent Case Management Services:

Services to assist youth with behavioral or emotional disturbances, substance abuse disorders, or developmental disabilities to transition to adulthood and independent living.

Counseling:

Outpatient individual, group, and family therapy for children, adolescents, and families.

Consultant/Education Services:

Speakers and trainers in behavioral health, addictions, substance abuse, and suicide prevention.

Consumer and Family Advocacy:

Education, support, and advocacy for individuals and family members. Opportunities for developing family and peer leadership to promote recovery in the Behavioral Health System and reduce stigma in the community.

Home Visiting Family Services:

In-home services for families with children at risk of out-of-home placement. Education, case management, and interagency collaboration. Includes services to enhance family resources, stability, and reunification after out-of-home placement or inpatient discharge.

Housing:

Subsidized housing and supportive services for low-income persons or families with a disability, serious behavioral illness, and chronic homelessness.

Mobile MAT:

Medication-assisted treatment (MAT) uses FDA-approved medications, in combination with counseling and behavioral therapies, to provide a “whole-patient” approach to the treatment of substance use disorders.

New Beginnings Wellness and Recovery:

Services to help individuals regain purpose, skills, training, and confidence, with the goal of rehabilitation. The treatment at New Beginnings is meaningful work, and the relationships and socialization happen continuously within the program.

Outpatient Addictions Recovery:



Substance abuse and addiction evaluation and treatment using individual, group, enhanced outpatient, Level I, and Level II protocols.

Parenting Classes:

Classes that teach positive skills and child development concepts to parents of children of all ages.

Psychiatric Services:

Psychiatric consultation for adults, adolescents, children, geriatric, and developmentally disabled individuals. Ongoing medication management. These services include telepsychiatry, as well as face-to-face appointments.

School/Head Start Services:

In-school services for individuals, groups, and families in most San Luis Valley school districts.

Genoa Pharmacy

Genoa is an on-site pharmacy that can fill all medications. They provide convenient pick-up and delivery options at no additional cost.

Existing market (San Luis Valley, Colorado)

Office Locations:

Clinic Locations and Hours of Operation		
Alamosa 8745 County Rd. 9 South Alamosa, CO 81101 Monday – Thursday 8am – 6:30pm Friday 8am – 5pm	Antonito* 915 Dahlia Antonito, CO 81120 Wednesday 9am – 5pm Friday 9am – 5pm	Center* 260 Worth St. Center, CO 81125 Tuesday 9am – 5pm Thursday & Friday 9am – 5pm
Del Norte* 14443 Hwy 160 Del Norte, CO 81132 Monday – Friday 9am – 5pm	Ft. Garland* 309 Beaubien Ave. Ft. Garland, CO 81133 Monday 9am – 5pm Friday 9am-5pm	La Jara* 322 Walnut La Jara, CO 81140 Monday & Tuesday 9am – 5pm Thursday & Friday 9am – 5pm
Monte Vista* 402 4 th Ave. Monte Vista, CO 81144 Monday 9am – 6pm Tuesday 9am – 6:30pm Wed & Thurs 9am – 6pm Friday 9am – 5pm	San Luis* 409 Trinchera San Luis, CO 81152 Wednesday & Thursday 9am – 5pm	South Fork* 20 Lodge Dr. W. South Fork, CO 81154 Wednesday & Thursday 9am – 5pm

(Offices with a * close for lunch from 12pm -1pm)

Other Locations			
Mi Esperanza Wellness Center 311 San Juan Ave. Alamosa, CO 81101 Monday – Friday 8am – 5pm	New Beginnings 522 Alamosa Ave. Alamosa, CO 81101 Monday, Wednesday, Thursday 10am – 2pm	Lava Lane 2255 Lava Lane Alamosa, CO 81101 Monday – Friday 8am – 5pm	Mobile Unit (At SLVBHG offices) Tues: Center 8am-5pm Wed: Del Norte- 8am-5pm Thurs: Alamosa 8am-11:30am La Jara 1pm- 5pm Friday: Alamosa 8am -5pm (No walk-on services on Friday)



Existing Customers/Clients (demographics, segments)

FY 24 Encountered Clients by Payer:

Medicaid Capitation: 35037
Commercial: 6544
Self-Pay: 7031
State of CO: 1116
CHP+: 989
Local Government: 50
Medicaid Other: 3672
Medicare: 2200

Total: 56,639

Clients Seen by County of Residence:

Alamosa: 1,705
Conejos: 475
Costilla: 330
Mineral: 31
Rio Grande: 956
Saguache: 462
Out of Valley: 106

Total: 4,065

Past/Existing marketing communication/budget

Marketing Budget:

- FY24 - \$46,000
- FY25 - \$55,000
- **FY26 - \$38,000**

This includes advertising (billboards, radio, Facebook), community events, sponsorships, promotional items, etc.

Company culture and image

SLVBHG is committed to fostering a company culture centered on compassion, integrity, collaboration, and innovation. Our culture directly shapes the client experience and our reputation in the community. By aligning internal values with external branding, we create a consistent and credible image that strengthens trust among patients, referral partners, and stakeholders.



Our values (see above) are reinforced through staff training, recognition programs, and transparent leadership communication.

Internal Culture and Employee Engagement

- **Staff Development:** Ongoing professional training in trauma-informed care, cultural competency, and HIPAA compliance.
- **Employee Recognition:** Monthly awards for excellence in patient care and teamwork.
- **Open Communication:** Regular town hall meetings and feedback sessions to ensure alignment between staff and leadership.
- **Wellness Initiatives:** Programs supporting staff mental health and work-life balance, improving retention and patient satisfaction.

Impact on Marketing: A strong internal culture leads to better patient experiences, positive reviews, and authentic storytelling in marketing materials.

SLVBHG projects a professional, approachable, and trustworthy image that reflects our culture. Our internal culture directly supports our external brand. By empowering employees and maintaining clear organizational values, we ensure that every interaction—whether in-person, online, or through community partnerships—reflects the mission of improving the lives of the citizens of the San Luis Valley.

Financial Information

Expense Summary	
	\$15,400,000
Total Expenses (FY 2025-2026)	
	\$12,014,620
Program Expenses	

- FY 25 Actual Total Expense - \$15,542,642 (\$12,187,882 program expense)
- FY 24 Actual Total Expense - \$16,262,246 (\$ 12,947,175 program expense)

Operating Reserve Policy

San Luis Valley Behavioral Health Group (SLVBHG), a transparent 501(c)(3) nonprofit organization, upholds responsible financial stewardship through meticulous record-keeping of revenue earned and expenditures incurred. SLVBHG maintains a policy to hold an approximate



90-day operating cash reserve to ensure uninterrupted service delivery and meet the corresponding cash needs for personnel costs and general operational expenditures.

Transparency is paramount, as is evident in our annual 990s, which are produced by an independent auditor and are accessible to the public. With an unwavering focus on financial stability, SLVBHG maintains its mission-driven services and diligently serves the community.

Economic Impact

In the San Luis Valley, SLVBHG has become an economic engine by transforming mental health care since the 1970s, shifting from institutionalization to community-based support. The 1963 Community Mental Health Act laid the groundwork, fostering community healing. Today, Colorado's Behavioral Health Administration (BHA), established in 2022, continues this shift, focusing on system-wide improvements and community engagement. SLVBHG's funding from county, state, federal, and private sources supports local employment, with 80% allocated to payroll and 8% to community vendors, sponsorships, and events. Its services impact countless lives, helping individuals stabilize and integrate into the workforce, with a social return on investment (ROI) of \$2-\$4 saved per dollar spent. The organization employs 155 professionals to foster resilience, contribute to regional economic vitality, and improve community well-being. SLVBHG exemplifies how community-based mental health services drive personal recovery and economic growth.

External Analysis

- **Environmental Influences**

For SLVBHG, the current landscape of laws and policies—particularly those related to mental health funding, Medicaid reimbursements, telehealth regulations, and behavioral health reform—will significantly influence strategic planning. Shifting state and federal policies can affect how services are delivered, how they are reimbursed, and which populations are prioritized. For example, changes in Medicaid policy may alter funding streams or eligibility criteria, directly impacting service availability and access. Additionally, evolving telehealth regulations may open new opportunities for rural care delivery and require technology upgrades and policy compliance. SLVBHG must closely monitor these legal and policy trends to remain compliant, ensure financial sustainability, and continue meeting the behavioral health needs of its community.

Things to consider: Medicaid cuts at the state and federal level, people having to have jobs to keep Medicaid, and the public health emergency unwinding, which is the primary source of our funding. How does this affect our clientele, income, services we can provide, and staff?



Industry Analysis

Nonprofit safety net behavioral health providers serve individuals facing complex challenges, including serious mental illness, substance use disorders, homelessness, and those experiencing crises. As the primary source of behavioral healthcare for these vulnerable populations, centers provide comprehensive services. This includes 24/7 crisis support, from mobile outreach to residential care. Whether it's outpatient therapy, in-home support, or services within schools, community mental health centers ensure access to care for all Coloradans, regardless of age, income, or insurance status.

Colorado's community-based safety net behavioral health providers are the backbone of our state's behavioral health safety net. For decades, they have been the primary source of skilled, compassionate, community-based care for individuals with serious mental illness and children with severe emotional disturbances. They combine funding from multiple sources to provide comprehensive services, from crisis intervention and therapy to housing support and employment assistance. These providers help individuals live more fulfilling lives and contribute positively to their communities.

Cost Savings: less than \$2,000 per client per year—Colorado's return on its investment in CSNPs saves significant additional costs while allowing Coloradans to remain in their communities for treatment.

Economic Impact: 7,324 jobs provided across Colorado CSNPs are significant employers, contributing to local economies by creating jobs and supporting the livelihoods of thousands of individuals.

- As of 2025, Colorado's *mental health & substance abuse centers* industry is valued at approximately \$412.3 million, with an annual growth rate of 2.3% from 2020 to 2025. Employment in the sector totaled around 2,794 staff, expanding at ~1.2% annually.
- Across Colorado, more than one in four residents (26.2%) reported eight or more days of poor mental health in the past month, while 17% (~880,000 people) were unable to access care when needed.
- The Colorado Behavioral Health Administration (BHA) projected \$8.5 billion in behavioral health expenditures between FY2022–2025; per-household spending in FY2025 reached \$1,029.

Demand Drivers & Health Indicators

- In 2024, Colorado had the **second-highest prevalence of mental illness** nationwide—just behind Oregon.

Challenges & Constraints

- **System fragmentation** persists despite BHA efforts—many agencies continue to manage behavioral health separately, creating duplicative bureaucracy.
- **Funding instability:** Denver-area nonprofits reliant on federal Medicaid and HUD funds face potential service disruptions if federal cuts materialize; local tax-funded alternatives like Caring for Denver may partially offset losses.



- **Access barriers:** Despite high insurance coverage (~95% insured by 2023), many reported unmet needs due to workforce shortages, stigma, and digital exclusion.

Colorado lost approximately \$23 million from mental health block grants tied to the COVID-era American Rescue Plan, which were abruptly canceled by federal authorities. These grants supported around 50 community providers.

Up to \$229 million in health services funding is at risk pending litigation and federal decisions. Temporary injunctions have allowed partial funding to continue, but uncertainty remains unresolved.

- Per capita funding for mental health in Colorado ranks among the lowest in the nation—for example, in 2020 data, Colorado spent approximately \$10,191 per capita, placing it around 47th in national rankings.
- Yet Colorado ranks #17 nationally for access to mental health care and sits in the top 10 for mental health workforce availability - an indication that infrastructure exists but is underfunded.

Competitive Analysis

SLV Health Behavioral Health Services

- Part of San Luis Valley Health (SLVH), the hospital system operating the Regional Medical Center (Alamosa) and Conejos County Hospital
- Provides integrated behavioral health within primary care and hospital settings, with therapy and psychiatry referrals, plus sliding-scale financial assistance

Valley Wide Health Systems (FQHC)

- Prominent Federally Qualified Health Center with multiple sites in SLV and southern CO offering integrated medical and behavioral health services, peer support, veteran outreach, transportation, and prevention-focused programs

Hope in the Valley,

- Detox Services - Safe and medically supervised
- Outpatient Programs and Community Integration - Programs include group therapy, family support, and community-based meetings.

CrossRoads Turning Point

- Social Detox
- Outpatient Programs

Other independent providers, telehealth alternatives, and peer-based programs



The rest of the marketing plan looks into the future & recommendations.

Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis, Reflection, and Strategic Plan

Strengths	Weaknesses
• SLVBHG staff have roots in the valley, which gives a strong sense of community. • SLVBHG has expert, dedicated staff that is equitably compensated. • SLVBHG is in good financial standing. • The board has historical knowledge. • SLVBHG has a good presence as it operates in all six counties and has twelve locations. • SLVBHG mobile health unit. • The leadership team is dedicated and can be counted on to be involved with decision-making. • The infrastructure is a strength. SLVBHG owns its locations and is debt-free. • Technology has always been up to date with state-of-the-art IT. • The CEO is relatively new in that role, but has been with the agency for 24 years and has the perspective of being “staff level.”	• Finances will be spread thinner as SLVBHG becomes a comprehensive provider model and adds more programming. Being in a cost reimbursement model may not allow for growth, as SLVBHG uses historical cost data. • Community members who aren’t clients and aren’t tech savvy may not know much about what SLVBHG does. • Business intelligence/new technology. There may be a need for new investments to respond to changes. • Too much focus on real estate. Money has been spent unnecessarily. • Historically, we have had the perspective “if not us, then who” and would fill every need, but now it’s essential to be more strategic and sometimes meet needs through a partnership rather than ownership of a program/service. • The makeup of the board needs to be more diverse. • It’s essential to empower staff to be up to date with technology, such as ensuring they can access continuing education that will benefit them in their field. • There is a need for culture change after the previous administration. Pivot to empowering and mentoring staff vs penalizing. • The internal weakness is the current structure of the HR department as it responds to HR laws. • With everything that comes at us from the external environment, we don’t stop long enough to reflect internally as we formulate how to respond. • The board doesn’t know workforce trends/data. • The C-suite doesn’t have KPIs or metrics on what the board needs regarding regular updates (maybe a regular CEO report)—this should be tied to the strategic priorities. • Community members may not think of SLVBHG for prevention/intervention. • Need for more community partners and referrals. • Mentality: “we provide excellent service; it doesn’t matter if they like us.” • There is a hesitancy to consider why they’re not coming to the table. • Need to build relationships that have been soured. This can’t reside with just one person (the CEO).

Opportunities	Threats
• Develop and strengthen external partnerships. • SLV Health and Rio Grande will be critical, especially considering comprehensive provider and CCBHC. • SUD-IOP (Substance abuse disorder – intensive outpatient programs) The opportunity is both on the substance use disorder (SUD) and the mental health side. • Apply for CCBHC in the next round of SAMHSA. • Diversify the board because of the requirements of CCBHC. • The BHA could also be a good opportunity (or threat) with the new commissioner. • New regional maps could be an opportunity. • Accountable Care Collaborative (ACC) 3.0 and Behavioral Health Accountable Services Organization (BHASO) • Secure transportation – new legislation requires applying for a license. • Reimbursement is reasonable – revenue cost center. • Can take clients/appointment – no waiting list • Expanding services into New Mexico. • Network with Falling Colors • The 2027 governors' election could be a threat or an opportunity. • Growth through acquisitions – SLVBHG is in a strong financial and operational position. • Workforce sharing may be an opportunity, partnership, or affiliation.	• Develop and strengthen external partnerships. • SLV Health and Rio Grande will be critical, especially as we look at comprehensive provider and CCBHC. • Opportunity to be a comprehensive provider and develop more services. • SUD-IOP (Substance abuse disorder – intensive outpatient programs) • The opportunity is both on the substance use disorder (SUD) and the mental health side. • Apply for CCBHC in the next round of SAMHSA grants in March. • Diversify the board because of the requirements of CCBHC. • The BHA could also be a good opportunity (or threat) with the new commissioner. • New regional maps could be an opportunity. • Accountable Care Collaborative (ACC) 3.0 and Behavioral Health • Accountable Services Organization (BHASO) • Secure transportation – new legislation requires applying for a license. • Reimbursement is reasonable – revenue cost center. • Can take clients at any appointment. • Expanding services into New Mexico. • Network with Falling Colors – an organization highlighted by Patrick. • The 2027 governors' election could be a threat or an opportunity. • Acquisitions and mergers

Market Opportunity Analysis

The 2025 SLVH/Rio Grande Clinics and Hospital/Colorado Health Institute CHNA health needs assessments identify **substance use and mental health** as top regional priorities through 2029.

SLV faces one of the **highest opioid overdose rates in Colorado**, with significant community concern around substance misuse trends.

Service environments lack local inpatient or residential care beds, intensifying reliance on outpatient and external referrals.



Marketing Objective

Goal: Build a strong brand presence that naturally attracts clients and referral partners over time.

Objective: Increase immediate awareness of services and drive direct referrals from providers, payers, and community partners.

Objective: Build long-term demand by positioning SLVBHG as the trusted behavioral health provider in the community.

Marketing Strategy

The push-pull marketing strategy for SLVBHG integrates direct outreach with demand-generation tactics to increase client access, strengthen referral networks, and position the organization as a trusted behavioral health provider. Push tactics generate immediate awareness, while pull tactics build sustainable brand recognition and client loyalty.

Marketing Mix (4 Ps)

To meet the objectives of expanding service awareness, improving access, and strengthening community trust, SLVBHG will implement targeted strategies in each area of the marketing mix:

Product

SLVBHG offers a comprehensive array of behavioral health services, including individual and group therapy, crisis intervention, psychiatric care, substance use treatment, and case management. To increase engagement and meet evolving needs:

- Services will be expanded in nursing homes, school-based counseling, telehealth, and peer support.
- A focus will be placed on integrating care for co-occurring mental health and substance use disorders.
- SLVBHG will highlight its mobile crisis team, which is unique in its ability to reach underserved rural clients.

Pricing

As a nonprofit, SLVBHG already provides services on a sliding fee scale, accepts Medicaid/Medicare, and partners with grant funders. To maintain affordability and reduce financial barriers:

- The organization will communicate payment assistance options through marketing materials and intake processes.



- Outreach will target underinsured populations to educate them on low-cost service availability.
- SLVBHG will monitor policy changes that impact Medicaid reimbursements and adjust funding strategy accordingly.
- SLVBHG will monitor policy changes that impact Uninsured and Underinsured and adjust funding strategy accordingly.

Place

SLVBHG operates multiple service sites across the San Luis Valley, in addition to its mobile units and telehealth services. To improve accessibility:

- Telehealth services will be expanded, focusing on technology assistance for rural clients.
- Partnerships with schools, probation, nursing homes, and local organizations will increase service access points.
- Transportation assistance and mobile care units will be promoted as key differentiators for reaching remote areas.

Promotion

Promotional efforts will raise awareness, reduce stigma, and increase service utilization. Strategies include:

- Social media campaigns featuring client success stories (with consent) to humanize services and highlight positive outcomes.
- Collaboration with schools, clinics, and other community organizations to distribute flyers, give presentations, and build referral networks.
- Hosting community events and mental health awareness workshops to strengthen relationships and visibility.
- A revamped website and online scheduling platform to make accessing care easier for all demographics.
- Improve referral and coordination systems to build stronger partnerships and referral networks.

Distribution

The distribution strategy for SLVBHG focuses on ensuring accessible, client-centered behavioral health services through direct and referral-based channels. Our approach integrates physical locations, virtual care options, and community-based outreach to reduce barriers and expand service availability. This hybrid model is designed to meet the needs of diverse populations, including the underserved rural communities in the San Luis Valley.



SLVBHG has 12 office locations throughout the San Luis Valley, including satellite offices in each county. We provide 24/7 mobile crisis response throughout the San Luis Valley. We have HIPAA-compliant telehealth platforms and secure client appointment scheduling, messaging, and educational resources. We partner with schools, employers, community health centers, probation, and other human services organizations. In addition, SLVBHG provides regular outreach events and participates in public health fairs. Referrals are managed through a streamlined, electronic health record (EHR)-integrated portal, ensuring timely intake and reducing administrative barriers. Regular communication and performance reports are shared with referral partners to strengthen relationships and improve patient outcomes.

Integrated Marketing Communication

Bringing Hope Home

Mental health and recovery shouldn't be out of reach. That's why SLVBHG offers local, compassionate care tailored for the San Luis Valley. From community-based programs to telehealth and outpatient counseling, we're here to ensure you and your family can get help close to home.

approach: focuses on hope and local access, appealing to rural communities' pride and convenience.

Integrated Marketing Communications (IMC) in behavioral health involves creating a unified, strategic approach to delivering consistent messages across multiple channels to increase awareness, reduce stigma, and build trust among clients, providers, payers, and the community. Because behavioral health services are often sensitive and stigmatized, IMC must be informative and empathetic while aligning with regulatory and ethical standards.

The push-pull marketing strategy for SLVBHG integrates direct outreach with demand-generation tactics to increase client access, strengthen referral networks, and position the organization as a trusted behavioral health provider. Push tactics generate immediate awareness, while pull tactics build sustainable brand recognition, loyalty, and engagement. When combined, push tactics create initial awareness, while pull tactics build credibility and ongoing demand.

Goal: Build a strong brand presence that naturally attracts clients and referral partners over time to drive utilization.

Objective: Increase immediate awareness of services and drive direct referrals from providers, payers, and community partners.

Objective: Build long-term demand by positioning SLVBHG as the trusted behavioral health provider in the community.



External Marketing

- Social Media- LinkedIn, Instagram, TikTok, Facebook – videos and ads
- Radio Ads
- Local Paper
- Blogs
- Website design
- Email marketing – Newsletters for varied audiences
- Public Health Fairs
- Community Events
- Sponsorships and donations

Internal Marketing

- Align staff with branding and messaging to ensure every client interaction reinforces the organization's mission.
 - Why I Work Here Campaign
 - Get to know our Staff and Services
- Provide training on empathetic language and communication protocols.

Interactive Marketing

The goal of interactive marketing in behavioral health is to create meaningful two-way engagement that builds trust, reduces stigma, and encourages early help-seeking. This approach is especially important in rural communities, where access to care can be limited and stigma may prevent people from reaching out. Interactive marketing not only raises awareness of services but also fosters ongoing relationships, ensuring individuals feel heard, supported, and empowered to take the next step toward wellness.

- Increase community awareness of behavioral health services.
- Engage residents in two-way conversations about mental health.
- Reduce stigma and encourage early help-seeking.
- Build lasting client-provider relationships through ongoing engagement.

Marketing Program

- July 2025 through June 2026 - \$38,000
 - Billboards – \$18,000
 - Radio – \$1,000
 - Facebook \$3,000
 - Community Events – \$5,000
 - Sponsorships – \$6,000



- o Other Marketing – \$5,000
- **Increase awareness** of available behavioral health services by SLVBHG.
- **Build trust** with local communities, clients, and partners.
- **Reduce stigma** around mental health and substance use treatment.
- **Drive utilization** of telehealth, school-based, elderly, dual diagnosis, and bilingual services.
- **Position the organization** as the leading behavioral health provider in the region.

Evaluation and Control

SLVBHG can differentiate itself by combining mobile services, bilingual, culturally aligned care, partnerships with schools and other community partners, and workforce development networks. This could generate grant support, strengthen local referral networks, and address persistent service gaps.

The effectiveness of the distribution strategy will be measured by:

- Number of new intakes by channel (clinic, telehealth, referral).
- Referral conversion rate (how many referred clients enroll in services)
- Geographic reach and penetration (17%) into underserved ZIP codes.
- Telehealth utilization rate.
- Patient satisfaction and no-show rate reductions.

Shared KPIs (Communications, Marketing & Development Department)

1. Community Engagement & Awareness

- **Monthly increase in social media engagement** (likes, shares, comments, DMs) – target: +10% MoM
- **Website traffic growth** – target: 10% quarterly increase in unique visitors
- **Newsletter open rate** – target: >30% average open rate

2. Media & Public Relations

- **Press/media mentions per quarter** – target: 5 per quarter
- **Quarterly community-facing article placements** (e.g., in local newspapers like the *Valley Courier*) – target: 2 per quarter
- **Positive media sentiment rating** (if tracked manually or with a tool) – goal: 70%+

3. Internal Communications & Staff Engagement



- **Employee engagement survey response rate** – target: >75% participation
- **CEO video update viewership rate** – target: >60% of staff watching within 7 days
- **Monthly internal campaigns executed (recognition, updates, etc.)** – target: 1-2/month

Communications KPIs (Strategic, Narrative, Leadership Focused)

- **Strategic initiative launch per year** (e.g., Billboard campaign, donor/partner recognition program, awareness videos) – *at least 3 major initiatives/year*
- **Community partnerships established or maintained** – target: 5-7 active collaborations
- **Stakeholder report delivery rate** – *on-time delivery of 100% of quarterly or annual updates*
- **Storytelling content produced** (video, testimonials, etc.) – *at least 1 per month*

Marketing KPIs (Execution, Digital, Budget/Analytics Focused)

- **Ad campaign ROI or cost-per-click (CPC) improvement** – goal: *10% CPC decrease over time*
- **Department budget variance** – keep within *5% of budget*
- **Content calendar adherence** – *>90% of posts published on schedule*

Social media post reach per month – target: *10k+ total impressions*

Conclusion

Service design and marketing strategies are essential for industries that rely on services. Effective service delivery requires managing customer expectations and incorporating self-service technologies. Understanding customer expectations is key to enhancing their service experience. Service organizations must regularly assess service quality by analyzing each service encounter's impact. SLVBHG Marketing efforts aim to strengthen customer relationships through personalized communication, relationship building, and social media engagement, which help create lasting bonds. SLVBHG can better understand customer expectations and adapt its service delivery accordingly by focusing on innovation, technology, and relationship-building.



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CEO Evaluation Form

Purpose: To assess the CEO's performance in alignment with organizational mission, strategy, and leadership effectiveness. This form supports accountability, development, and alignment between the CEO and Board of Directors.

We have two options for creating an electronic evaluation, they cover similar information but more of a style preference. I can also create a combination of the two with a rating section with no narrative section and then a few narrative questions.

CEO Attribute Rating Form

Purpose: This tool is designed to help the Board of Directors evaluate the CEO's leadership attributes, behavioral competencies, and overall effectiveness. Ratings are based on observed performance and impact.

Rating Scale

Rating	Description
5	Exceptional – Consistently demonstrates excellence; exceeds expectations
4	Strong – Performs above average; often exceeds expectations
3	Competent – Fully meets expectations; solid and reliable
2	Developing – Inconsistently meets expectations; needs improvement
1	Unsatisfactory – Rarely meets expectations

I. Leadership and Vision

Attribute	Rating (1–5)	Comments / Examples
Demonstrates clear, mission-driven vision.	☐	
Inspires confidence among staff and stakeholders.	☐	

Leads organizational change effectively.	☐	
Displays sound judgment and decision-making.	☐	
Models integrity and ethical leadership.	☐	

II. Strategic & Operational Management

Attribute	Rating (1–5)	Comments / Examples
Aligns strategy with mission and goals.	☐	
Monitors progress toward strategic objectives.	☐	
Ensures compliance and risk management.	☐	

Demonstrates fiscal responsibility and accountability.	☐	
Adapts operations to meet emerging needs.	☐	

III. Community & Stakeholder Relations

Attribute	Rating (1–5)	Comments / Examples
Builds collaborative relationships and partnerships.	☐	
Effectively represents the organization in the community.	☐	
Advocates for behavioral health access and equity.	☐	

Engages funders, partners, and policymakers.	☐	
Promotes public trust and transparency.	☐	

IV. Board & Governance Relations

Attribute	Rating (1–5)	Comments / Examples
Keeps Board informed and engaged.	☐	
Provides accurate, timely reports.	☐	
Fosters constructive Board-CEO relationships.	☐	
Respects governance boundaries and	☐	

accountability.		
Contributes to Board development and strategic focus.	☐	

V. Organizational Culture & People Leadership

Attribute	Rating (1–5)	Comments / Examples
Promotes a healthy, inclusive culture.	☐	
Encourages staff development and recognition.	☐	
Demonstrates empathy and emotional intelligence.	☐	
Communicates effectively across all levels.	☐	

Strengthens staff engagement and morale.	☐	

VI. Overall Assessment

Attribute	Rating (1–5)	Comments / Examples
Overall performance as CEO.	☐	
Alignment with mission and values.	☐	
Future potential and leadership growth.	☐	

Board Chair Comments

CEO Comments

Board Chair: _____ Date: _____

CEO: _____ Date: _____

2nd Option

Strategic Leadership & Vision

- Leads the organization toward its mission with clear strategic vision.
- Demonstrates innovation and adaptability in changing environments.
- Effectively communicates strategic direction to stakeholders.

Rating: ☐ Exceeds Expectations ☐ Meets Expectations ☐ Needs Improvement

Comments / Narrative:

Operational & Financial Management

- Ensures sound fiscal stewardship and compliance with regulations.
- Oversees sustainable budgeting and risk management.
- Strengthens systems supporting quality outcomes and efficiency.

Rating: ☐ Exceeds Expectations ☐ Meets Expectations ☐ Needs Improvement

Comments / Narrative:

Community Impact & Partnerships

- Builds strong relationships with funders and community stakeholders.
- Advances organizational reputation in behavioral health.
- Promotes equitable access for underserved populations.

Rating: ☐ Exceeds Expectations ☐ Meets Expectations ☐ Needs Improvement

Comments / Narrative:

Board Relations & Governance

- Keeps the Board informed and engaged in governance.
- Encourages transparent communication and collaboration.
- Supports board development aligned with mission.

Rating: ☐ Exceeds Expectations ☐ Meets Expectations ☐ Needs Improvement

Comments / Narrative:

Organizational Culture & Leadership

- Models integrity, empathy, and accountability.
- Promotes a positive and inclusive work culture.
- Prioritizes staff well-being and development.

Rating: ☐ Exceeds Expectations ☐ Meets Expectations ☐ Needs Improvement

Comments / Narrative:

Key Outcomes & Performance Indicators

- Progress toward strategic plan milestones.
- Financial and programmatic performance indicators.
- Workforce engagement and stability metrics.

Rating: ☐ Exceeds Expectations ☐ Meets Expectations ☐ Needs Improvement

Comments / Narrative:

Can you describe CEO's strengths or what she does well?

What if anything, do you wish she did differently?

Professional Development Goals

Identify 2-3 leadership growth goals and supports needed:

Goals / Narrative:

Board Support:

Overall Summary

Overall Rating: ☐ Exceeds Expectations ☐ Meets Expectations ☐ Needs Improvement

Board Chair Comments:

CEO Comments:

Board Chair: _____ Date: _____

CEO: _____ Date: _____

San Luis Valley Community Mental Health Center Board Meeting

October 28, 2025

Vision: To improve the quality of life for the residents of the San Luis Valley.

Mission: To provide access to quality behavioral health services that enrich lives and promote wellness. We are driven by a profound respect for human dignity and a desire to serve the underrepresented, the disenfranchised, and those who experience behavioral distress.

Values:

Excellence

Activism

Ethical Practices

Innovation

Diversity

***indicates an action item/vote**

- 1) Roll Call/Declaration of Quorum
- 2) *Approval of Agenda
- 3) *Approval of Minutes
- 4) Correspondence Review
- 5) Other Business
- 6) Next Meeting- November 25, 2025
- 7) Adjournment

San Luis Valley Community Mental Health Center

October 28, 2025

**SLVBHG Board
Room**

Member Present: Pat Stanford, Mark Manzanares, Laurie Rivera, Jody Kern, Jerry Gallegos, Olivia How, and Victoria Romero

Members Excused: Louise Sanchez and George Wilkinson

Staff Present: Kyle Turnwall and Angie Gallegos

1. Roll Call/Declaration of Quorum

2. Approval of Agenda

It was M/S by Mark Manzanares and Laurie Rivera to approve the agenda as presented. Motion carried.

3. Approval of Minutes

It was M/S by Mark Manzanares and Laurie Rivera to approve the minutes dated August 26, 2025, with the correction of adding Jody Kern as a Member Present. Motion carried.

4. Correspondence Review

There was no correspondence to review.

5. Other Business

There was no other business to discuss.

6. Next Meeting

The next meeting date is October 28, 2025.

7. Adjournment

The meeting was adjourned at 7:11 pm.