

San Luis Valley Behavioral Health Group Board Meeting

November 25, 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
School-Based/Adolescent Services Leova Mascarenas and Bonnie Ortega	5:05 pm-5:30 pm
Member Advisory Committee Victoria Romero	5:30 pm-5:55 pm
*Finance Report Kyle Turnwall	5:55 pm-6:25 pm
Executive Committee Report Pat Stanford	6:25 pm -6:40 pm
CEO Report Victoria Romero	6:40 pm-6:50 pm
Correspondence Review Angie Gallegos	6:50 pm-6:52 pm
Other Business Pat Stanford/Victoria Romero	6:52 pm-6:59 pm
Adjournment- Next Meeting: December 18, 2025 Pat Stanford	6:59 pm-7:00 pm

San Luis Valley Behavioral Health Group Board Meeting

October 28, 2025, 5:00 pm

San Luis Valley Behavioral Health Board Room

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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.

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<u>Agenda</u> <i>*Indicates an action item/vote</i>	
Roll Call/Declaration of Quorum Member Present: Mark Manzanares, Laurie Rivera, George Wilkinson, Jerry Gallegos, Louise Sanchez, Olivia How, and Victoria Romero Members Excused: Pat Stanford and Jody Kern Staff Present: Kyle Turnwall, Jennifer Silva, Susan Graham, and Angie Gallegos Guest Present: Matt Landis	5:00 pm-5:01 pm
*Approval of Agenda It was M/S by Jerry Gallegos and Laurie Rivera to approve the agenda with the addition of Louise's CBHC report under other business. Motion carried.	5:01 pm-5:03 pm
*Approval of Minutes It was M/S by Laurie Rivera and George Wilkinson to approve the minutes dated September 30, 2025. Motion carried.	5:03 pm-5:05 pm
Community Partnership Update-Crisis Jennifer Silva and Susan Graham attended the board meeting to discuss Crisis updates. They discussed 988 and Solari, and how this changed how our ES team is dispatched. They discussed Peer Specialist Certification, which three of our staff members will need. They discussed the challenges in Mineral County. Lastly, they spoke of our relationship with our local ERs.	5:05 pm-5:20 pm
Board Fiduciary Duties/Governance Training Matt Landis was present to lead board members through the annual training on board fiduciary duties and governance. His presentation was emailed to the board before the meeting. Matt's training was recorded and emailed to board members who were unable to attend the meeting.	5:20 pm-5:50 pm
Annual Report Victoria Romero presented the final draft of the FY25 Annual Report. The report was included in the board packet for review.	5:50 pm-6:05 pm
Quarterly Strategic Plan Update Victoria Romero gave a presentation on our strategic plan. Her presentation was included in the board packet for review.	6:05 pm-6:20 pm

*Finance Report Kyle Turnwall presented the financial statements for the month ending September 31, 2025. He reviewed the balance sheet liquidity, operating revenue, operating expenses, the Medicaid PPS reconciliation, the consolidated statements of operations, and capital projects. It was M/S by Jerry Gallegos and Louise Sanchez to approve the financial statements and file them for audit. Motion carried.	6:20 pm-6:40 pm
Executive Committee Report Mark Manzanares reported that there was no Executive Committee meeting in October.	6:40 pm -6:43 pm
CEO Report The CEO Report is in the Board Packet for review.	6:43 pm-6:53 pm
Correspondence Review There was no correspondence to review.	6:53 pm-6:55 pm
Other Business Louise Sanchez gave an update on her experience at the CBHC conference. The themes that stood out to her were “clinical compassion” and “resilience of life”.	6:55 pm-6:59 pm
Adjournment- Next Meeting: November 25, 2025 The meeting was adjourned at 7:18 pm.	6:59 pm-7:00 pm



FINANCIAL REPORT

OCTOBER 2025

SAN LUIS VALLEY BEHAVIORAL HEALTH GROUP
CONSOLIDATED BALANCE SHEET
OCTOBER 31, 2025

	Community Mental Health Center	Asset Management Corporation	Intercompany Eliminations	Consolidated San Luis Valley Behavioral Health Group
ASSETS				
Cash	3,931,487	\$ 937,643	\$ -	\$ 4,869,130
Investments	5,425,115	10,033,669	-	15,458,784
Grants Receivable	219,259	-	-	219,259
Interest Receivable	-	4,697	-	4,697
Intercompany Receivable	-	54,876	(54,876)	-
Prepaid Expenses and Other Assets	388,989	-	-	388,989
Notes Receivable	-	983,381	-	983,381
Investment in Health Colorado, Inc.	1,085,366	-	-	1,085,366
Right-of-Use Assets, net	-	376,500	-	376,500
Property and Equipment, net	92,429	6,713,382	-	6,805,811
TOTAL ASSETS	\$ 11,142,645	\$ 19,104,148	\$ (54,876)	\$ 30,191,917
LIABILITIES				
Accounts Payable	75,424	1,151	-	76,575
Accrued Payroll and Employee Benefits	773,359	-	-	773,359
Due to Health Colorado	80,000	-	-	80,000
Due to Rocky Mountain Health Plans	120,000	-	-	120,000
Leases Payable	-	365,436	-	365,436
Intercompany Payable	54,876	-	(54,876)	-
Security Deposits	15,078	9,653	-	24,731
Deferred Revenue	1,692	2,500	-	4,192
TOTAL LIABILITIES	1,120,429	378,740	(54,876)	1,444,293
NET ASSETS	10,022,216	18,725,408	-	28,747,624
TOTAL LIABILITIES AND NET ASSETS	\$ 11,142,645	\$ 19,104,148	\$ (54,876)	\$ 30,191,917

San Luis Valley Behavioral Health Group
San Luis Valley Community Mental Health Center
Balance Sheet
October 31, 2025

	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Checking - CMHC Operating	\$3,630,132.80
1015 - Cash in Bank - Credit Cards	\$1,366.58
1020 - Cash in Bank - Cafe	\$12,175.32
1080 - Money Market - SLV Federal Bank	\$286,701.93
1095 - Petty Cash	\$1,110.00
Total Bank	\$3,931,486.63
Accounts Receivable	
1210 - Accounts Receivable - Grants	\$219,259.07
Total Accounts Receivable	\$219,259.07
Other Current Asset	
1300 - Prepaid Expenses	
1310 - Prepaid Expenses - Insurance	\$118,303.47
1320 - Prepaid Expenses - Licenses	\$270,685.56
Total - 1300 - Prepaid Expenses	\$388,989.03
Total Other Current Asset	\$388,989.03
Total Current Assets	\$4,539,734.73
Fixed Assets	
1500 - Property and Equipment	
1530 - Furniture and Equipment	\$108,245.84
Total - 1500 - Property and Equipment	\$108,245.84
1600 - Accumulated Depreciation and Amortization	(\$15,817.20)
Total Fixed Assets	\$92,428.64
Other Assets	
1800 - Investments	
1810 - Investments - LPL Financial - CMHC	\$5,425,115.14
1850 - Investment in Health Colorado Inc.	\$1,085,366.00
Total - 1800 - Investments	\$6,510,481.14
Total Other Assets	\$6,510,481.14
Total ASSETS	\$11,142,644.51
Liabilities & Equity	
Current Liabilities	
Accounts Payable	\$75,421.23
Other Current Liability	
2050 - Accrued Expenses	(\$3.63)
2120 - Accrued Vacation Payable	\$513,723.13
2300 - Employee Benefits Payable	\$259,635.72
2501 - Due to Health Colorado Inc	\$80,000.00
2502 - Due to Rocky Mountain Health Plans	\$120,000.00
2510 - Sales Tax Payable	\$6.46
2590 - Deferred Revenue	\$1,692.00
2595 - Intercompany Payable	\$54,876.09
Total Other Current Liability	\$1,029,929.77
Total Current Liabilities	\$1,105,351.00
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	(\$266,170.63)
Total Equity	\$10,022,215.51
Total Liabilities & Equity	\$11,142,644.51

**San Luis Valley Behavioral Health Group
San Luis Valley Asset Management Corporation
Balance Sheet
October 31, 2025**

	AMOUNT
ASSETS	
Current Assets	
Bank	
1010 - Checking - Asset Management Operating	\$937,642.94
Total Bank	\$937,642.94
Accounts Receivable	\$4,697.34
Other Current Asset	
1395 - Intercompany Receivable	\$54,876.09
Total Other Current Asset	\$54,876.09
Total Current Assets	\$997,216.37
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	\$53,842.00
Total - 1500 - Property and Equipment	\$11,959,686.94
1600 - Accumulated Depreciation and Amortization	(\$4,869,805.09)
Total Fixed Assets	\$7,089,881.85
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	\$10,033,669.37
Total - 1800 - Investments	\$10,033,669.37
Total Other Assets	\$11,017,050.17
Total ASSETS	\$19,104,148.39
Liabilities & Equity	
Current Liabilities	
Accounts Payable	\$1,150.60
Other Current Liability	
2590 - Deferred Revenue	\$2,500.00
Total Other Current Liability	\$2,500.00
Total Current Liabilities	\$3,650.60
Long Term Liabilities	
2710 - Rental Security Deposits	\$9,653.00
2750 - Lease Liability - Vehicles	\$365,436.20
Total Long Term Liabilities	\$375,089.20
Equity	
Retained Earnings	\$17,912,783.04
Net Income	\$812,625.55
Total Equity	\$18,725,408.59
Total Liabilities & Equity	\$19,104,148.39

SAN LUIS VALLEY BEHAVIORAL HEALTH GROUP
CONSOLIDATED STATEMENT OF OPERATIONS
OCTOBER 31, 2025

	Community Mental Health Center	Asset Management Corporation	Intercompany Eliminations	Consolidated San Luis Valley Behavioral Health Group
REVENUE				
Client Service Revenue	\$ 3,876,534	\$ -	\$ -	\$ 3,876,534
Government Grant Income	820,398	-	-	820,398
Contributions and Other Grant Income	40,743	-	-	40,743
Lease Income	61,236	226,693	(170,859)	117,070
Other Operating Income	79,954	-	-	79,954
Total REVENUE	4,878,865	226,693	(170,859)	4,934,699
EXPENSES				
Salaries and Wages	3,113,383	-	-	3,113,383
Payroll Taxes	233,973	-	-	233,973
Employee Benefits	793,104	-	-	793,104
Advertising and Marketing	12,791	-	-	12,791
Client	15,080	-	-	15,080
Conferences, Trainings and Meetings	45,710	-	-	45,710
Depreciation and Amortization	6,700	166,215	-	172,915
Information Technology	307,548	-	-	307,548
Liability Insurance	34,880	-	-	34,880
Licenses, Fees and Dues	89,924	-	-	89,924
Occupancy	289,425	14,191	(104,283)	199,333
Office Expense	43,000	-	-	43,000
Professional Fees	75,230	-	-	75,230
Travel	41,066	-	-	41,066
Vehicle Expense	112,587	-	(66,576)	46,011
Other Operating Expense	3,138	16,365	-	19,503
Total EXPENSES	5,217,539	196,771	(170,859)	5,243,451
OPERATING INCOME (LOSS)	(338,674)	29,922	-	(308,752)
OTHER INCOME (EXPENSE)				
Interest Income	1,998	18,505	-	20,503
Investment Income	55,179	119,025	-	174,204
Gain on Disposal of Property & Equipment	-	10,039	-	10,039
Unrealized Gain (Loss) on Investments	15,327	635,135	-	650,462
Total OTHER INCOME (EXPENSE)	72,504	782,704	-	855,208
CHANGE IN NET ASSETS	(266,170)	812,626	-	546,456
NET ASSETS - 06/30/2025	10,288,386	17,912,782	-	28,201,168
NET ASSETS - 10/31/2025	\$ 10,022,216	\$ 18,725,408	\$ -	\$ 28,747,624

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

	AMOUNT	BUDGET AMOUNT	AMOUNT OVER BUDGET	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Client Service Revenue	\$975,328.27	\$969,300.00	\$6,028.27	100.62%
4200 - Government Grant Income	\$199,396.05	\$209,750.00	(\$10,353.95)	95.06%
4400 - Contributions and Other Grant Income	\$882.11	\$2,500.00	(\$1,617.89)	35.28%
4700 - Rental Income	\$15,847.00	\$16,500.00	(\$653.00)	96.04%
4900 - Other Operating Income	\$13,665.85	\$6,250.00	\$7,415.85	218.65%
Total - Income	\$1,205,119.28	\$1,204,300.00	\$819.28	100.07%
Gross Profit	\$1,205,119.28	\$1,204,300.00	\$819.28	100.07%
Expense				
6200 - Salaries and Wages	\$746,904.69	\$782,000.00	(\$35,095.31)	95.51%
6300 - Payroll Taxes	\$56,009.92	\$61,615.00	(\$5,605.08)	90.90%
6400 - Employee Benefits	\$151,657.86	\$191,790.00	(\$40,132.14)	79.07%
7000 - Advertising and Marketing	\$2,114.05	\$3,050.00	(\$935.95)	69.31%
7050 - Client	\$2,950.96	\$4,500.00	(\$1,549.04)	65.58%
7100 - Conferences, Trainings and Meetings	\$4,280.52	\$6,000.00	(\$1,719.48)	71.34%
7150 - Depreciation and Amortization	\$1,675.10	\$2,500.00	(\$824.90)	67.00%
7200 - Information Technology	\$64,397.78	\$60,875.00	\$3,522.78	105.79%
7250 - Liability Insurance	\$8,210.33	\$9,500.00	(\$1,289.67)	86.42%
7300 - Licenses, Fees and Dues	\$18,514.60	\$31,350.00	(\$12,835.40)	59.06%
7400 - Occupancy	\$77,394.00	\$67,775.00	\$9,619.00	114.19%
7500 - Office Expense	\$10,765.87	\$12,700.00	(\$1,934.13)	84.77%
7650 - Professional Fees	\$3,500.00	\$12,850.00	(\$9,350.00)	27.24%
7700 - Travel	\$12,068.22	\$9,475.00	\$2,593.22	127.37%
7800 - Vehicle Expense	\$29,473.93	\$31,050.00	(\$1,576.07)	94.92%
7900 - Other Operating Expense	\$174.73	\$1,350.00	(\$1,175.27)	12.94%
Total - Expense	\$1,190,092.56	\$1,288,380.00	(\$98,287.44)	92.37%
Net Ordinary Income	\$15,026.72	(\$84,080.00)	\$99,106.72	-17.87%
Other Income and Expenses				
Other Income				
9000 - Other Income				
9010 - Interest Income	\$574.92	\$0.00	\$574.92	0.00%
9020 - Investment Income	\$8,518.50	\$15,500.00	(\$6,981.50)	54.96%
9030 - Unrealized Gain (Loss) on Investments	\$1,618.50	\$0.00	\$1,618.50	0.00%
Total - 9000 - Other Income	\$10,711.92	\$15,500.00	(\$4,788.08)	69.11%
Total - Other Income	\$10,711.92	\$15,500.00	(\$4,788.08)	69.11%
Net Other Income	\$10,711.92	\$15,500.00	(\$4,788.08)	69.11%
Net Income	\$25,738.64	(\$68,580.00)	\$94,318.64	-37.53%

**San Luis Valley Behavioral Health Group
San Luis Valley Community Mental Health Center
Budget vs. Actual Statement of Operations
Fiscal Year-To-Date October 31, 2025**

	AMOUNT	BUDGET AMOUNT	AMOUNT OVER BUDGET	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Client Service Revenue	\$3,876,534.33	\$3,877,200.00	(\$665.67)	99.98%
4200 - Government Grant Income	\$820,397.79	\$1,089,000.00	(\$268,602.21)	75.33%
4400 - Contributions and Other Grant Income	\$40,743.08	\$10,000.00	\$30,743.08	407.43%
4700 - Rental Income	\$61,235.50	\$66,000.00	(\$4,764.50)	92.78%
4900 - Other Operating Income	\$79,954.28	\$30,000.00	\$49,954.28	266.51%
Total - Income	\$4,878,864.98	\$5,072,200.00	(\$193,335.02)	96.19%
Gross Profit	\$4,878,864.98	\$5,072,200.00	(\$193,335.02)	96.19%
Expense				
6200 - Salaries and Wages	\$3,113,382.70	\$3,128,000.00	(\$14,617.30)	99.53%
6300 - Payroll Taxes	\$233,973.03	\$246,460.00	(\$12,486.97)	94.93%
6400 - Employee Benefits	\$793,103.68	\$774,870.00	\$18,233.68	102.35%
7000 - Advertising and Marketing	\$12,791.19	\$13,600.00	(\$808.81)	94.05%
7050 - Client	\$15,080.32	\$18,000.00	(\$2,919.68)	83.78%
7100 - Conferences, Trainings and Meetings	\$45,710.34	\$49,750.00	(\$4,039.66)	91.88%
7150 - Depreciation and Amortization	\$6,700.40	\$10,000.00	(\$3,299.60)	67.00%
7200 - Information Technology	\$307,548.29	\$303,500.00	\$4,048.29	101.33%
7250 - Liability Insurance	\$34,880.32	\$44,000.00	(\$9,119.68)	79.27%
7300 - Licenses, Fees and Dues	\$89,923.96	\$115,900.00	(\$25,976.04)	77.59%
7400 - Occupancy	\$289,425.09	\$272,900.00	\$16,525.09	106.06%
7500 - Office Expense	\$43,000.17	\$48,300.00	(\$5,299.83)	89.03%
7650 - Professional Fees	\$75,229.54	\$94,400.00	(\$19,170.46)	79.69%
7700 - Travel	\$41,065.52	\$37,900.00	\$3,165.52	108.35%
7800 - Vehicle Expense	\$112,587.26	\$132,600.00	(\$20,012.74)	84.91%
7900 - Other Operating Expense	\$3,138.09	\$5,400.00	(\$2,261.91)	58.11%
Total - Expense	\$5,217,539.90	\$5,295,580.00	(\$78,040.10)	98.53%
Net Ordinary Income	(\$338,674.92)	(\$223,380.00)	(\$115,294.92)	151.61%
Other Income and Expenses				
Other Income				
9000 - Other Income				
9010 - Interest Income	\$1,998.09	\$0.00	\$1,998.09	0.00%
9020 - Investment Income	\$55,179.23	\$62,000.00	(\$6,820.77)	89.00%
9030 - Unrealized Gain (Loss) on Investments	\$15,326.97	\$0.00	\$15,326.97	0.00%
Total - 9000 - Other Income	\$72,504.29	\$62,000.00	\$10,504.29	116.94%
Total - Other Income	\$72,504.29	\$62,000.00	\$10,504.29	116.94%
Net Other Income	\$72,504.29	\$62,000.00	\$10,504.29	116.94%
Net Income	(\$266,170.63)	(\$161,380.00)	(\$104,790.63)	164.93%

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

	AMOUNT	BUDGET AMOUNT	AMOUNT OVER BUDGET	% OF BUDGET
Ordinary Income/Expense				
Income				
4700 - Rental Income	\$56,793.12	\$55,500.00	\$1,293.12	102.33%
Total - Income	\$56,793.12	\$55,500.00	\$1,293.12	102.33%
Gross Profit	\$56,793.12	\$55,500.00	\$1,293.12	102.33%
Expense				
7150 - Depreciation and Amortization	\$41,951.39	\$42,750.00	(\$798.61)	98.13%
7400 - Occupancy	\$2,410.98	\$5,000.00	(\$2,589.02)	48.22%
7900 - Other Operating Expense	\$3,963.50	\$3,750.00	\$213.50	105.69%
Total - Expense	\$48,325.87	\$51,500.00	(\$3,174.13)	93.84%
Net Ordinary Income	\$8,467.25	\$4,000.00	\$4,467.25	211.68%
Other Income and Expenses				
Other Income				
9000 - Other Income				
9010 - Interest Income	\$0.00	\$4,500.00	(\$4,500.00)	0.00%
9020 - Investment Income	\$29,848.09	\$25,000.00	\$4,848.09	119.39%
9030 - Unrealized Gain (Loss) on Investments	\$13,106.53	\$0.00	\$13,106.53	0.00%
Total - 9000 - Other Income	\$42,954.62	\$29,500.00	\$13,454.62	145.61%
Total - Other Income	\$42,954.62	\$29,500.00	\$13,454.62	145.61%
Net Other Income	\$42,954.62	\$29,500.00	\$13,454.62	145.61%
Net Income	\$51,421.87	\$33,500.00	\$17,921.87	153.50%

**San Luis Valley Behavioral Health Group
San Luis Valley Asset Management Corporation
Budget vs. Actual Statement of Operations
Fiscal Year-To-Date October 31, 2025**

	AMOUNT	BUDGET AMOUNT	AMOUNT OVER BUDGET	% OF BUDGET
Ordinary Income/Expense				
Income				
4700 - Rental Income	\$226,693.14	\$222,000.00	\$4,693.14	102.11%
Total - Income	\$226,693.14	\$222,000.00	\$4,693.14	102.11%
Gross Profit	\$226,693.14	\$222,000.00	\$4,693.14	102.11%
Expense				
7150 - Depreciation and Amortization	\$166,214.61	\$171,000.00	(\$4,785.39)	97.20%
7400 - Occupancy	\$14,190.76	\$26,000.00	(\$11,809.24)	54.58%
7900 - Other Operating Expense	\$16,365.61	\$15,000.00	\$1,365.61	109.10%
Total - Expense	\$196,770.98	\$212,000.00	(\$15,229.02)	92.82%
Net Ordinary Income	\$29,922.16	\$10,000.00	\$19,922.16	299.22%
Other Income and Expenses				
Other Income				
9000 - Other Income				
9010 - Interest Income	\$18,505.19	\$18,000.00	\$505.19	102.81%
9020 - Investment Income	\$119,024.56	\$100,000.00	\$19,024.56	119.02%
9030 - Unrealized Gain (Loss) on Investments	\$635,134.64	\$0.00	\$635,134.64	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	\$782,703.39	\$118,000.00	\$664,703.39	663.31%
Total - Other Income	\$782,703.39	\$118,000.00	\$664,703.39	663.31%
Net Other Income	\$782,703.39	\$118,000.00	\$664,703.39	663.31%
Net Income	\$812,625.55	\$128,000.00	\$684,625.55	634.86%

San Luis Valley Behavioral Health Group
Cash Position

	11/19/25	10/21/25	Variance	9/30/2025	06/30/25	03/31/25	12/31/24
Asset Mgmt Corp - Operating Cash	\$ 980,112	\$ 820,077	\$ 160,035	\$ 856,001	\$ 883,349	\$ 1,161,222	\$ 1,466,209
CMHC - Operating Cash	\$ 4,278,078	\$ 3,270,701	\$ 1,007,377	\$ 3,876,848	\$ 3,193,411	\$ 3,377,977	\$ 3,442,412
Total Operating Cash	\$ 5,258,190	\$ 4,090,778	\$ 1,167,412	\$ 4,732,849	\$ 4,076,760	\$ 4,539,199	\$ 4,908,621
SLV Federal Money Market Account	\$ 286,702	\$ 286,605	\$ 97	\$ 286,605	\$ 286,316	\$ 286,030	\$ 285,749
LPL Financial - Asset Mgmt Corp	\$ 10,033,669	\$ 9,990,715	\$ 42,954	\$ 9,990,715	\$ 9,279,510	\$ 8,212,028	\$ 7,593,728
LPL Financial - CMHC	\$ 5,425,115	\$ 5,414,978	\$ 10,137	\$ 5,414,978	\$ 5,354,609	\$ 5,289,974	\$ 5,255,882
Total Long-Term Investments	\$ 15,745,486	\$ 15,370,426	\$ 53,188	\$ 15,692,298	\$ 14,920,435	\$ 13,788,032	\$ 13,135,359
Total Operating Cash / LT Investments	\$ 21,003,676	\$ 19,461,204	\$ 1,220,600	\$ 20,425,147	\$ 18,997,195	\$ 18,327,231	\$ 18,043,980
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	\$ 122,409	\$ 35,479	\$ 157,888	Interest Rate - 5.5%			
Principal Received	\$ 167,591	\$ 234,521	\$ 402,112				
Total Received	\$ 290,000	\$ 270,000	\$ 560,000				
Outstanding Loan Balance	\$ 832,409	\$ 115,479	\$ 947,888				

San Luis Valley Behavioral Health Group

Executive Committee

November 18, 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

Attendees: Pat Stanford, Mark Manzanares, Laurie Rivera, Victoria Romero, and Angie Gallegos

- Christmas Party-

Angie sent out the invite for the board Christmas party. It is December 18th from 5:00 pm to 7:00 pm at Nino's. Angie will find some fun activities to play. Being conscious of the budget, Leova, Jennifer, and Toni will not be in attendance this year.

- Vitoria's Evaluation-

Listening to the feedback she received, Victoria opted to use the narrative form for her evaluation. She and Angie have received test links and will test the assessment before sending it out to the full board. The timeline for completing the evaluation process is as follows: The board will complete the assessment by the end of November or the

beginning of December. The results report will be generated and sent to Pat by the beginning of January. The board will finalize Victoria's evaluation by the end of January. Victoria will also be doing a self-evaluation along with the board. She will ask BI to add a section where she lists one personal goal and four agency goals for the coming year. Next year, she will be asked to evaluate whether she met her goals and what stopped her from doing so.

- Communication Style Guide

Angie updated our style guide for 2025. The purpose of this guide was to standardize marketing materials and our branding. This was presented to all staff at our most recent huddle meeting and emailed to all staff. We will send a copy to all board members.

- Behavioral Health Technology Conference

Victoria, Kyle, Jana, and Tony R. attended the BHT conference. It is a valuable conference for our BI/IT team to attend annually. It was a valuable opportunity to discuss collaboration opportunities with other centers and to learn about new technologies that will impact the behavioral health landscape. Victoria and her team will have a written report for the board to read.

- Other

- Mark has some opportunities for Victoria and SLVBHG. First SimCare.AI is a platform that can be used to help train intern and practicum students. Victoria can create an account for free and test it out. If she thinks this would be beneficial to SLVBHG, Mark can put her in contact with the company. Second, ASU has an opportunity through the TIPS program to help SLVBHG solve an issue we are facing. IF there is interest, he can connect us with the facilitator of the program.



- Victoria was nominated to run for the regional representative for the National Council. She prepared all her necessary documents. The election takes place in April. She will have to commit 9 days a year to attend in-person meetings if she gets elected.
- We will prepare the conflict of interest form and board duties to be filled out at the next meeting.
- It was suggested to create a board meeting calendar that can be approved at the next annual meeting. Then, the board can decide if certain monthly meetings can be cancelled/postponed.

CEO Report

November 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 continue to meet with HCPF to discuss their request and how to fulfill it. Their request concerned the need to sustain oversight after the contract ends. We have made progress on meeting HCPF need and addressing HCI's concerns. The contract amendment is under final review and all parties are in agreement to sign once we are assured all close out activities are highlighted.

I am meeting biweekly with Carelon and HCPF.

I also meet biweekly with Carelon staff.

Health Care Policy and Finance (HCPF):

HCPF November Provider Association Newsletter- The latest provider newsletter highlights several important updates from HCPF, including enhancements to the Prescriber Tool and continued incentives under the Year 3 Alternative Payment Model to improve pharmacy benefit transparency and cost efficiency. Colorado's new M-REACH program, designed to support reentry services under the 1115 waiver, has adjusted implementation timelines to begin reimbursement for state-run facilities in January 2026 and local facilities in January 2027. As the CCBHC Planning Grant year concludes, state agencies are finalizing required activities, seeking a no-cost extension, and sharing updated memorandums, with the next steering committee meeting scheduled for January 2026. HCPF is also gathering feedback from primary care providers to expand eConsult use, while RAEs prepare to fully enforce claims-processing requirements to maintain federal compliance. Additionally, RAEs will implement prior authorization or retrospective review processes for outpatient psychotherapy exceeding 24 sessions to address utilization trends. Finally, the Colorado Attorney General's Office has announced two statewide opioid abatement funding opportunities totaling up to \$23 million for prevention, recovery, and infrastructure projects.

HCPF has officially submitted the state's RHTP Grant Application. The program, authorized under H.R. 1, will distribute \$50 billion in federal funds nationwide to strengthen rural health systems through innovation, workforce development, and care access. Colorado's application emphasizes home-grown workforce solutions, cross-sector partnerships, and technology-enabled care coordination. Stakeholder engagement remains active, with another meeting expected before year-end.

Behavioral Health Administration (BHA):

The Behavioral Health Administration (BHA) is entering the Joint Budget Committee (JBC) process and is committed to sharing transparent updates with partners as Colorado navigates a difficult fiscal year. To meet a required 2.5% general fund reduction for FY 2026–27, BHA has submitted four Decision Items focused on administrative efficiencies, eliminating duplicative programs, prioritizing sustainable funding aligned with the BHASO model, and right-sizing support for individuals transitioning from involuntary care—all designed to protect direct services whenever possible. With the Governor’s budget now released, BHA is preparing for two key December engagements with the JBC: the December 5 briefing and the December 16 hearing, where leadership will respond to committee questions and advocate for critical behavioral health priorities. BHA emphasizes partnership throughout this process and invites stakeholders to follow the presentations or reach out with questions.

Colorado Behavioral Health Council (CBHC):

CBHC FY 2026–27 Budget Request Briefing, Figure Setting Summary & Capitol Success Analysis- Governor Polis’ proposed FY 2026–27 state budget largely protects Colorado’s core behavioral health programs amid tightening fiscal conditions. While modest reductions target administrative and underutilized lines, the proposal maintains overall stability for the behavioral health safety net and Medicaid services. Key impacts for CBHC members, including the proposed elimination of the Mental Health First Aid and Disaster Behavioral Health programs, rate adjustments under HCPF, and the upcoming JBC hearing schedule.

Kara, Frank, and Veronica met with Erica Gannett, the BHA’s legislative liaison. Erica shared that the BHA feels strongly about accomplishing consolidation within the proposed budget structure. She confirmed the BHA is open to process recommendations, but they are firm on promoting a consolidated structure for larger funding lines and greater flexibility. They are interested in guardrails that ensure funding supports the greatest needs in the community, while avoiding siloed pots that make it difficult to distribute necessary funds to providers. This proposed structure will be presented as part of the BHA/HCPF briefing on December 5th, with an opportunity to further discuss it with the Joint Budget Committee. The group also touched on the BHA’s legislative priorities for the upcoming session, including modernizing prepaid wireless definitions to collect an estimated \$40 million in uncollected 911/988 fees, moving the oversight of recovery residences to the BHA, and creating flexibility through Certificate of Compliance reforms that would provide telehealth exemptions for outpatient-only BHEs.

Behavioral Health Planning and Advisory Council (BHPAC) Monthly Meeting - Frank attended a portion of the BHPAC meeting on Thursday where the Behavioral Health Administration (BHA) provided a focused update centered on its FY27 budget requests, emphasizing system “efficiencies and flexibilities” as the guiding themes for the year. Facing a constrained fiscal environment and a required 2.5% across-the-board reduction, the BHA described its approach as consolidating line items and redirecting administrative savings to preserve service delivery and local adaptability across Behavioral Health Administrative Service Organization (BHASO) regions.

- R-01: Administrative Reduction – Eliminating four FTE and roughly \$500K from the agency’s admin line, reflecting functions now managed by BHASOs.

- R-02: Third-Party Technical Assistance Repeal – Ending an external TA program for onboarding safety-net providers, with those functions now handled internally by BHA and BHASOs.
- R-03: Grant Program Repeal and Fund Realignment – Folding narrowly defined rural service grants into broader service-delivery lines to allow more flexible regional use.
- R-04: Care Coordination Line Right-Sizing – Adjusting a program supporting care placements and short-term commitments due to lower-than-expected caseloads, with coordination work now occurring appropriately at the provider level

BHA stressed that these changes aim to protect service access and regional problem-solving capacity rather than diminish frontline funding. The discussion also touched on budget process timing: the Governor’s proposal was submitted October 31, with JBC briefings and hearings running through winter before figure setting in early 2026. Overall, the meeting underscored the tension between fiscal restraint and system stabilization—but ended on a cautiously optimistic note, suggesting that recent administrative streamlining positions the BHA to weather reductions without compromising essential community services.

What we are hearing is that we will have a crisis of priorities and a crisis of moral, - We cut access to Medicaid or we Cut Programs. SLVBHG Leadership has met with Directors and Supervisors to discuss our strategies for impact and how we manage cost and production. We are examining program consolidation, along with other strategic initiatives.

CBHC leadership is continuing to meet monthly with HCPF and BHA Leadership

National Council Board Elections: To ensure that the National Council Board reflects the communities in which National Council members operate and that the discussions and decisions of the National Council Board are informed by broad and diverse inputs.

Increased communication and collaboration among all National Council members in all states in the region

Enhanced ability of all National Council members in all states in the region to have a presence of the National Council Board

Increased DEIB of states represented on the National Council Board (e.g., geography, age, disability, gender, race, ethnicity, expertise, experience, skills, size of agency, services provided/specialties, and setting)

Increased voter participation in regional elections

Regional leadership pipeline that is fueled with individuals who have been mentored to serve as the next generation of leaders

Sponsorships:

None

Previous sponsorships:

Tu Casa Starry Night Ball
Boys and Girls Club of SLV
Sacred Heart Church

Leadership Connections/Meetings:

- Behavioral Health Tech Conference Kyle, Victoria, Tony and Jana
- Rocky RAE monthly meetings
- SLV Region 18 Opioid Governance
- BHA/CBHC meeting
- CBHC Executive Committee

Upcoming Time Off/Travel:

Holiday time off

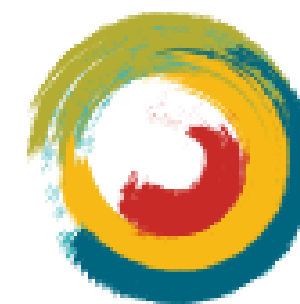
BHT Conference notes from the Team:

The conference was both informative and valuable, offering clear insight into industry challenges such as workforce shortages, technology adoption, and evolving Medicaid requirements. Staff found the discussions on licensure barriers, AI-driven tools, virtual supervision models, measurement gaps, and future innovations especially helpful. Attending sessions like this strengthens leadership by providing exposure to emerging trends, fostering strategic thinking, and connecting with peers who are navigating similar issues. It also introduces new ideas and technologies that can support problem-solving, improve efficiencies, and enhance the quality of care in behavioral health. The emphasis on having reliable data—and using it to guide business decisions, monitor outcomes, and support staff—was especially valuable. It also encouraged me to think differently about how I can help our teams use data more effectively, not just for reporting, but also for improving workflows and client care. Appreciated the panel-style format of many sessions. The interactive discussions offered more practical insight than traditional presentations. Several sessions on change management and supporting staff through new technology were also timely. In a period when we are asked to do more with less, there are clear opportunities to leverage technology to meet our goals more efficiently. Would welcome the chance to attend again and to participate in more hands-on conferences that showcase innovative solutions



Victoria Romero LPC, LAC is the CEO of San Luis Valley Behavioral Health Center, where she has been leading transformative mental health initiatives since 2001. With over 25 years of experience in behavioral health, Victoria is well-known for her compassionate leadership and thoughtful approaches to mental wellness. She earned her Master's in Community Counseling from Adams State University, where she developed a deep understanding of innovative therapeutic techniques and patient-centered care. Currently, she is pursuing a Master's of Business Administration (MBA).

Victoria is actively involved in multiple local and state initiatives, serving on committees focused on mental health policy reform and community well-being. Her commitment to advocacy and her visionary leadership have earned her recognition as a thought leader in the mental health field. Driven by a passion for inclusivity and accessibility, Victoria continues to champion initiatives that aim to dismantle stigma and enhance mental health services for all.



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



Communications/Style Guide 2025



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Introduction

These communications and branding guidelines have been established to help consistently market San Luis Valley Behavioral Health Group (SLVBHG), with “one voice,” both verbally and visually, to our stakeholders.

Stakeholders include, but are not limited to:

- Clients
- Partners/Vendors
- Media
- General Public
- New and potential employees
- Law enforcement
- Funders/Donors
- Human Service Agencies, Schools, Businesses

Clarity, consistency, and professionalism are essential to fulfilling our mission, upholding our values, and delivering the best possible care and services to our clients. Each board and staff member should be familiar with our agency communication to represent all of our services and accomplishments thoughtfully.

The words and images we use, how we describe our organization, and even the ways we pronounce and represent, orally and in writing, will either support – or detract from – its identity and its recognition. A successful branding program will be multidimensional, emphasizing the total customer experience at every touch point in the agency.

What is Branding

Our “brand” is the impression formed by our stakeholders about San Luis Valley Behavioral Health Group (SLVBHG) at every point of contact with our company. It is a collection of perceptions in the minds of those with whom we do business. Branding is the combination of imagery and content - everything that comes in contact with a stakeholder, such as brochures, direct mail, social media, advertisements, presentations, e-mails, signs, health fairs, clinicians, how we answer the phone, our physical office spaces, etc., and helps to form an opinion of SLVBHG.

Stakeholders should recognize our logo and easily understand what we do and who we are. Taglines, when necessary, need to define our services further and appeal to stakeholders’ needs. Our imagery, which includes our logo as well as photos and colors, will have a significant impact on how customers will perceive our brand.

What is a Style Guide

A style guide is a set of standards for the writing and design of documents, either for general use or for a specific publication, organization or field. The implementation of a style guide provides uniformity in style and formatting of a document.

Communications/Marketing Contact Information



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Executive Administrative Manager

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Communications Philosophy

San Luis Valley Behavioral Health Group is extensive and sometimes complex. Because it has much to offer (in the way of services), has many different customers i.e., consumers, funders, agencies – and because our organizational messages compete with a myriad of other messages in the minds of our constituents – our organizational philosophy and mandates concerning communications are as follows.

All communications must be:

- Consistent with our organizational mission and our strategic goals
- Goal-directed, effective
- Simple, Accurate
- Timely: Proactive, Responsive
- Systemic, dynamic
- Appropriate and respectful of individuals' (senders/receivers) time
- First person language
- Understandable: Refrain from using acronyms as much as possible in speaking or writing

Use of Name

The legal name of our agency is San Luis Valley Community Mental Health Center, dba San Luis Valley Behavioral Health Group. Each word is capitalized.

Approved Abbreviations/Shortened versions:

- San Luis Valley Behavioral Health Group
- SLV Behavioral Health Group
- SLVBHG if it has been written out in the document beforehand i.e., SLV Behavioral Health Group (SLVBHG)

*Never use the name in any other capacity, or use punctuation (hyphens, slashes, etc.) within the name. If the legal name needs to be used, use it in its entirety.

Vision, Mission, and Values

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: SLVBHG is an employer of choice where individuals can build fulfilling and lasting careers. They are well-supported and informed and are kept from working in isolation. They organization is committed to delivering high quality, client-centered services with the help of highly competent team members. SLVBHG values transparency and inclusivity in all aspects of decision-making and goal-setting throughout the organization to benefit all clients and community members.

ACTIVISM: SLVBHG is a leader by action and example.

ETHICAL PRACTICES: SLVBHG is a reliable source of information and a trusted partner and provider, internally for employees and externally in the community.

INNOVATION: SLVBHG is a cohesive organization with intersection and collaboration between all departments.

DIVERSITY: SLVBHG believes in treating all its employees and clients with dignity and respect, and it is committed to promoting justice, equity, diversity, and inclusion throughout the organization

Communication Points Regarding SLVBHG

- We served a total of 3664 clients in fiscal year 2024-2025. Our clients represent all six counties of the San Luis Valley. We see clients of all age ranges and have a diverse representation of diagnoses that we treat. Our clients are almost 50% male and 50% female.
- Our clients have many different types of insurance or payer sources. Almost 62% of our population has “traditional” Medicaid coverage. In addition, 6.5% of our clients have other types of Medicaid funding (known as Fee For Service). Another large portion of our population – approximately 12%- is considered “self-pay” and receives our services by paying for them using our sliding fee scale, which is based on federal poverty standards. We also have contracts and grants that help cover the costs of services. It is our policy not to turn any clients away regardless of their ability to pay for services.
- Our staff of highly trained and qualified individuals serves clients daily with a myriad of diagnoses and needs. We not only “treat” the mental illness of our clients, but also look at the other factors in their lives that are impacting their quality of life.
- We have a \$12 million operating budget
- SLV Behavioral Health employs over 140 employees
- We have nine clinic locations where clinical services are provided.

Elevator Speech

Boilerplate” is common wording we use to explain who we are and what we do (our elevator speech).

The following paragraphs are used extensively – on our Website, on the back of business cards, as introductory paragraphs to grant requests, and in many other ways. Please familiarize yourself with this wording.

- The San Luis Valley Behavioral Health Group inspires hope, healing, and well-being for the citizens of the San Luis Valley.
- We have built our system to ensure the survival and vitality of mental health services in the San Luis Valley during our organization's history. Over the last 50+ years, we have continued to develop new programs and services to increase clinical quality and improve service and efficiency.
- We share skills and resources with other agencies in the San Luis Valley and the State of Colorado to build stronger programming and alliances.
- The San Luis Valley Behavioral Health Group (SLVBHG) is committed to offering a comprehensive array of valuable services, including prevention, intervention programs for mental health outpatient, addiction treatment services, and judicial and offender services.

The terms ‘behavioral health’ and ‘mental health’ can be used interchangeably; however, behavioral health is more commonly used to include both substance abuse and mental health issues.

FAQs

When was SLVBHG founded?

- Founded in 1972

How many locations are there?

- 9 facilities in Alamosa, Monte Vista, Center, La Jara, Antonito, San Luis, Del Norte, Fort Garland, and South Fork. We also have the New Beginnings Center, the Mi Esperanza Wellness Center, and several rentals.

Service summary

Services to enrolled clients may include any of the following:

- 24-hour crisis response
- Brief interventions
- Case management
- Psychiatric and medical services
- Individual, family, and group therapy
- Child and family programming
- School-based services
- Adolescent services
- Substance abuse services
- Services for veterans
- Housing services
- Education and training opportunities

Other Things to Remember

At SLVBHG, we refer to individuals served as individuals, consumers, clients, and patients when working with medical staff.

Programs

When communicating about programs of SLV Behavioral Health Group:

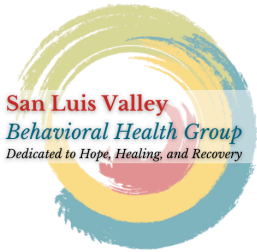
When you describe a program, service, or other acronym, please spell out the acronym first, and then put the abbreviation in parentheses to reference it again in the article. Example: Medication-assisted treatment (MAT), in combination with counseling and behavioral therapies, provides a “whole-patient” approach to the treatment of substance use.

Please always ensure that the program is part of SLV Behavioral Health Group. Example: MAT is available at SLV Behavioral Health Group.

Our Logo

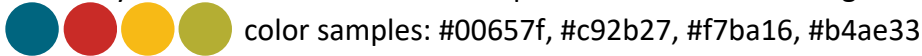
Our logo is the very basis for our brand awareness, and therefore, it must be crafted and grown very carefully to preserve the integrity of our reputation. All programs and initiatives are to be clearly branded with the SLVBHG logo unless an individual logo has been designed and approved by **Victoria Romero, CEO**.

There are 3 approved variations of the logo:



Colors

Our logo features four partial circles- in blue, red, yellow, and green. These partial circles convey our organization's "diversity of health care". The colors represent our southwest region.



All SLVBHG logos may be used in one of four formats:

- Full Color-preferred usage
- Black and gray- preferred usage if color reproduction is not available
- Black and white normal- okay to use if reproduction is not available
- Black and white reverse- okay to use when logo must be placed over another color or image and full color is too "busy"

*Any other colors must be approved by the communications department. Special events may warrant consideration i.e., pink logo for breast cancer.

Placement

The logo may be placed in the upper corner or lower corners. The logo may be centered as long as the image is enlarged keeping the integrity.

***Do not stretch out the logo**

Logo Files

To use any variation of the logo, request the JPEG or PNG file from the Communications/Marketing department.

Approval of Logo Usage

All requests for use of the logo on promotional items (stress balls, pens, etc.) brochures or materials of any kind to promote our services or our image must be facilitated through the Communications/Marketing department.

In the instance that SLVBHG collaborates with other businesses or sponsors events, please get in touch with the Communications/Marketing department to determine the correct logo to use. The Marketing department should also be made aware of the purpose of these uses. (Examples: Fun run, event sponsorships, materials associated with these types of events.)

Fonts and Typography

Preferred fonts for general communication purposes:

Try to use a 12pt business-like font in black.

Examples:

- Times New Roman
- Arial
- Calibri
- Tahoma
- Aptos

These fonts have been chosen because they are generally available on all Network computers. Don't underestimate the importance of consistency of font in all letters/correspondence. It may seem like a small thing, but it is an important part of our overall branding efforts.

Typographic Suggestions for business/professional use:

- Avoid all capital letters.
- Numbers: Follow Associated Press standards on when to use numerals and words. In general, spell out numbers one through nine and use numerals for 10 and above.
- Use one space following periods — not two.
- Use two paragraph returns [8] among paragraphs — not indentation.
- Use hyphens and em dashes correctly: Hyphens connect words (mental health-related); Em dashes are used for ranges (6 – 7 p.m.); Em dashes are used for pauses in thought — like this.

Readability

Keep sentences and paragraphs brief. Utilize Flesch-Kincaid Readability Index to improve readability.

Photography and Images

Photos & Original Client Artwork

Stock photos are most often best used on marketing materials that promote our programs and services. Every effort must be made to choose images that are ethnically appropriate to the clients we serve and/or to the program/services being marketed.

- **Clients must sign a photo release in order for their likeness or artwork to be used in any marketing material. Contact the Communications department to obtain this form. All releases must be signed prior to usage and a copy given to the Communications Team. If a client is under the age of 18, a parent or guardian must sign.**

Staff Photos

The Communications/Marketing department will organize professional headshot photos to be taken for clinicians and leadership. Staff may also be photographed at agency-related events.

- These photos may be used for internal communications, such as newsletters and presentations, or external promotional materials, including social media, the company website, and marketing brochures.
- Employees have the right to request the removal of their photographs from any platform or publication without facing any repercussions.

Collateral Materials

The Communications/Marketing department should create or assist in the creation of all internal and external collateral materials.

Internal marketing materials (flyers, notices, closures, etc.) are used to announce information to SLVBHG staff and current clients. These materials are to be approved by the Communications/Marketing department.

External marketing materials (newsletters, annual reports, invitations) that are targeted toward the general public are to be designed by the Communications/Marketing department.

***All marketing materials should be presented in the best possible reproduction. Photocopies of photocopies or photocopies of original materials are not appropriate.**

Languages

All collateral materials will be written in English as the primary language. Translation into other languages will be determined based on the target audience. If a single document is needed in both English and Spanish, the Spanish translation must be equivalent in size, placement, and tone to the English version. Translations must occur through a professional service or with bilingual staff as necessary (internal, simple materials like Do Not Disturb door hangers).

***Please always check with the Communications & Marketing Department before you distribute any information/materials about SLV Behavioral Health Group.**

Fact Sheets, Flyers, and Brochures

Overall Agency Fact Sheets, Flyers, or Brochures

The Communications/Marketing team will be responsible for creating general all-agency fact sheets, flyers, or brochures. These items are designed for employees to use as a basis of information about SLVBHG and as a leave-behind at important meetings, as a take-away piece for people who have been screened at health fairs and may require our services. They will also be used at education events and other public tabling opportunities. Materials are available from the Communications/Marketing department.

Specific Program/Department Fact Sheets, Flyers, or Brochures

The Communications/Marketing department encourages staff to reach out to the department for requests to create or design program/department-specific fact sheets, flyers, or brochures. Requests should include the program name and any other important information.

Staff are allowed to design their own specific program/department fact sheets, flyers, or brochures. However, they must adhere to the guidelines defined by the Communications/Marketing department (see checklist).

***Any staff-designed specific program/department fact sheets, flyers, or brochures intended for external use must be approved by the Communications/Marketing department.**

Other Marketing Materials

SWAG Items

The Communications/Marketing department will be responsible for designing and ordering promotional “SWAG” items. Staff can request these items to give out at community/public events. Any request for specialty items need to be approved by the Communications/Marketing department.

Curriculum, Work Books and Guides

Production and content of all manuals or booklets containing original SLVBHG information must be coordinated with the Communications & Marketing department. It is important that all materials in this form follow the communications and branding guidelines in this document, including, but not limited to appropriate logo usage and person-first language.

Signs

All interior and exterior building signs, as well as directional signs, are to be designed in collaboration with the Marketing & Communications department.

Testimonials/Stories

Client success stories must be collected with complete respect to privacy and using appropriate channels, i.e. the client’s behavioral health provider. ALL testimonials and images of clients must have signed, written consent. The Communications & Marketing Department will provide a form upon request. The original form or a copy must be housed in the Communications & Marketing Department.

Videos

Video planning, scripting, and production must be facilitated in collaboration with the Communications and Marketing Department.

Events

Please get in touch with the Communications/Marketing Department when planning an event related to any program or location. If needed, the department can assist with planning and promoting the activity, including invitations, public relations, guest speakers, agendas, catering, and logistics.

Presentations (PowerPoint)

PowerPoint presentations should be prepared using our approved checklist, which can be provided to you by the Communications & Marketing Department. Any PowerPoint to be presented to the public should be reviewed by your supervisor and the Communications/Marketing Department.

Guidelines:

- Always use a legible font size (to the audience!).
- Don’t crowd words or lines.
- Preview your presentation from the perspective of the audience being presented to.
- Refrain from using acronyms as much as possible in speaking or writing.
- Text may not overlap or obscure the SLVBHG logo on any slide.

Website

The purpose of the SLVBHG website is to provide the public with access to information and resources. Please feel free to forward all requests, edits, and suggestions to the Communications/Marketing department.

Social Media

The Communications/Marketing department is responsible for monitoring and updating agency social media content across all platforms. No new agency social media profile must be set up without the consent of the Communications/Marketing Department.

Social media for the purposes of this manual includes:

- Website
- Blogs/chats
- Facebook, Twitter, LinkedIn, etc.
- Discussion forums and posted comments
- Podcasts or videos
- Photo sharing online

Social Media Policy

The purpose of social media communication guidelines is to provide direction on the appropriate and professional use of a media tool that crosses both professional and personal boundaries. All conversations and exchanges regarding SLVBHG must be conducted in accordance with the organization's mission and values, as well as its marketing, branding, communication, and language policies outlined in this manual.

Our agency's objectives in using social media:

- To translate science and research for the public
- Improve behavioral health literacy
- Reduce stigma and discrimination about behavioral health/ mental illness and treatment
- Become a trusted source of information about issues in behavioral health
- Create positive awareness of SLVBHG and increase involvement in our public programs and events
- Increase community awareness of the expertise of our providers and services

*Employees should refer to the Employee Handbook for appropriate and inappropriate use of social media and email in daily work, particularly HIPAA regulations and work time spent on such sites.

Provisions

All staff are invited and encouraged to participate in SLVBHG's social media venues, but they must adhere to the professional rules and restrictions outlined in the Employee Handbook.

Social media guidelines apply to employees who use social media at work, for work purposes, or while away from the office when the affiliation with SLVBHG is identified, known, or perceived.

Prior permission must be obtained when employees communicate on a personal level and mention their SLVBHG affiliation, whether during or after work hours. This includes political affiliations, guest commentary, and personal blogging.

All employees participating in social media conversations are expected to maintain a professional tone, even when in disagreement with a particular post or opinion. Employees are expected to work with the Communications/Marketing department to address misinformation (by other users), including defamatory language or images, in a prompt and professional manner. Report misuse immediately to the Communications/Marketing department for review and further action. If a client or patient posts or comments, SLVBHG employees may not respond unless working with the communications department. Employees may not accept "friend" requests from any current client (on their caseload).

Letterhead and Correspondence

All letters and outgoing correspondence should be on official SLVBHG letterhead.

All outgoing faxes should contain a fax cover sheet.

Hardcopy and electronic versions of official SLVBHG letterhead and fax sheets are available in the Communications/Marketing department.

Business Cards

Business cards are ordered for each staff person at the beginning of their employment and reordered as needed after that. Customer Support Staff will create the template according to the style below and order copies for staff.



Please discuss with your supervisor whether it makes sense to have your cell phone or any other information added to your business card.

Voicemail Scripts

The following are voicemail scripts and instructions – from either within, or outside, our organization.

- Business phone and Cell Phone:
 - a. Hello, you have reached (your name) at San Luis Valley Behavioral Health Group. Please press the pound (#) key at any time to skip this greeting and leave a message.
 - b. I'm sorry I'm unable to take your call. Please leave a message, including your name and phone number, after the tone and I'll return your call by the end of the next business day. If this is a life-threatening emergency, please call 9-1-1. If this is a mental health crisis, please call 719-589-3671 and ask for emergency services. Thank you.
 - c. Please hit 0 for the front desk.

Some staff may not need to include the emergency portion of the message. Please discuss with your supervisor.

If you are on vacation please modify your message and leave the dates that you will be out and who they can contact while you are out.

Email Signatures

Email Signatures are the portion of your email that appears at the end of a message and contains your name and contact information. All staff should use the same information:

Name

Title

Phone number/extension and cell number when appropriate

San Luis Valley Behavioral Health Group

Address/Location (you can put your primary address, if you work out of an outlying office i.e. 402 4th Ave, Monte Vista, CO 81144)

add-ons:

if appropriate, you can also include

- For Emergencies call 719.589.3671
- 📞 **988 – Colorado Mental Health Line**
For 24/7 support with mental health, emotional distress, or substance use
- www.slvbhg.org
- tag line (Dedicated to Hope, Healing and Recovery) or our logo

Example:

Angie Gallegos, MBA

Executive Administrative Manager

San Luis Valley Behavioral Health Group

Alamosa, CO 81101

(719) 587-5655

📞 **988 – Colorado Mental Health Line**

For 24/7 support with mental health, emotional distress, or substance use



Do not include dark colors, patterned backgrounds, images, symbols, animated GIFs, or other distracting elements. Instead, use business fonts and colors.

For internal e-mails, replies, and forwards, use the same style. The signature may be minimized for these uses, but must at least include name, title, and phone number.

Angie Gallegos, MBA

Executive Administrative Manager

(719) 587-5655

Email Etiquette

The people you include in the “To” field should be the people you expect to read and respond to the message. The “CC” field should be used sparingly. You should only CC people who have a need to stay in the know. When cc’d on an email you are not expected to reply.

- Reply to all -- only when necessary. **Never Reply to All to an All Staff email.**
- We have created group emails for your use. You can request a group email be created with consultation from supervisors.
- Please do not use the all-staff e-mail group– unless authorized by the Communications team or an Officer/Director. The Communications team will review and approve all staff e-mails within 48 hours if they are asked to review.

We have asked staff to identify in the subject line of an email whether an email is:

- FYI:
- Action Needed:
- Response Needed:
- Urgent and add the additional email sign (!)

Please keep the message to one subject and be specific in the subject line (this will make it easier to scan for messages you need and will result in a faster response).

Please use the urgent (!) on the email only when it needs action immediately. Please use it when you need it.

Guidelines:

- Keep e-mails brief and to the point.
- Try to avoid attaching large files. (Instead, share large files via network drives or links when possible).
- Be mindful of your tone. The more matter-of-fact the better since the reader does not have the benefit of your pitch, tone inflection or other non-verbal cues.
- E-mail is a great way to commend or praise someone. It is not an appropriate medium for criticism.
- When you find yourself angry or upset please restrain from sending an email right away.

Media Protocol and Interviews

The Marketing/Communications Department is the main point of contact for the media. All press releases will come from this office, and all media calls received should be directed to either the CEO, CCO, CPO, or Marketing/Communications Department. The request will be assessed to determine IF and WHO will be interviewed as the spokesperson for SLVBHG.

Protocol is provided below.

If an employee receives a call from the media:

- Be responsive and polite. Say, “I’m sorry, but by organizational policy, I am unable to comment, but I will promptly put you in contact with people who can. Let me facilitate that for you.” In any case, do not comment. Do get as much information as you can about the request, and repeat the phone number!
- Call the Marketing/Communications Department immediately, using cell phones if necessary. If not available, any member of the senior management team (Chief Operating Officer, Chief Executive Officer, Clinical Director) should be contacted.
- Forward all info and be on standby for an interview, once coached, if appropriate. The Marketing/Communications Department will help prepare the spokesperson for the interview and do all follow up communication with the reporter.
- Do this immediately, as we are likely to lose a publicity opportunity (and future opportunities, due to slow response time).

*Note that potentially harmful stories are best dealt with immediately.

Media Policy - When are You YOU and When are You an SLVBHG Representative?

1. You are an SLVBHG representative when interviewed by the media in coordination with the Communications/Marketing Department. In this role, YOU are assumed to be, and therefore must speak as, a representative of the agency.
2. You are an SLVBHG representative if you are interviewed or submit an article or opinion that requires the disclosure of your employment with SLVBHG. You’ll need to notify the Marketing/Communications Department BEFORE submitting commentary and keep the Marketing/Communications Department in the loop as publication and public commentary occur.
3. You are NOT a representative of SLVBHG when interviewed for non-network issues (“man on the street” or at a sporting event, for example) and are expected to maintain the boundary of speaking as an individual, private citizen. This separation is especially important for letters to the editor or guest columns.

***When in doubt, contact the Communication & Marketing Department for guidance!**

San Luis Valley Community Mental Health Center Board Meeting

November 25, 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- December 18, 2025
- 7) Adjournment

San Luis Valley Community Mental Health Center

October 28, 2025

**SLVBHG Board
Room**

Member Present: Mark Manzanares, Laurie Rivera, Jerry Gallegos, Louise Sanchez, George Wilkinson, Olivia How, and Victoria Romero

Members Excused: Pat Stanford and Jody Kern

Staff Present: Kyle Turnwall and Angie Gallegos

1. Roll Call/Declaration of Quorum

2. Approval of Agenda

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

3. Approval of Minutes

It was M/S by Laurie Rivera and Olivia How to approve the minutes dated September 30, 2025. 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 November 25, 2025.

7. Adjournment

The meeting was adjourned at 7:19 pm.