



Managing Change in Community Behavioral Health Organizations

Presented by: Mindy Klowden, MNM,
Managing Director for Behavioral Health
Victoria Romero, LPC, LAC
CEO, San Luis Valley Behavioral Health Group

About Us

Third Horizon Strategies is a boutique advisory firm focused on shaping a future system that actualizes a sustainable culture of health nationwide. The firm offers a 360° view of complex challenges across three horizons – past, present, and future– to help industry leaders and policymakers interpret signals and trends; design integrated systems; and enact changes so that all communities, families, and individuals can thrive. Learn more at www.thirdhorizonstrategies.com.



Key Takeaways



Effective change management starts with strong communication

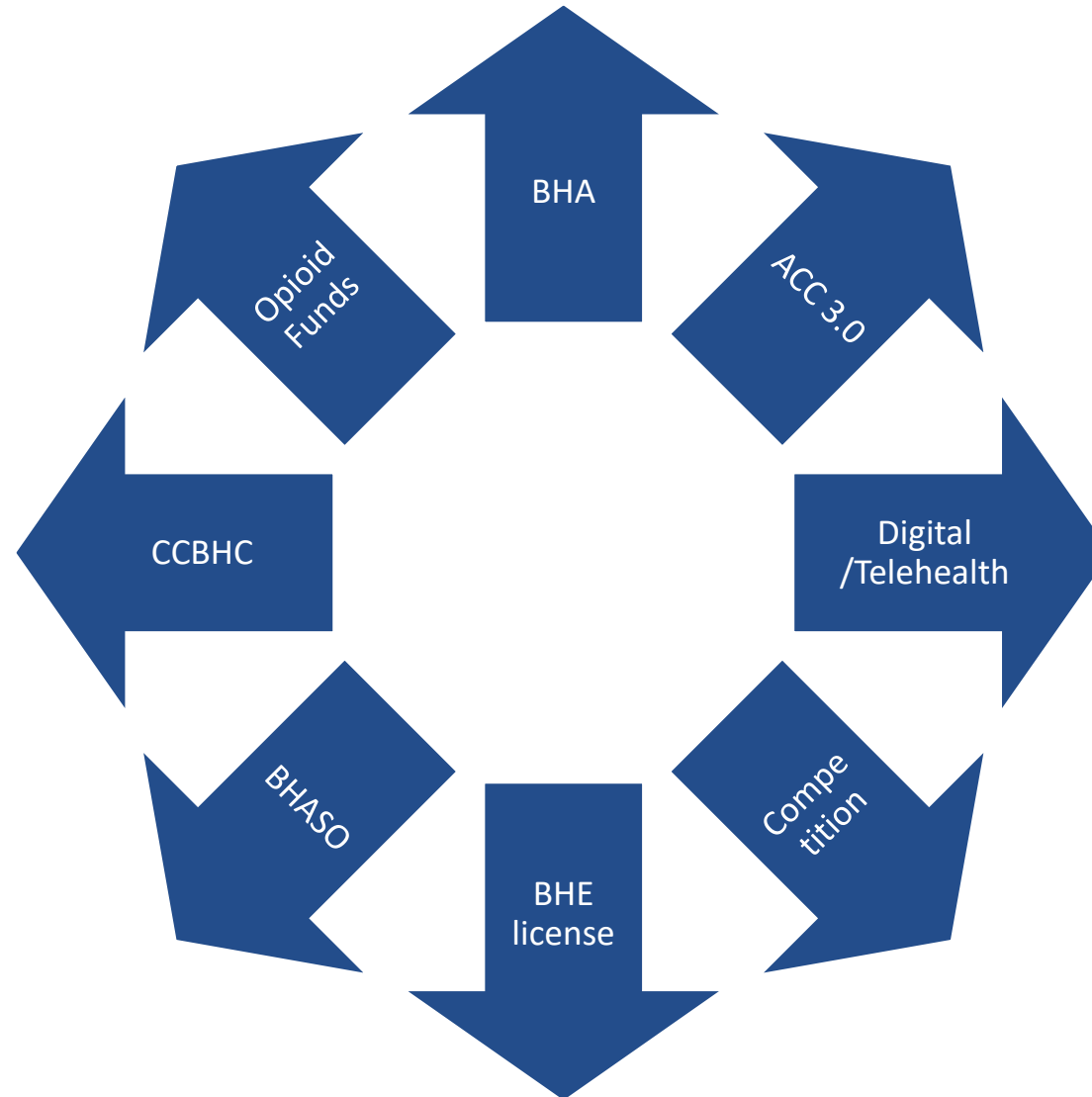


There are best practices every organization can adapt and follow



Behavioral health providers have unique skills and competencies that can be applied in new ways to support change management

The Behavioral Health Landscape is Ever Changing



Effective change management starts with strong communication



Why is Change Hard?

People **Don't Feel Ready**

The status quo is comfortable

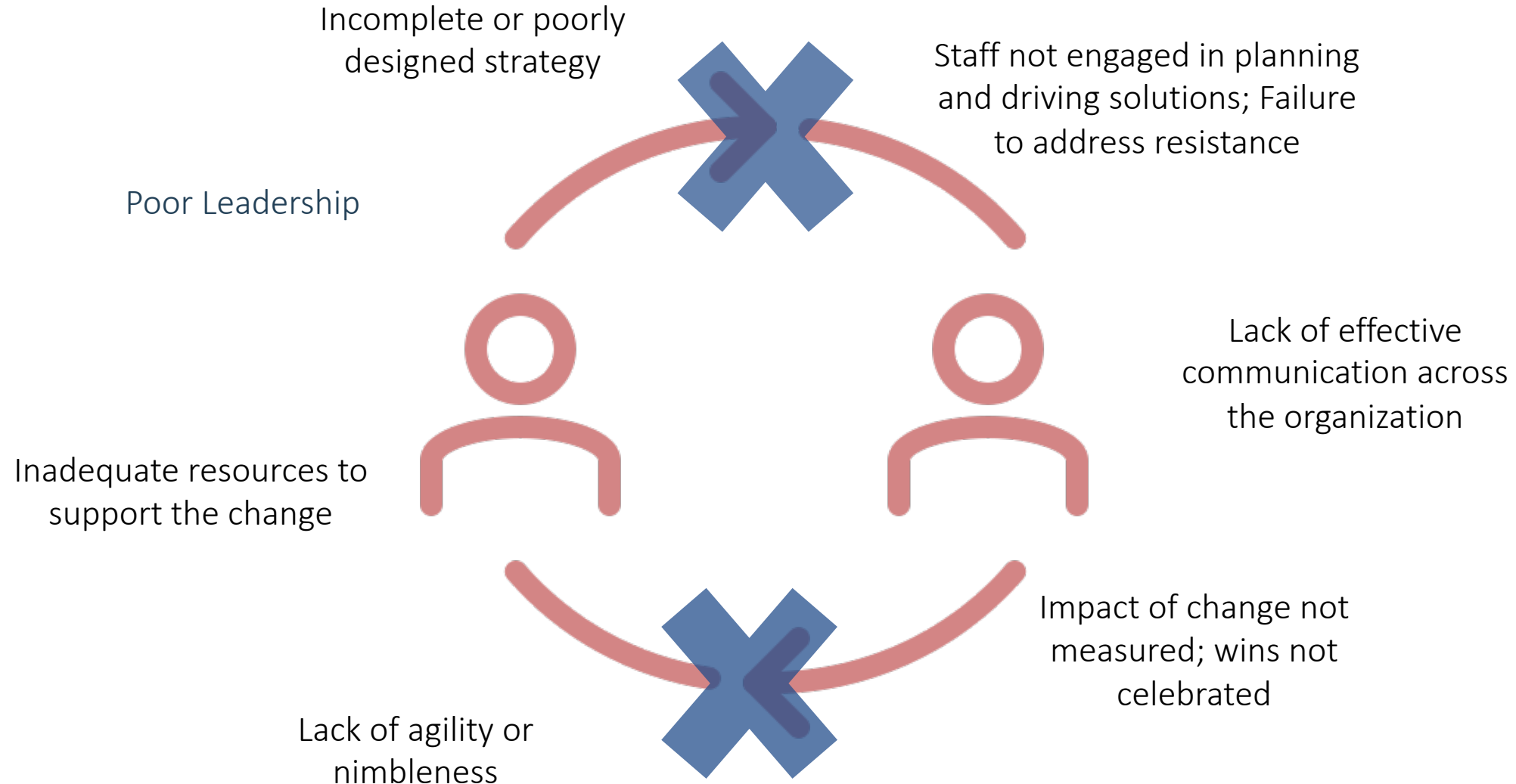
People **Don't Understand**

The benefits, or risks, leading up to the change may not have been well communicated

People Have **Fatigue**

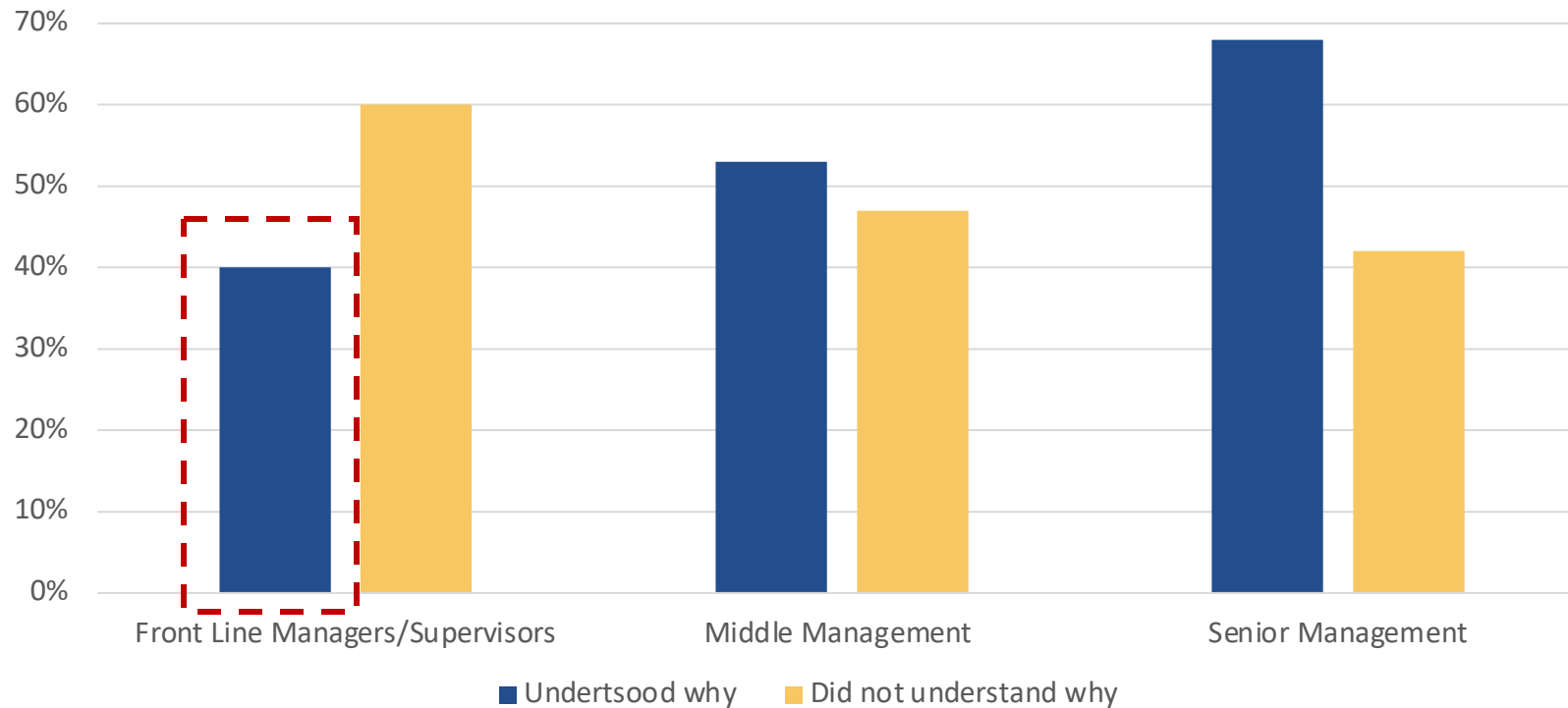
Changing too many things at once, or being required to change by external forces can be exhausting

Why Does Change Management Fail?

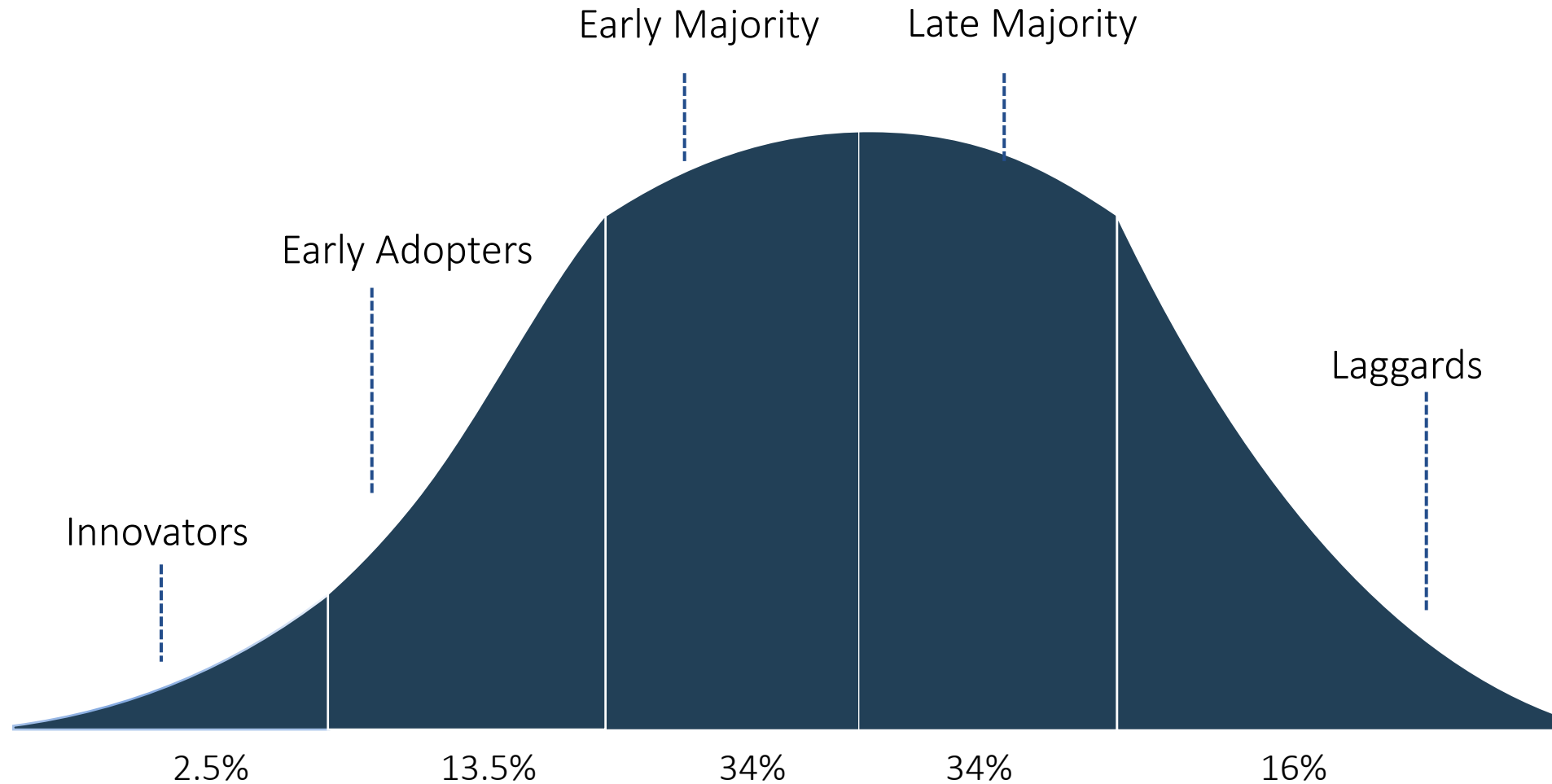


Why Does Change Management Fail?

Research by [Towers Watson](#) found that only 40% of front-line managers understood why organizational changes were happening




Adopter Categories to Change



Innovation Adoption Life Cycle

Communication Best Practices



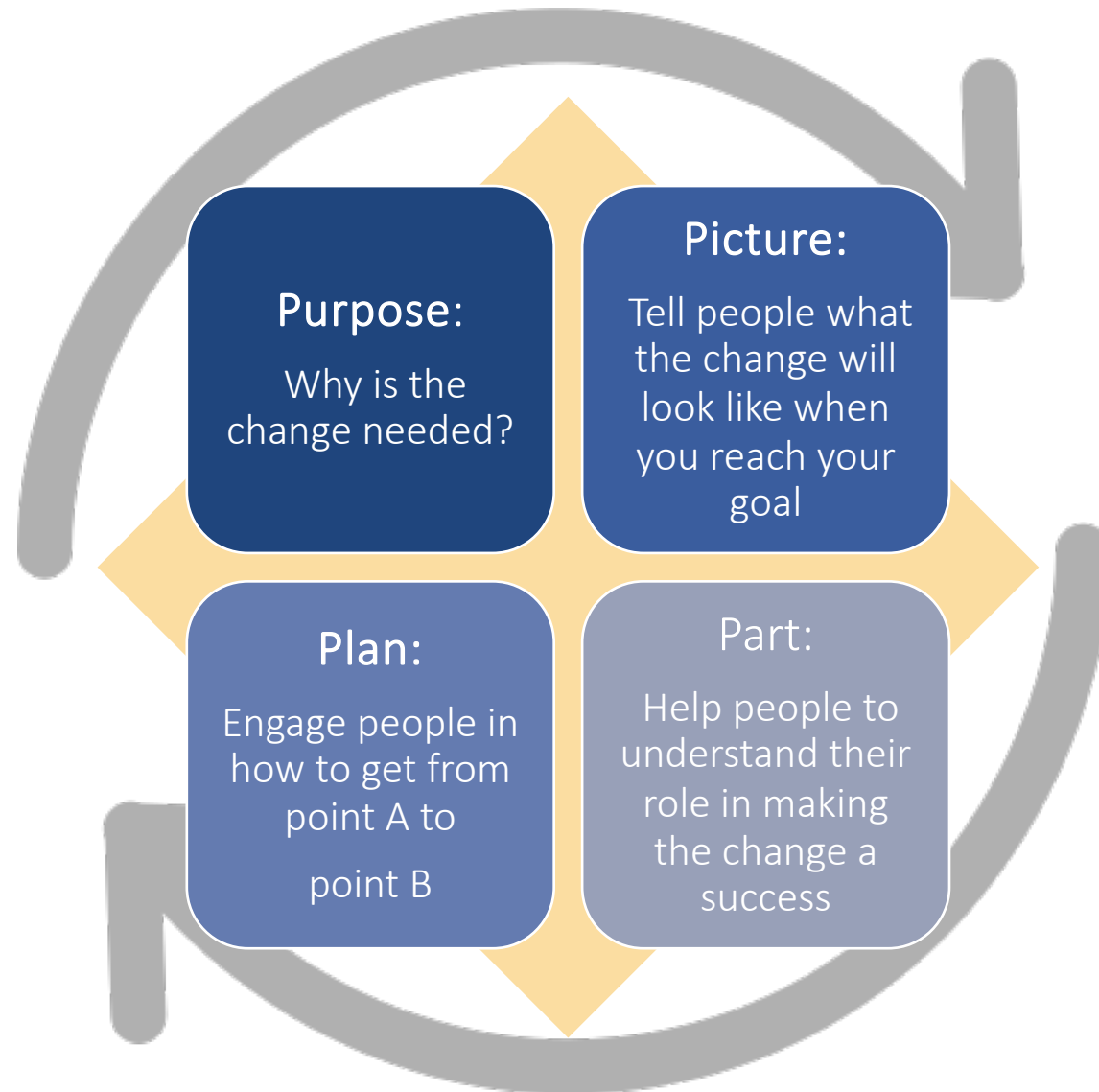
You cannot
over-
communicate

- Communicate consistently, frequently, and through multiple channels
- Share what is known and what is not yet known
- Provide ample time and space for questions and discussion
 - Leaders need to LISTEN

Bottom Line for most staff:

How does this impact **me**? How does this impact **the people we serve**?

The 4 Ps of Change Communications



There are best practices every organization can adapt and follow




Apply a Structured Change Management Approach

An intentional and structured approach to managing change helps organizations stay on track.



It ensures adequate time for meaningful activities and allows space to identify and address gaps throughout the project lifecycle.



Using a formal approach also makes processes repeatable for the consistent application of change management on more/future organizational initiatives.

Case Study: XYZ Behavioral Health Center

Project Team

- Formed a merger/transition team that included executive leadership, middle managers, and staff, with representation from all departments
- Dedicated bi-weekly team meetings and periodic small group work sessions
- Created a web-based project plan with SMART goals, accessible to all participants
- Hired a lawyer to oversee legal aspects of merger

Communications and Culture Change

- Developed an FAQ and talking points
- Held “town hall” meetings, tours, and brown bag lunches
- Facilitated dialogues and activities to define organizational culture and shared values

Project Plan Areas

Project leadership

Organizational Culture Integration

Patient communications

Licensing and Compliance

External Communications

Legal

Finance and Billing

Governance

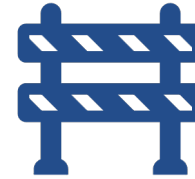
Human Resources

Health Information Technology

Kotter's Eight Steps



Create a sense of urgency



Enable and remove barriers



Build a coalition



Generate short term wins



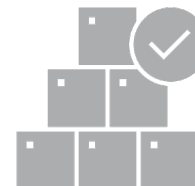
Form a strategic vision



Sustain acceleration



Enlist volunteers



Institutionalize change

Behavioral health providers have unique skills and competencies that can be applied in new ways to support change management

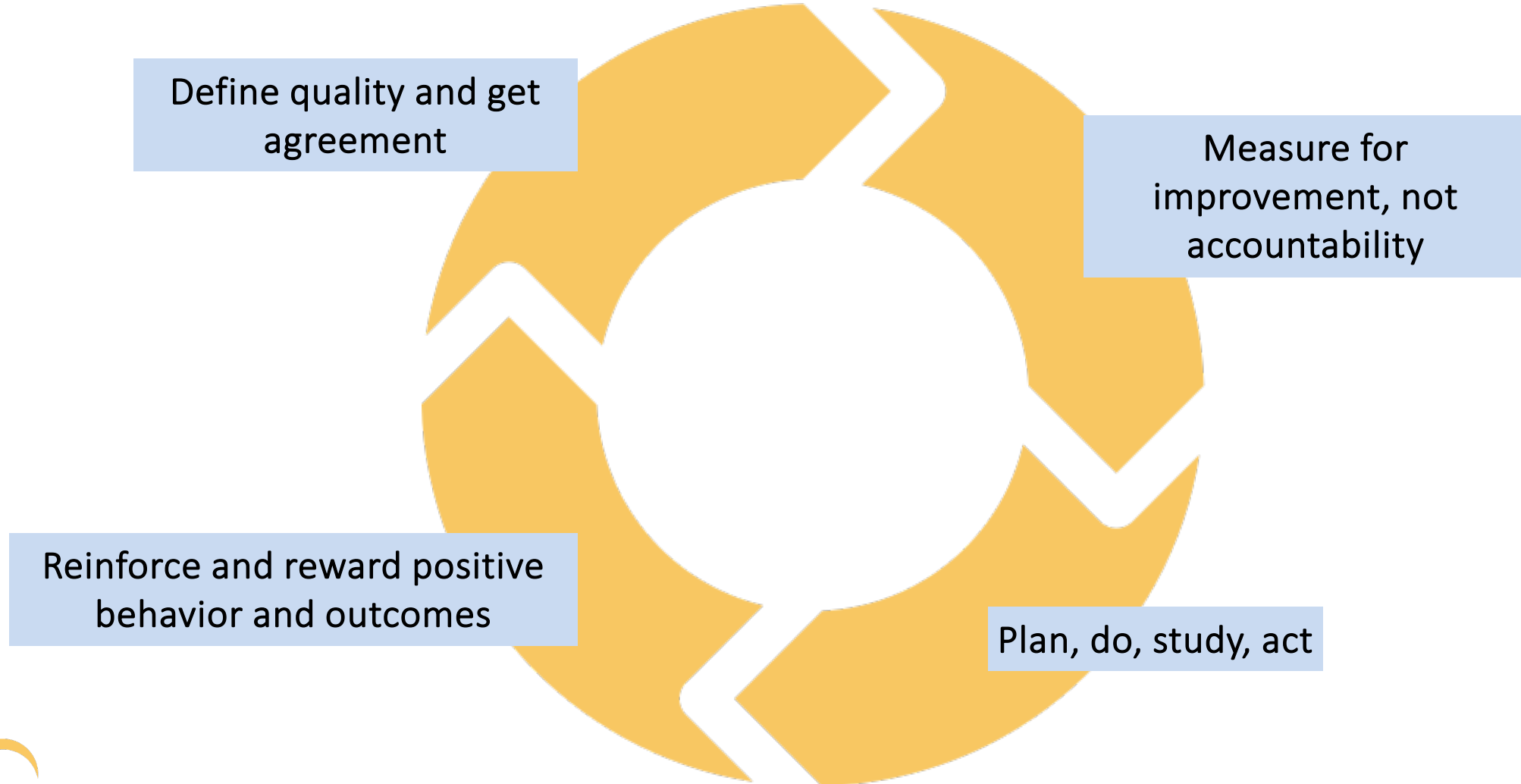


Applying Motivational Interviewing to Organizational Change Management



- Identify stages of readiness/stages of change
- Discover individual motivations
- Foster not only staff willingness to change, but **their confidence that change is possible**, and the outcome beneficial

Continuous Quality Improvement Principles to Sustaining Change



Case Study: San Luis Valley Behavioral Health Group

Change Management and Leadership Team Building

- SLVBHG has a relatively new CEO, Victoria Romero, who had previously served as the COO.
- Ms. Romero's vision is to build a cohesive and expanded leadership team who can then work in partnership with the SLVBHG's Board of Directors to engage in more forward-thinking strategic work that ensures the organization continues to meet its community's behavioral health needs while adapting to the changing health care landscape in Colorado.
- SLVBHG brought in THS to support change management, team building, and develop a strategic plan.



Introduction

Over 55 Years of Experience

The San Luis Valley Behavioral Health Group has a 55-year legacy of experience and expertise. We're celebrating our past while embracing change with a recent transformation. This presentation highlights the strategic change management principles guiding us toward a vibrant future.



Holistic Care Methods

At SLVBHG, we believe that true well-being encompasses the body, mind, and spirit. This section explores how our holistic approach to care has been an integral part of our change management process. By seamlessly integrating physical, psychological, and emotional support, we ensure that every individual receives comprehensive and personalized care that paves the way for lasting transformation.



A Legacy of Compassion and Dedication

Tracing Our Roots

Since our establishment over 55 years ago, the San Luis Valley Behavioral Health Group has been a cornerstone of support for our community. Beginning as a humble initiative, our organization has grown into a beacon of hope, providing essential mental health services and empowering countless lives. Our journey through the years is a testament to our unwavering commitment to improving mental health and well-being in the San Luis Valley region.

1970

Establishment Year

+5,000

Individuals Served on Average Annually

+15

Specialized programs and wide range of services



+10 Locations

With over 10 locations spread across the entire SLV and a Mobile MAT Unit, we meet our clients where they live, work, and play.



\$16,891,635

We reinvested \$16,891,635 into our mission last fiscal year (2021-2022).



Vision & Mission

Enriching Lives; Promoting Wellness

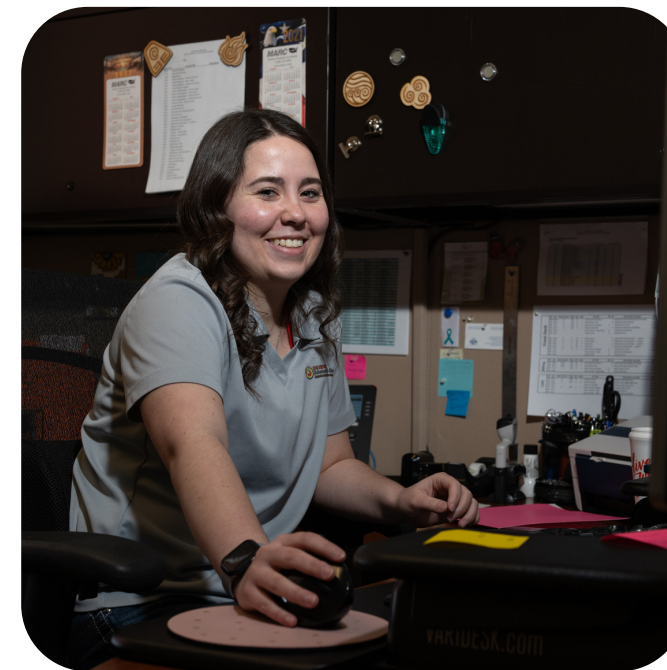
We are committed to enriching lives and fostering wellness through quality behavioral health services. Our goal is to make a positive difference in the lives of all we serve, with a profound respect for human dignity.

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.



Six Counties of Service

SLVBHG provides vital behavioral health services to six counties, including Alamosa, Conejos, Costilla, Saguache, Mineral, and Rio Grande. Our commitment to each community drives our mission to improve lives and promote resilience.

Progressive Pioneers

At SLVBHG, we utilize change to find innovative methods of meeting the needs of our community, including making services accessible, attracting and retaining talented and diverse staff, and fostering collaborative community partnerships.

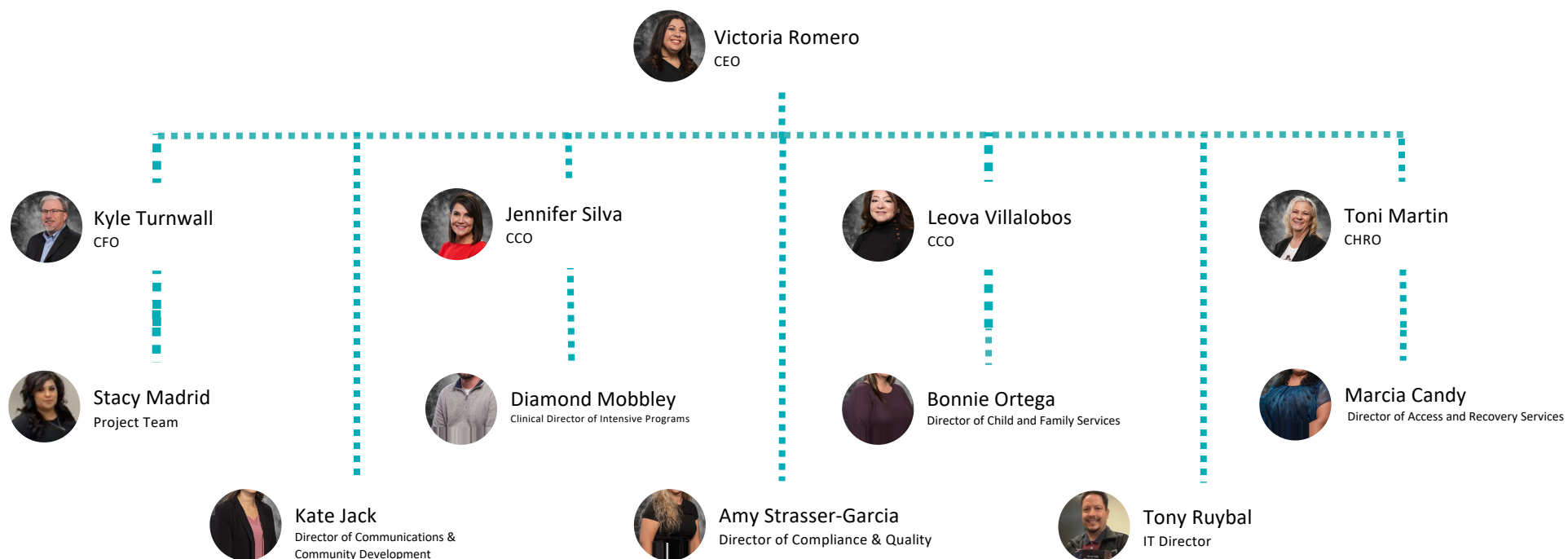


SLVBHG Gallery

Moments of Connection & Care

Step into our world of compassion, resilience, and transformation. This photo gallery offers a visual narrative of our collective efforts to uplift lives and promote well-being. Each snapshot captures the essence of our commitment – from empowering staff and community-focused initiatives to heartwarming community events.







Organizational Meetings and Leadership Structure

This [document](#) summarizes the key meetings within SLVBHG, highlighting their frequencies, purposes, and participants. It provides an overview of the organization's leadership structure and the collaborative efforts that drive its success.



" THE SECRET OF
CHANGE IS TO FOCUS
ALL OF YOUR ENERGY
NOT ON FIGHTING THE
OLD, BUT ON
BUILDING THE NEW "

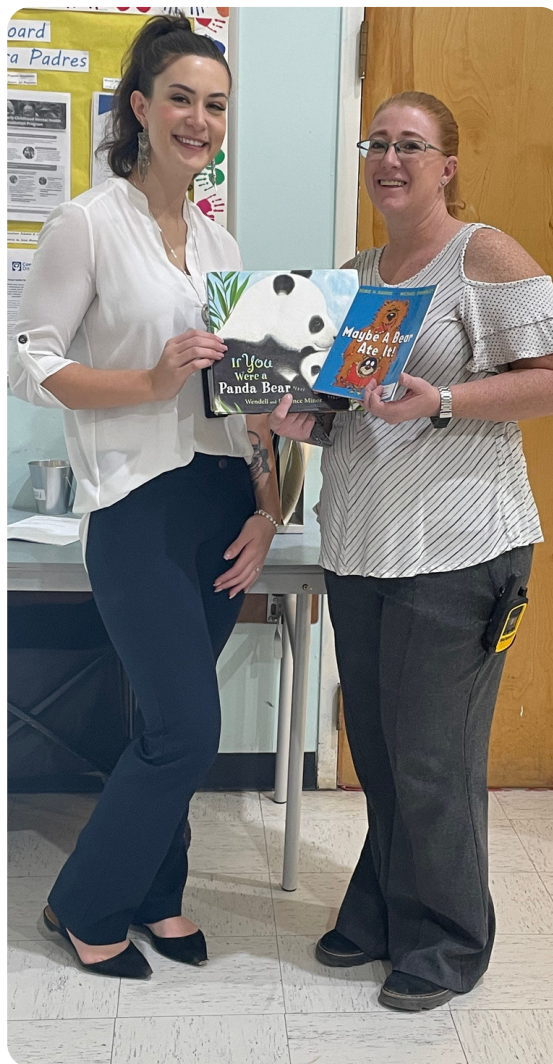
- SOCRATES





Rooted in Leadership & Strategy

At the heart of our collaboration is a shared commitment to building a strong leadership foundation. THS conducted key informant interviews, delving deep into our organization's dynamics to craft tailored strategies.



Our Transformative Journey with Third Horizon Strategies

Building a Foundation for Transformation

- **Collaborative Leadership:** Engaging THS for strategic planning and leadership development.
- **Enneagram Insights:** Exploring personality types to enhance communication and teamwork.
- **Three Action-Focused Workgroups:** Addressing key topics for effective change.
- **Crafting Value Statements:** Uniting to establish a value-centric organizational ethos.

Building a Foundation for Transformation





@SLVBHG

Collaborative Leadership

Navigating Change with Third Horizon Strategies

Our partnership with Third Horizon Strategies has been pivotal in our journey toward growth and strategic evolution. THS has provided valuable guidance in leadership and organizational development.

Strategy Outline:


- **Strategic Insight:**
 - THS's leadership and strategic planning expertise gave us valuable insights through interviews, helping us navigate change strategically. Interviews were done with both the board and executive leaders.
- **Unified Vision:**
 - Our work with THS has brought our senior leadership team closer together, aligning our goals and perspectives for better decision-making and cohesiveness. Our leadership and governance united under unified values collaborated on as a team.

WWW.SLVBHG.ORG



*Hope
Healing
Recovery*



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



Collaborative Leadership

Navigating Change with Third Horizon Strategies

As we embark on this transformative journey, guided by collaborative leadership, we are poised to chart a course toward a brighter, more impactful future for San Luis Valley Behavioral Health Group.

Strategy Outline:

- Revitalizing the Link:
 - By integrating enneagram insights and lessons learned, our team was able to unveil communication styles and their impact on professional outcomes
- Dynamic Retreat
 - Our retreats strengthen collaboration, communication, relationships, and planning.



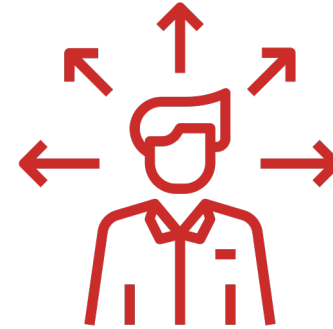


Enneagram Insights:



Enhancing Communication and Teamwork

By uncovering strengths, motivations, and communication styles, we are propelling our team toward a more cohesive and harmonious future.



Embracing Self-Awareness

Exploring nine distinct personality types to deepen understanding.



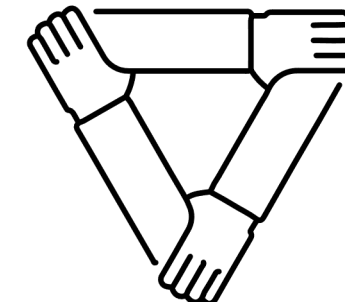
Fostering Effective Communication:

Leveraging insights to bridge gaps and foster collaboration.



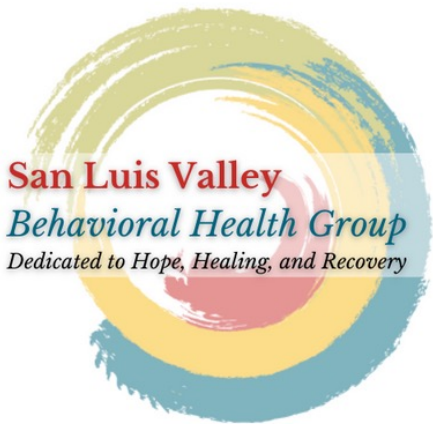
Empowering Team Dynamics:

Unveiling strengths, motivations, and communication styles.



A Catalyst for Cohesion:

Enneagram assessment propels us toward a more united and harmonious team.



San Luis Valley
Behavioral Health Group
Dedicated to Hope, Healing, and Recovery

Action-Focused Workgroups:

- Key Talking Points Workgroup: Structuring effective communication across leadership meetings and staff.
- Policy for Corrective Action Workgroup: Developing clear guidelines for staff support and corrective action.

Driving Change Together

- Performance Reviews Workgroup: Crafting a comprehensive administrative staff performance review process.
- Collaborative Solutions: Our workgroups harness diverse expertise to enact impactful change within our organization.



Crafting Value Statements:

Guiding Our Transformation



Shared Vision:

Collaboratively establishing core values that define our organization's purpose.



Ethical Compass:

Values guide decision-making, fostering integrity and accountability.



Cultural Alignment:

Uniting our team under a value-centric ethos for a harmonious workplace.



Building on Values:

Our value statements form the bedrock of our transformative journey, empowering us to create a more compassionate and impactful San Luis Valley Behavioral Health Group.

Small Group Exercise (Please select a facilitator, recorder, and presenter for the report-out)

1. What change management concerns do you have in your organizations?
2. What has worked well for you in the past in managing change?
3. What, if anything, would you like to incorporate into your change management strategy based on what you learned today?
4. What is one concrete action you will take as a result of this workshop?

Resources

John Kotter [“Strategies for Managing Change”](#)

Interaction Design Foundation
[“Understanding Early Adopters”](#)

Relias [“Leading Through Change”](#)

National Council for Mental Well-Being
[“Create the Conditions for Change”](#)





THANK YOU

Questions? Discussion!

Contact Us:

📍 Mindy Klowden

📞 (303) 884-2670

✉️ Mindy@thirdhorizonstrategies.com