

MERGERS



A PATH TO SUSTAIN AND IMPROVE PATIENT ACCESS
AND COMMUNITY OUTCOMES

Colorado Behavioral Healthcare Council
2023 Behavioral Health Training Conference
September 28, 2023

TODAY'S DISCUSSION

- ▶ THE WHY
- ▶ THE HOW
- ▶ LESSONS LEARNED LEARNING



TODAY'S PANEL:

Aurora Mental Health and Recovery

- ▶ Dr. Kelly Phillips-Henry, PsyD, Chief Executive Officer
- ▶ Harry Budisidharta, In House Counsel & Corporate Integrity Officer,

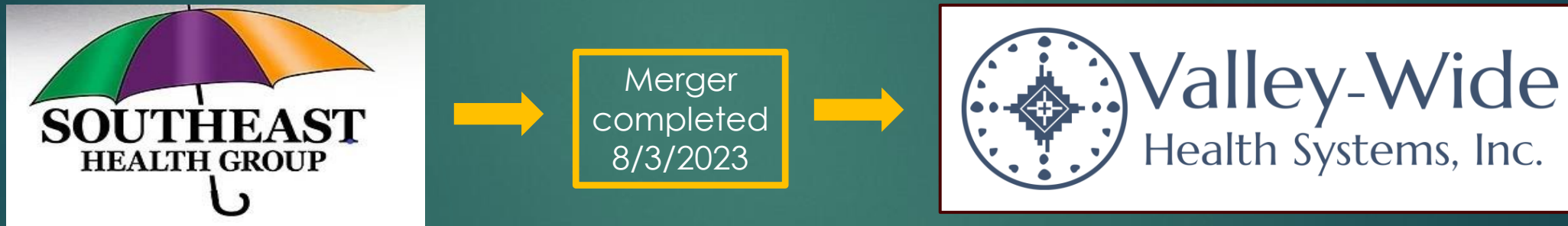
Valley Wide Health Systems, Inc

- ▶ Jania Arnoldi, PhD, President/CEO

Axis Health System

- ▶ Shelly Burke, Chief Executive Officer
- ▶ Shelly Spalding, Chief Operating Officer

THE OVERVIEW



THE “WHY”

Why did your organizations decide to merge?

- ✓ Challenges and Opportunities
- ✓ Financial Considerations
- ✓ Cultural Alignment

THE “HOW”

How did you assess the feasibility of a merger and support to the Board and Staff?

- ✓ Identification of any “No Go” issues
- ✓ Board Engagement and Evaluation
- ✓ Due Diligence
- ✓ Concerns and Communication
- ✓ Culture Transformation

LEASONS YOU ARE STILL LEARNING

What insights do you have to share?

- ✓The Time
- ✓The Effort
- ✓The Impact
- ✓The Unexpected

LIGHTNING ROUND QUESTIONS

- ▶ **Jania:** What is one thing you wish you had done?
- ▶ **Kelly:** What is one thing you wish you had not done?
- ▶ **Shelly S:** What is one takeaway you want the audience to know?
- ▶ **Harry:** How has your community responded to the merger?
- ▶ **Shelly B:** How did you decide who would lead the organization?
- ▶ **All:** What is the best thing that has come from this merger?

CURRENT STATE



Aurora
Mental Health & Recovery



Valley-Wide
Health Systems, Inc.



AXIS Health System

ITS STILL ABOUT THE MISSION



Aurora
Mental Health & Recovery

MISSION

Deeply rooted in our diverse community, we deliver state-of-the-art care impacting emotional well-being and addiction recovery



Valley-Wide
Health Systems, Inc.

MISSION

Valley-Wide Health Systems is committed to providing high-quality, safe, effective and integrated health care services in a respectful and inclusive manner for all with special consideration for medically underserved populations



AXIS Health System

MISSION

To make a meaningful difference through healthcare innovation and caring for the whole person

AND THE VISION AND VALUES



Aurora
Mental Health & Recovery

VALUES

Passionate Caring
Rising to the Challenge
Honoring and Respecting All
Persons
Believing in Resilience
Putting Clients and Community
First
Commitment to Collaboration
& Teamwork



Valley-Wide
Health Systems, Inc.

VISION

To be the innovative
community leader in
advancing the highest level of
whole-person health for all

VALUES

Excellence
Integrity
Sustainability
Teamwork
Leadership
Equitable



AXISHealth System

VISION

To improve the health of our
patients and communities as
the trusted provider of choice

VALUES

Committed to Excellence
Connected to our Community
Compassion for All