

ZUMBRO VALLEY

HEALTH CENTER



2015
ANNUAL REPORT

Table of Contents

Message from Leadership page 1
2015 Highlights pages 2 & 3
Meeting the Needs of the Communities We Serve pages 4 & 5
A Brief History page 6
Board of Directors and Leadership Team page 7
Financial Statement pages 8 & 9
Recognition page 10
Client Demographics pages 11

Our Vision

To be a national leader of person-centered, integrated, and collaborative health and wellness services.

Our Mission

Promoting healthy minds, bodies, and communities with a person-centered, integrated approach.

Our Values



Restoring Hope...One Life at a Time

Dear Friends,

The term “transformation” is an apt description to express the past year for Zumbro Valley Health Center. At the national, state and local levels, the health care system continues to be transformed to meet the Triple Aim’s goal of improving care, enhancing patient satisfaction and reducing costs. These dimensions serve as guiding factors for new models of care, and health care continues to be in the forefront of public conversation.

As we begin our 50th year of serving SE Minnesota, Zumbro Valley Health Center continues its evolution to meet the health care needs of the communities we serve. This means developing new programs, expanding our facilities and integrating staff and services to better meet the increasingly complex needs of our clients. Our focus has been, and continues to be, restoring hope...one life at a time.

The past year saw significant achievements for our organization and staff. Our integrated model of care pilot realized exceptionally strong outcomes and savings; we expanded our primary care clinic space and hired new staff to meet increased demand; we partnered with Goodwill Easter Seals to add a new employment and training program; and we were certified as a Health Care Home. Each of these accomplishments is noteworthy by itself, but together they have positioned Zumbro Valley Health Center to be a leading provider of integrated health care services.

We would like to take this time to convey our sincere appreciation to the philanthropic and public support that sustains much of the care Zumbro Valley Health Center provides. These partnerships are essential to helping make our organization a core provider of care for the under-served within the region.

On behalf of the board and staff at Zumbro Valley Health Center, and the 1 person in 5 in our community living with a mental illness, thank you for your continued commitment and support.

“At the root of this dilemma is the way we view mental health in this country. Whether an illness affects your heart, your leg or your brain, it’s still an illness, and there should be no distinction.”

– Michelle Obama



Dave Cook
Chief Executive Officer



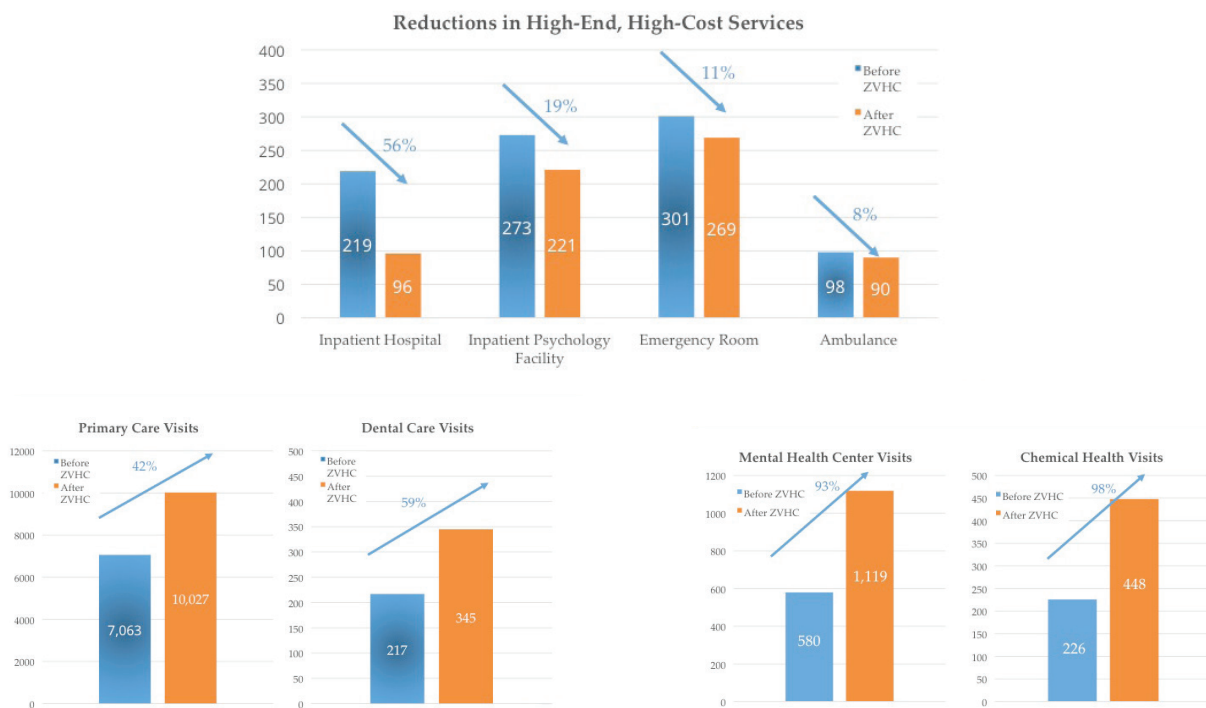
Dr. Margaret Lloyd
Chair, Board of Directors

2015 Highlights

For the past 50 years, Zumbro Valley Health Center staff have worked to improve the health of under- and un-served people in SE Minnesota. During this time, we have developed a continuum of programs addressing the mental, chemical, social and medical needs of our clients. In 2015, the organization continued its “whole-person” approach to care through the following key highlights:

- **Completed Primary Care Pilot.** Working with Wilder Research and the Dept. of Human Services, Zumbro Valley Health Center measured the impact of integrating and coordinating care over a two-year period for patients accessing behavioral health and medical care at the facility. The study showed significant cost savings (an ROI of \$2.63 for each \$1 invested) primarily through major reductions in the use of high-end services such as emergency rooms, inpatient hospitalizations, ambulance rides and inpatient psychology facilities. Findings also revealed a marked shift to preventive-based services, including primary care, mental health, dental care and addiction treatment providers. The patients who were treated through this integrated model of care showed high satisfaction with their experience and reported their mental and physical health had improved dramatically during treatment.

Clinical Benefits of Integrating Care



- **Collaborated on New Employment Training Program.** Partnering with Goodwill-Easter Seals and Vocational Rehabilitation Services, our organizations received funding to develop an on-site supported employment program for Zumbro Valley Health Center clients. This new program helps people identify potential jobs, prepares them for interviews and offers ongoing support after employment is secured.
- **Launched Crisis Response for SE Minnesota Program.** Coordinating mental health resources over a 10-county region in SE Minnesota, the new Crisis Response program offers 24/7 phone support, linkage to local resources, assessment services and after-hours mobile teams that meet with people to provide further support. Zumbro Valley Health Center was selected to spearhead this initiative that streamlines these various services under a centralized team.



- **Received Certification as Health Care Home.** Following a rigorous application process, Zumbro Valley Health Center earned Health Care Home certification from the Minnesota Department of Health. This certification was the first of its kind for a mental health facility in the state of Minnesota.
- **Expanded Integrated Care Model.** Zumbro Valley Health Center increased both its staffing and facilities to better meet the growing numbers of clients diagnosed with co-morbid conditions. Staff also received specialized training to enhance their ability to identify and treat clients with these conditions. Our organization received significant support from the state legislature, Mayo Foundation, the Minnesota Department of Health, Medica Foundation and Merchants Bank.
- **Hired New Medical Director.** After an extensive search process, Zumbro Valley Health Center hired Bernadette Huard, MD, to lead the development, implementation and coordination of psychiatric and medical practices and policies within the organization. Dr. Huard, who has more than 30 years of experience working in community behavioral health settings, is board-certified in psychiatry.

- **Presented the Circle of Excellence Award.** Highlighting its outstanding contributions to human services program clients, Zumbro Valley Health Center was selected for the Commissioner's Circle of Excellence award from the Minnesota Dept. of Human Services. This prestigious award is given to professionals and organizations that foster healthy people, stable families and strong communities.



- **Increased Community Engagement.** As part of its ongoing efforts to educate people about the benefits of an integrated care approach, Zumbro Valley Health Center staff hosted, presented or participated in 18 targeted community engagements involving clients, families, elected representatives, community partners and other stakeholders in various locations at the local, state and national levels.



Meeting the Needs of the Communities We Serve

Chemical Health Services

- **Connections and Referral Unit** – the Connections and Referral Unit provides detoxification services for people experiencing sub-acute intoxication due to chemical use. Other services include the 24-hour crisis hotline; monitored sobriety and monitored Antabuse services; urinalysis; and dispatch of after-hours social workers and assertive community treatment team (evenings, weekends and holidays).
- **Recovery Programs** – the Zumbro Valley Health Center recovery programs provide outpatient substance use disorder services including assessment, treatment, DUI classes and educational groups, sober living skills training and assistance with housing. Additional services include: a harm reduction program for people with a long history of substance use disorders; counseling for those with cognitive disorders and in need of substance use services; programming for persons with dual diagnoses of mental illness and substance use disorder; and rehabilitative and independent living skills to help people learn important social and community survival skills.
- **Somali Recovery and Support Services** – culturally specific early intervention services for individuals from the Somali community with addictive behavior. Outreach staff work with individuals and families to help them understand that alcoholism and drug use are diseases, provide information about the negative impacts of drugs and alcohol and offer guidance on how to help others struggling with substance abuse.

“Mental illness is nothing to be ashamed of, but stigma and bias shame us all.”

– Bill Clinton

Children’s Programs

- **Child Guidance Clinic** – therapy-based program that features experts from multiple areas - psychiatry, therapy, counseling - to work with children and their families to assess strengths and needs, identify and develop goals, provide testing, refer to psychiatry as necessary and evaluate progress.
- **School-Linked Mental Health Services** – program that provides on-site mental health services to students who would otherwise be unlikely to access these services in the community. Through this grant, a Zumbro Valley Health Center therapist works at the Alternative Learning Center to help students diagnosed with a mental illness better understand their symptoms and provide convenient access to counseling and therapy.
- **Youth Behavioral Health** – a collaboration of Zumbro Valley Health Center, Family Service Rochester and Olmsted County Community Services, this innovative program provides case management and in-home services for families with children experiencing severe emotional disturbances. The program also provides an Early Intervention service working with Head Start children and families at risk for developing emotional disturbances. Early Intervention includes culturally sensitive services for Somali families.

Community Support Programs

- **Case Management Services** – program that assists people with serious and persistent mental illness to function independently in the community. Case managers help participants find existing community resources, obtain referrals to medical, social and educational services and provide advocacy services when needed. In addition, our bilingual case management staff offer culturally sensitive programs for people of Somali and Southeast Asian descent.
- **CD Navigator** – this unique program is designed to provide intensive case management to individuals over a 10-county region who have been unable to achieve their recovery goals through traditional treatment methods. Its range of intensive services provide the level of contact necessary for them to address their substance abuse and other corresponding issues.
- **Fillmore County Community Support and Psychological Services** – located in Harmony, this program includes assessment services, individual psychotherapy, case management and medication education services for residents of Fillmore County.

- *Independent Living Support Services* – provides a range of integrated services to help people secure housing, build a support network and develop the self-confidence to achieve their personal goals. Key programs include housing support, Adult Rehabilitation Mental Health Services (ARMHS) and case management.

Housing

- *Footsteps 4 Recovery* – the Homeless Services Team utilizes outreach and advocacy to help homeless people with chemical dependency issues find housing and receive treatment. Funded by a grant from the Minnesota Dept. of Human Services, the focus of this initiative is to help end homelessness in Minnesota.
- *Housing Options* – Zumbro Valley Health Center offers individuals with serious mental disorders help with finding and maintaining safe, affordable housing in the community. Housing Options include shared housing, subsidies, Northgate Apartments and the Shelter Plus Care subsidies.
- *Homeless Services* – this team provides intensive case management to 38 single adults who meet the definition of long-term homelessness. Services focus on securing safe, stable housing, basic needs, benefits assistance and employment.

Intensive Residential Treatment

- *Residential and Crisis Stabilization* – on-site program that provides 90 days of residential care for up to 12 adults requiring a treatment-oriented environment to manage their mental illness. Services include crisis stabilization, nursing, family education, illness management and recovery, independent living skills training, integrated dual diagnosis treatment and discharge/aftercare planning.
- *Crisis Stabilization* – on-site program available for up to four adults requiring immediate support with their behavioral health symptoms. The program provides crisis care for up to 10 days at our facility.

Outpatient Therapy Services

- *Counseling and Therapy* – range of psychological services designed to help children, adolescents and adults to identify mental health issues and to develop strategies to manage them. The multi-specialty team of behavioral health specialists utilize a client-centered approach that includes testing, evaluation and therapy in both individual and group settings.
- *Psychiatry* – multi-disciplinary team of psychiatrists, nurse practitioners, registered nurses and medical assistant that offers comprehensive testing, medication management and therapy services.

Primary Care Services

- *Health Care Home* – model of care centered on providing integrated services that are client-centered, comprehensive, team-based, coordinated and quality focused.
- *Primary Care* – clinic that provides basic medical services and lab testing to clients and individuals in other underserved populations who do not access it elsewhere in the community. Clinic staff stabilize people’s medical condition(s) and coordinate their medical and behavioral health needs to help improve their overall quality of life.

In addition, Zumbro Valley Health Center developed partnerships with Genoa, a QoL healthcare company and Apple Tree Dental to provide the community with access to pharmacy and dental services, respectively. Through these collaborations, our organizations have helped thousands of SE Minnesota residents who have limited or no access to these services obtain necessary pharmacy and dental care.

*Restoring Hope...
One Life at a Time*

50 Years of Service – A Brief History

In 2016, Zumbro Valley Health Center celebrates 50 years of service to SE Minnesota. What started with the passage of the Minnesota Mental Health Center Act by the state legislature came to fruition in 1966 when the organization began providing mental health services to Olmsted and Fillmore County residents. Five years later, the Detoxification Unit opened and began serving people across SE Minnesota.



Our early years saw a steady expansion in both program development and communities served, especially with passage of the Community Social Services Act in 1980 which focused resources on community-based services for people diagnosed with a severe and persistent mental illness. The following year the Rochester State Hospital closed, shifting more clients to Zumbro Valley Health Center for treatment. The early 1990s saw a significant expansion of programs for addictions treatment as well as our entry into providing housing services and community support programs. During this time, our organization also merged with THOMAS Group, adding THOMAS House, day treatment and other community support programs into our continuum of services.

The past five years have seen significant changes in the health care environment and Zumbro Valley Health Center is playing an important role in the state's shift to its Minnesota Accountable Health Model. Our organization has added programs such as primary care and employment training while partnering with others to bring on-site access to key services like dental care and pharmacy. We also are well-positioned for new care models such as health care/behavioral health homes and population health management.

For a half-century, Zumbro Valley Health Center has been a leading treatment provider of mental health and addiction disorders for people throughout SE Minnesota. During this time, our organization has remained committed to offering the highest-quality programs to meet the changing needs of the people and communities we serve. As we celebrate 50 years of service, we reflect on the moments and people who made this possible and share our gratitude for the current supporters who continue to believe in our mission. Thank you.



Leadership



Board of Directors

Dr. Margaret Lloyd, *Chair – Olmsted County*
Steve Kerchberger, *Vice Chair – Olmsted County*
Sister Linda Wieser, *Treasurer/Secretary – Olmsted County*
Anne Pronschinski, *Past Chair – Olmsted County*
Matt Flynn – *Olmsted County*
Samantha Grabau – *Fillmore County*
Rep. Tina Liebling – *Olmsted County*

Penny Ness – *Olmsted County*
Craig Oslund – *Olmsted County*
Marc Prestby – *Fillmore County*
Dr. Jennifer Rho – *Olmsted County*
Bill Ryan – *At Large*
Cathy Shea – *At Large*

Leadership Team

Dave Cook, *Chief Executive Officer*
Judy Eichman, *Chemical Health Services*
Heather Geerts, *Clinical Director*
Scott Gerdes, *Chief Financial Officer*
Dr. Bernadette Huard, *Medical Director*

Corey Kanz, *Connections and Referral Unit*
Ashley Kothenbeutel, *Residential Services*
Tracy Lee, *Chief Operating Officer*
Sean Rice, *Marketing and Development*
Tina Nunemacher-Tews, *Community Support Programs*



Financial Statement

The past year represented the seventh consecutive positive financial year for Zumbro Valley Health Center. In 2015, the organization exceeded its financial goals and continued to improve its overall financial position. For the year, Zumbro Valley earned revenue above expenses in the amount of \$715,423, an increase of \$126,832 from the previous year.

Key financial highlights include:

- Cash reserves increased to \$1,633,381, a growth of \$437,994 from the previous year, and brings the days cash reserve to 91
- Accounts receivable decreased to \$536,818, a decline of \$94,728 from 2014
- Development net assets increased to \$256,011, the seventh straight year these funds have increased
- The organization paid down \$239,598 of the debt on its campus building

“With the new day comes new strength and new thoughts. You must do the thing which you think you cannot do.”

– Eleanor Roosevelt
(suffered from depression)

Zumbro Valley Health Center Zumbro Valley Health Foundation Combined Statements of Financial Position *December 31, 2015 and 2014*

ASSETS	2015	2014
Current Assets		
<i>Cash and cash equivalents</i>	\$2,537,554	\$1,646,845
<i>Accounts receivable, net of allowance</i>	\$536,818	\$631,546
<i>Prepaid expenses and other</i>	14,331	\$18,018
TOTAL CURRENT ASSETS	\$3,088,703	\$2,296,409
Property and Equipment, net of depreciation	\$6,626,074	\$6,735,471
Other Assets	\$409,049	\$411,982
TOTAL ASSETS	\$10,123,826	\$9,443,862
LIABILITIES AND NET ASSETS		
Current Liabilities	\$1,327,908	\$1,123,768
Long-Term Debt	\$4,778,348	\$5,017,946
Net Assets	\$4,017,570	\$3,302,148
TOTAL LIABILITIES AND NET ASSETS	\$10,123,826	\$9,443,862

Zumbro Valley Health Center
Zumbro Valley Health Foundation
Combined Statements of Activity and Changes in Net Assets
For the Years Ended December 31, 2015 and 2014

PUBLIC SUPPORT AND REVENUES	2015	2014
Patient revenues:		
<i>Private pay</i>	\$38,637	\$54,963
<i>Counties</i>	\$3,671,193	\$3,915,308
<i>State health plans</i>	\$5,637,958	\$5,376,227
<i>Federal health plans</i>	\$266,360	\$376,026
<i>Private insurance</i>	\$734,698	\$578,515
<i>Housing</i>	\$549,636	\$560,219
Grants	\$247,370	\$361,871
Investment	\$7,664	\$6,304
Administrative and other income	\$72,226	\$33,399
TOTAL PUBLIC SUPPORT AND REVENUES	\$11,225,742	\$11,262,832
EXPENSES	2015	2014
Program services:		
<i>Fillmore Community Support</i>	\$173,337	\$132,393
<i>Case Management</i>	\$913,850	\$936,497
<i>ARMHS</i>	\$254,011	\$254,461
<i>Psychotherapy</i>	\$855,083	\$941,383
<i>CMHRC</i>	\$496,195	\$490,249
<i>Recovery Programs</i>	\$366,440	\$345,488
<i>Intensive Community Rehab Services</i>	\$347,236	\$409,409
<i>On Call Crisis Services</i>	\$206,529	\$54,911
<i>Psychiatry</i>	\$717,215	\$816,997
<i>Connections and Referral Unit</i>	\$1,311,757	\$1,413,708
<i>IRTS Program</i>	\$1,433,519	\$1,428,849
<i>Homeless Program</i>	\$714,727	\$762,227
<i>Housing Program</i>	\$383,977	\$379,854
<i>CD Pilot Project</i>	\$332,824	\$334,128
<i>Somali Grant</i>	\$155,929	\$142,014
<i>Primary Care</i>	\$168,251	\$163,424
TOTAL PROGRAM SERVICES	\$8,830,880	\$9,005,992
Supporting services	\$1,679,439	\$1,668,249
TOTAL EXPENSES	\$10,510,319	\$10,674,241
INCREASE (DECREASE) IN NET ASSETS	\$715,423	\$588,591

Donors – January 1 through December 31, 2015

Thank you for restoring hope...one life at a time

Partners

Appliance Village
Shery Block
Cascade Medical Center & Inn
Disabled Veterans of America
Home Depot Foundation
IBM
Dr. Margaret Lloyd
Mathy Construction
Mayo Clinic
Mayo Clinic Facilities Operations
Merchants Bank
Soldier's Field Veterans Memorial
Veteran's Memorial
VFW Post 1215

Builders

American Legion Post 333
David Bahr
Tom & Margie Bellinger
The Bon Ton Stores
Country Financial
Cumulus Radio
Eastman Auto Repair
Genoa, a QoL healthcare company
HandiVan Specialty Transport Services
Heritage Animal Clinic
KTTC
Sheila McNallan
Meadowview Vet Clinic
Northern Valley Vet Clinic
Olmsted Medical Center
Pine Island United Fund
Quarry Hill Animal Hospital
Sean & Darci Rice
Rochester Area Family Y
William Ryan
Sue Stanek

Supporters

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Jeffrey Allman
Byron Pet Clinic
Dave & Debbie Cook
Candy Czernicki
Scott & Monica Eggert
Sharon Hostetter
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Tina Liebling
Tom Kadlec Honda

Grants

Hearth Connection
Mayo Foundation
Medica Foundation
Minnesota Department of Human Services
Olmsted, Steele, Dodge, Fillmore, Goodhue,
Houston, Mower, Winona, Wabasha &
Waseca counties
United Way of Olmsted County

Friends

Aubrey Anderson
Monte Anderson
Shirley Anderson
Jeanne Andre
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Scott Ariagno
Amy Benike
Christine Benson
Jennifer Berge
Leann Bieber
Judy Biers
Dennis Blang
Deb Blomberg
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Michael Bond
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Niki Dietz
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Molly Ditommaso
The Doo Crew
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Judith Eichman
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Perfect Fit Clothing Assignment
Spencer Pfeifer
Robert Pence
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Jerry Porter
Preston Village Community Chest
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Cindy Purrier
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Beth Thompson
Krista Thompson
Tiffany Trnka
Kellee Tussing
Kim Vering
Noor Visser
Cecilia Wade
Ruisi Wang
Nancy Weatherly
Rue Wiegand
Linda Wieser
Michelle Wilkinson
Tim Wilson
Winona State University -
Rochester staff
Danielle Yates
Nicole Yates
Jimmy Young

2015 Client Demographics

Gender

Percentage

Female	44%
Male	56%

Total: 100%

Age Group

Percentage

Under 5	1%
Between 5 & 12	3%
Between 13 & 17	6%
Between 18 & 29	25%
Between 30 & 64	61%
Over 64	4%

Total: 100%

Marital Status

Percentage

Divorced	16%
Married	12%
Separated	4%
Single/Never Married	58%
Unknown	8%
Widowed	2%

Total: 100%

Ethnicity

Percentage

American Indian/Alaska Native	1%
Asian	3%
Black/African American	10%
Native Hawaiian/Pacific Islander	1%
Other	3%
unknown	4%
White	78%

Total: 100%

County of Residence

Percentage

Blue Earth	1%
Dodge	3%
Fillmore	6%
Freeborn	1%
Goodhue	3%
Hennepin	1%
Houston	1%
Mower	3%
Olmsted	67%
Others	3%
Rice	1%
Steele	2%
Wabasha	3%
Winona	5%

Total: 100%



CAN WE LIVE LONGER?

Integrated Healthcare's Promise

The PROBLEM

People with mental illness die earlier than the general population and have more co-occurring health conditions.



68%

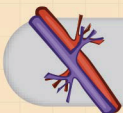
of adults with a mental illness have one or more chronic physical conditions

more than

1 in 5

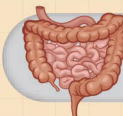
adults with mental illness have a co-occurring substance use disorder

Co-occurrence between mental illness and other chronic health conditions:



Mental Illness 21.9% High Blood Pressure

No Mental Illness 18.8%



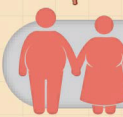
Mental Illness 7.9% Diabetes

No Mental Illness 6.6%



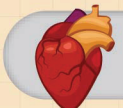
Mental Illness 36% Smoking

No Mental Illness 21%



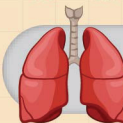
Mental Illness 42% Obesity

No Mental Illness 35%



Mental Illness 5.9% Heart Disease

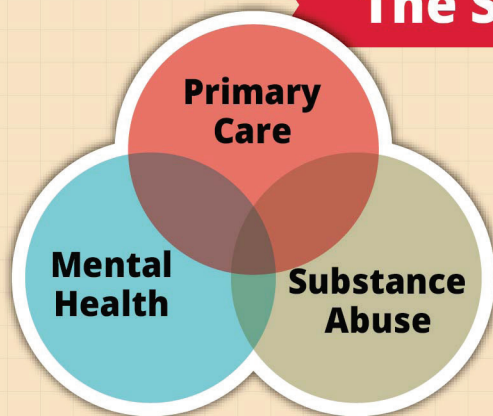
No Mental Illness 4.2%



Mental Illness 15.7% Asthma

No Mental Illness 10.6%

The SOLUTION



The solution lies in integrated care - the coordination of mental health, substance abuse, and primary care services. Integrated care produces the best outcomes and is the most effective approach to caring for people with complex healthcare needs.

Margaret

“Margaret” is a female in her mid-fifties who receives services from multiple Zumbro Valley Health Center programs. During a recent visit with her case manager, she expressed some confusion about her current medications citing the similarity in appearance between the pills used to treat her hypertension and anxiety. Margaret’s case manager immediately brought her to the primary care clinic to discuss the matter with the nurse practitioner and registered nurse as Margaret had visited the primary care clinic multiple times and had a strong relationship with its staff. During the discussion, clinic staff consulted the pharmacist from the on-site Genoa pharmacy. Margaret, her case manager and the registered nurse visited the pharmacist, who brought out samples of each medication so she could show Margaret the slight differences in appearance between the two medications. The pharmacist also printed out photos of each pill that Margaret could take home and help her identify the appropriate medication.



Bob

“Bob” is a 65-year-old male who has been seen in the psychiatry department for over ten years for treatment of major depressive disorder. Along with this mental illness, he also has an extensive cardiac history that began in 2000 when he suffered his first heart attack. Since that time, Bob has experienced two additional heart attacks, most recently about five years ago. He has faced numerous barriers to optimal medical care, including financial difficulties and limited access to care as he lives in a rural area. These barriers have restricted his ability to follow up on appointments and purchase the potentially life-saving medications he needed. Bob originally visited the clinic as he found it convenient to have a primary care clinic located in the same facility as his mental health care provider. During his initial appointment, Bob reported he had not been to a medical doctor for any reason in several years. After completing a full physical assessment and the appropriate blood work, he returned for a follow up appointment to discuss the results and to develop a plan of care. Clinic staff spoke with Bob about the importance of the medications for his cardiac disease and came to an agreement on how much he could afford monthly. Staff also helped him compare at various pharmacies and connected Bob with a pharmacy in his area that provided discount programs for patients without prescription insurance. The primary care provider also contacted the Mayo Health System site closest to his home for an appointment, as he would need further evaluation for his cardiac condition. Bob’s health has improved and he continues to visit Zumbro Valley Health Center for his ongoing care.



*Restoring Hope...
One Life at a Time*

Main Office
343 Wood Lake Drive SE
Rochester, MN 55904
Phone: 507-289-2089
Fax: 507-289-2327
www.zvhc.org

Downtown Office
29 7th Street NE
Rochester, MN 55906
Phone: 507-535-5656
Fax: 507-287-1465
www.zvhc.org

Fillmore County Office
65 Main Avenue North
Harmony, MN 55939
Phone: 800-422-0161
Fax: 507-886-1490
www.zvhc.org