

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



Zumbro Valley  
*Mental Health Center*

2008  
*Annual Report*

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## Vision

Zumbro Valley Mental Health Center is a premier provider of integrated behavioral health services through a regional system with a philosophy of community based recovery in treatment of mental health and substance use disorders.

## Mission

Zumbro Valley Mental Health Center is your community partner for responsive, effective and affordable mental health and chemical health care.

## Our Purpose

Zumbro Valley Mental Health Center exists to address the mental health and chemical health needs of community members, regardless of their social position or status. Our purpose is to improve the mental and chemical health of the communities we serve, thereby contributing to a safe, healthy community that increases personal growth, responsibility and independence. Vital to this commitment is a system of high quality services that are based on the best available knowledge about what treatments improve mental health, chemical health, self-sufficiency and personal fulfillment.



# Message from Leadership

As we look back over the past year, we are struck by the changes that face our community. We are witnessing unprecedented economic and social upheaval, resulting in unhealthy levels of stress and anxiety in people of all ages. At the same time, cutbacks at the federal and state levels are hampering our ability to provide services to people at the precise time they are needed most.

If the economic conditions of 2008 taught us anything, it's that the best investment is an investment in people – an investment in the community. That's why, this past year, we focused on repositioning ourselves as a true community leader. For instance, we began exploring ways to collaborate with community organizations to regionalize delivery of mental and chemical health services. We also continued to provide educational opportunities for local providers through our annual Excellence in Psychotherapy conference and other seminars.

Difficult times demand our finest performance, and as we look back on Zumbro Valley Mental Health Center's efforts in 2008, we feel pride in our accomplishment and promise in our efforts. We collaborated with the state and area counties to launch new programs that helped hundreds of people obtain treatment for their mental/chemical disorders and secure housing. We expanded our flood recovery program to provide outreach and crisis counseling services to residents in Fillmore, Freeborn, Houston and Mower counties affected by the June flooding. And, the Supported Employment Program received its third consecutive Three-Year Accreditation from the Commission for Accreditation of Rehabilitative Facilities (CARF).

Although the Board, leadership team and staff are all proud of our many achievements in the past year, there is still much to do. The changing health care landscape, along with the current financial environment, require Zumbro Valley Mental Health Center to be vigilant if we wish to continue meeting the psychiatric, chemical health, rehab and support services, counseling and housing needs of the communities we serve.



*Lynn C. Skinner*

Lynn Skinner  
Board President



*Patricia J. Carlson*

Patricia Carlson  
Executive Director

# Highlights

Over the past year, Zumbro Valley Mental Health Center has significantly enhanced its ability to serve the mental health needs of the community. Our board, leadership team and staff worked diligently to expand accessibility while continuing to improve the level of care our clients received.

Key accomplishments included:

- **Selected to Administer On-Call Crisis Program.** Olmsted County and Zumbro Valley collaborated to develop a new on-call crisis program. This program provides one-on-one crisis services to county residents to help decrease hospitalizations for mental health-related issues.
- **Awarded CARF accreditation.** The community employment services received the maximum three-year accreditation from the Commission for Accreditation of Rehabilitative Facilities. The award recognized Zumbro Valley's compliance with stringent CARF regulations that demonstrated a pattern of practice excellence. In addition, the organization's adult rehab mental health service program was re-certified by the state.
- **Secured RTR Plus grant from Minnesota Dept. of Human Services.** This two-year grant allowed Zumbro Valley staff to help homeless people with substance use disorders obtain housing and treatment services. In the first year alone, more than 200 people received assistance getting off the street and obtaining access to mental and chemical health services.
- **Launched ICRS program.** The state selected Zumbro Valley to oversee one of four demonstration project designed to reduce adverse outcomes for people with mental health disorders. The intensive community rehabilitation services program provides a range of integrated clinical and rehab services to residents of Olmsted, Fillmore and Mower counties.
- **Received COSIG funding from Minnesota Dept. of Human Services.** Funding from this grant has provided critical training for staff, allowing Zumbro Valley to improve satisfaction with services while helping more people. Enhancements include the use of collaborative therapy techniques, the addition of more classes, streamlining the intake process and use of new screening tools.
- **Hosted community education classes for mental health professionals and county residents.** Zumbro Valley added the Bridges Out of Poverty seminar to its annual Excellence in Psychotherapy conference to educate the community about mental and chemical health. The organization also presented to numerous local organizations about the prevalence of mental health disorders in our community.
- **Completed Flood Recovery Partners program.** Originally developed with FEMA to provide mental health services to people affected by the August 2007 flooding, the Flood Recovery Partners program served residents from 16 different communities in Southeast Minnesota before closing in October 2007. A follow-up program, funded by the State of Minnesota, ran from June – December last year following the devastating floods that struck Southeast Minnesota. Overall, staff assisted more than 6,100 adults, adolescents and children with stress- and anxiety-related symptoms.



# Improving Our Community *Every Day*

“John” is a middle-aged homeless man who entered treatment for mental illness and chemical dependency. After initial struggles with visual hallucinations and rapid slurred speech, he made an increased commitment to sobriety from cocaine and opiates. John became an active participant in sober activities and support groups. He successfully discharged to an adult foster care setting, and has reported continued sobriety, regular participation in community groups and feeling hopeful about his future.



*To protect individuals' privacy, real names and pictures were not used.*

“Wanda” is a young woman in her mid-twenties with a history of significant drug use as well as bipolar disorder who had needed intensive services in the past. She also had a head trauma. Wanda was referred to our Rapid Access Clinic following a hospitalization for increased symptoms of bipolar disorder due to being off medications for some time. Her medications were restarted and her blood levels were monitored. She stabilized quickly and obtained full-time employment. Wanda then transitioned to community care and has required no further service.



*To protect individuals' privacy, real names and pictures were not used.*

“Jim” is a young boy from Rushford who expressed fear and anxiety to rain and storms following the flooding. He would go to the basement every time there was a light rain or even dark clouds. A Zumbro Valley therapist met with the family several times, and worked with them to develop a “storm kit” for the basement that helped distract the boy from his fears. Jim is now doing much better and is dealing with his weather anxiety in a very healthy manner.



*To protect individuals' privacy, real names and pictures were not used.*



*To protect individuals' privacy, real names and pictures were not used.*

“Cheryl” is a young woman that needed housing for herself and her son. The Shelter Plus Care program found a safe, affordable apartment for the two. Cheryl found a full-time job in the health care industry and now pays the majority of her rent. She was voted Employee of the Month by her colleagues and has established herself as an active member of the community.

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

# Meeting Basic Needs

## *of Individuals & Families*

*"Zumbro Valley is very organized. I really appreciated the options, like having my family receive information and advice on bi-polar disorder and how to cope with my issue. I am very satisfied with all aspects of the program."*

*– Outpatient Therapy Client*

*"(My provider) takes the time to understand my needs and concerns and has taken time for me when she didn't have the time. I have come a long way since I started the program."*

*– Case Management Client*

*"Your services and programs continue to improve each year. I want to thank everyone at Zumbro Valley for being here for me and others like me."*

*– Outpatient Therapy Client*



### *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 response 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 Mental 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 chemical health 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. Versions of these programs have been developed specifically for the Hispanic culture as well.

*Programs are licensed by the Minnesota Department of Human Services*

### *Children's Programs*

- **Children's Mental Health Resource Center** – a collaboration of Zumbro Valley Mental 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.
- **Root River Program** – based in Harmony, this collaborative program of Zumbro Valley Mental Health Center, the Root River School District and Fillmore County provides education, case management and mental health services to middle and high school-age youth in Fillmore County who are unable to attend their public school due to a significant emotional disorder.

### *Community Support Programs*

- **Case Management Services** – program that assists adults 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. And, our bilingual case management staff offer culturally sensitive programs for people of Somali and Southeast Asian descent.
- **Supported Employment Program** – accredited community employment program that teaches adults with a serious mental illness important job skills and provides ongoing support to help them become self-sufficient.

- **Day Programs** – educational programs for adults with a severe mental disorder that help participants learn basic activities of daily living. The Adult Rehabilitation Mental Health Services (ARMHS) and day treatment programs provide techniques – improving interpersonal skills, managing medicines, setting daily goals, etc. – to help them live independently.
- **Fillmore County Community Support and Psychological Services** – located in Harmony, this program includes assessment services, individual psychotherapy, case management, medication monitoring, domestic violence offender treatment groups in Preston, tele-health and supported employment services for residents of Fillmore County.

### Housing

- **Housing Options** – Zumbro Valley Mental 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 32 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.

Both programs are licensed by the Minnesota Department of Human Services

### Outpatient Therapy Services

- **Psychological & Psychiatric Services** – a comprehensive outpatient clinic staffed by licensed professionals who provide psychiatric services, medication management, diagnostic assessment, psychological testing and individual, family and group therapy for a variety of mental health conditions.



*"I wanted to write and let you know how satisfied I have been with your services. Based on my many positive experiences, I have recommended other people to Zumbro Valley for treatment."*

– Psychiatry Client

*"In all my experiences and communications with various levels of staff, I have – always – been treated with the utmost respect, compassion and consideration. I truly and deeply appreciate such wonderful treatment from each individual. Thank you so much!"*

– Day Programs Client

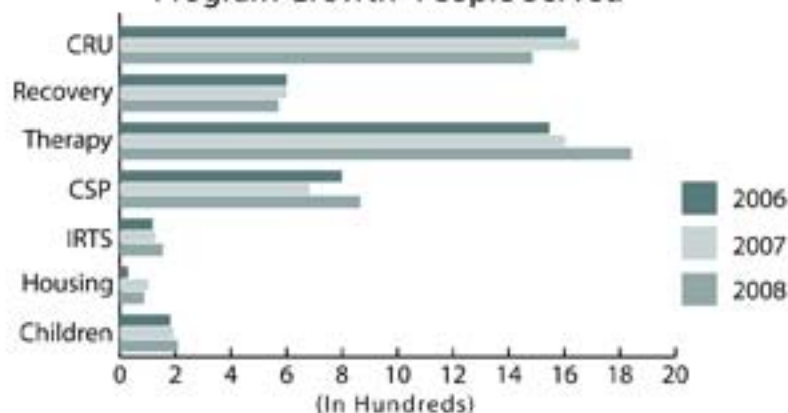
*"I have attended Recovery Partners, dialectic behavioral therapy, residential treatment, outpatient therapy and psychiatry and all were excellent."*

– Recovery Programs Client

*"The staff is great and they have helped my daily living a great deal."*

– Homeless Services Client

Program Growth- People Served



# Working Together

## *to Build Strong Communities*

*"Your program is great! I have a very open and understanding worker. She takes the time to understand my needs and concerns and has taken time for me when she didn't have the time. I have come a long way since I started the program. My worker has helped me start my life over again."*

*– Homeless Services Client*

*"I will always use Zumbro Valley because it is the only place I can afford to get psychiatric services."*

*– Outpatient Therapy Client*

*"Thanks for all the help you have done for me. I have learned a lot here."*

*– Children's Services Client*

*"The Recovery Programs and IRTS provided great tools to prevent relapses."*

*– Residential Treatment Client*



Zumbro Valley Mental Health Center partners with local and regional organizations, providing leadership on cooperative efforts to identify and address behavioral health problems and reduce stigma in the region.

Key initiatives include:

- **Rapid Access Clinic.** This collaboration of Zumbro Valley Mental Health Center, Olmsted County Community Services and community mental health professionals focuses on serving adults with an urgent, but not emergent, need for psychiatric care. The clinic was designed to bridge this gap, reducing wait times for initial psychiatric appointments and avoiding more costly care in emergency rooms and inpatient settings. Since late 2005 the Rapid Access Clinic has increased the number of people served each year to an average of about 100.
- **On-Call Crisis Program.** Olmsted County Community Services selected Zumbro Valley Mental Health Center to provide crisis assessment and intervention for adults with a mental illness. Our staff provides service during weekday evenings and 24-hour service during weekends and holidays to help reduce costlier hospitalizations for mental health symptoms.
- **Electronic Medical Record.** The Minnesota Department of Health awarded Zumbro Valley and its collaborating partners – Goodhue County Mental Health Services, Family Service Rochester and South Central Human Relations Center – a \$50,000 grant to plan a comprehensive, inter-agency electronic medical record. This project will significantly improve the exchange of client information between our organizations, resulting in better coordinated care and improved outcomes.

Zumbro Valley also was selected by the state to administer the Right to Recovery Plus and Integrated Community Rehab Services grants. Our unique blend of integrated programs and mental health expertise allows us to bring state-based initiatives like these to the local level.

In addition to these new projects, Zumbro Valley Mental Health Center continues to work with Olmsted County and Family Service Rochester to offer the "Children's Mental Health Resource Center" for case management and early intervention of children in the community; collaborate with Fillmore County Social Services to provide psychiatric services and support programs to its residents; and team with Fillmore Central School District to provide mental health services in the schools through the "Root River Program."

# Board of Directors & Leadership Team

## Board of Directors

Lynn Skinner, President – Olmsted County  
Mark Brown, Vice-President – At Large  
Shirley Anderson, Secretary/Treasurer – At Large  
Thomas Bellinger, Past President – Olmsted County  
Jeff Allman\* – Olmsted County  
Shirley Anderson – At Large  
Rodney Bercier – Olmsted County  
Don Boyum – Fillmore County  
Fran Bradley – At Large  
James Colville – Olmsted County  
Travis Frydenlund – At Large  
Jennifer Judge – Wabasha County  
Loyal Nelson – Olmsted County  
Marc Prestby – Fillmore County  
Stephen Rose – At Large  
Daniel Shine, M.D. – At Large  
Jon VanLoon, M.D. – Olmsted County  
Paul Wilson – Olmsted County  
Warren Wong – Olmsted County

## Leadership Team

Patricia Carlson, Executive Director  
Alice Adamson, Housing Services  
Mark Bronson, Clinical Director  
John Carlson, Chief Operating Officer  
Judy Eichman, Chemical Health Services  
Heather Geerts, Residential Services  
Tracy Lee, Human Resources  
Tina Nunemacher-Tews, Community Support Programs  
Sean Rice, Marketing and Development  
Wendie Rucker, Executive Associate  
Annette Smick, M.D., Medical Director

\*Mr. Allman served on the Board from January to August in 2008.

# Financial Statement

Like those for many non-profits, the past year was a financial challenge for Zumbro Valley Mental Health Center. A combination of operational and one-time losses significantly contributed to the financial shortfall experienced in 2008. For instance, we received \$1 million less than anticipated from the sale of three buildings, resulting in \$535,000 of debt on buildings we no longer owned.

Although ending with a financial loss, the organization saw numerous improvements to its finances, including:

- Concluded successful two-year capital campaign that raised more than \$500,000
- Improved cash flow and decreased the number of days from service to payment
- Received funding from federal and state resources to launch new programs – Flood Recovery Partners and Intensive Community Rehabilitation Services
- Negotiated higher payments from Medicaid and Olmsted County for appropriate services
- Gained better understanding of costs associated with operating new campus
- Decreased losses compared to previous year

## Zumbro Valley Mental Health Center Zumbro Valley Mental Health Foundation Combined Statements of Financial Position December 31, 2008 and 2007

ASSETS	2008	2007
<b>Current Assets</b>		
<i>Cash and cash equivalents</i>	\$120,870	\$117,581
<i>Accounts receivable, net of allowance</i>	\$685,826	\$968,853
<i>Prepaid expenses and other</i>	\$12,496	\$104,311
<b>TOTAL CURRENT ASSETS</b>	\$819,192	\$1,190,745
<b>Property and Equipment, net of depreciation</b>	\$7,790,291	\$8,367,919
<b>Other Assets</b>	\$195,294	\$229,864
<b>TOTAL ASSETS</b>	\$8,804,777	\$9,788,528
<b>LIABILITIES AND NET ASSETS</b>	<b>2008</b>	<b>2007</b>
<b>Current Liabilities</b>	\$1,738,707	\$1,739,756
<b>Long-Term Debt</b>	\$6,331,302	\$6,855,890
<b>Net Assets</b>	\$734,768	\$1,192,882
<b>TOTAL LIABILITIES AND NET ASSETS</b>	\$8,804,777	\$9,788,528

Zumbro Valley Mental Health Center  
 Zumbro Valley Mental Health Foundation  
 Combined Statements of Activity and Changes in Net Assets  
 For the Years Ended December 31, 2008 and 2007

PUBLIC SUPPORT AND REVENUES	2008	2007
<b>Patient Revenues:</b>		
<i>Private pay</i>	\$173,027	\$301,935
<i>Olmsted County</i>	\$2,787,875	\$2,490,127
<i>Fillmore County</i>	\$158,151	\$231,327
<i>Other County</i>	\$366,156	\$443,074
<i>Medical assistance</i>	\$2,858,687	\$2,072,473
<i>Third party payers</i>	\$1,643,361	\$1,394,420
<i>Consolidated CD treatment</i>	\$109,365	\$215,392
<b>Grants</b>	\$914,335	\$117,360
<b>Investment</b>	(\$7,671)	\$103,366
<b>Capital contributions</b>	\$151,213	\$161,079
<b>Gain on sale of assets</b>	\$36,622	\$257,648
<b>Other income</b>	\$144,746	\$158,767
<b>TOTAL PUBLIC SUPPORT AND REVENUES</b>	<b>\$9,335,867</b>	<b>\$7,946,968</b>
EXPENSES	2008	2007
<b>Program services:</b>		
<i>Fillmore Community Support</i>	\$95,707	\$89,169
<i>Community Support Programs</i>	\$1,659,396	\$1,878,114
<i>Psychotherapy and CMHRC</i>	\$1,322,109	\$1,149,185
<i>Recovery Programs</i>	\$639,318	\$578,717
<i>Flood Recovery Program</i>	\$315,829	\$49,382
<i>Intensive Community Rehab Services</i>	\$115,342	
<i>Psychiatry</i>	\$940,745	\$897,923
<i>Connections and Referral Unit</i>	\$1,307,833	\$1,144,891
<i>IRTS Program</i>	\$1,106,774	\$788,247
<i>Thomas House Board and Lodge</i>	\$81,007	\$69,711
<i>Root River Day Treatment</i>	\$171,749	\$114,528
<i>Homeless Program</i>	\$454,009	\$407,188
<b>TOTAL PROGRAM SERVICES</b>	<b>\$8,209,818</b>	<b>\$7,167,055</b>
<b>Supporting services</b>	<b>\$1,584,163</b>	<b>\$1,294,336</b>
<b>TOTAL EXPENSES</b>	<b>\$9,793,981</b>	<b>\$8,461,391</b>
<b>INCREASE (DECREASE) IN NET ASSETS</b>	<b>\$(458,114)</b>	<b>\$(514,423)</b>

# Recognition

## Partners

Mayo Clinic

## Builders

IBM

## Supporters

Mayo Clinic – Dept. of Facilities  
Kuehn Motor Company  
Fraternal Order of Eagles  
Golden Living Center – Rochester West  
Tom and Margie Bellinger  
Zumbro Valley Board of Directors  
Zumbro Valley employees  
Tom and Pat Carlson  
Annette Smick

## Fellows

Robert and JoAnn Fiss  
Alice Adamson  
Mark Bronson  
Tracy Lee  
Sean Rice  
Jason Schweitzer

## Grants

Minnesota Dept. of Health –  
Office of Rural Health & Primary Care  
Minnesota Dept. of Human Services  
United Way of Olmsted County

## Friends

Jeff and Mary Pat Cole  
Jennifer Judge  
Ooh La La Salon & Spa  
Steve Wasz  
Whistle Binkies  
Marcy Allen  
Shery Block  
Jesse Buchner  
John Carlson  
Gabrielle Dudlext  
Judith Eichman  
Jeremy Felder  
Julie Gordon  
Corey Kanz  
Sarah Lee  
Tina Nunemacher-Tews  
Dawn Nuss  
Jacqueline Pearson  
Amy Pyron-Hugo  
Wendie Rucker  
Gary Rustin  
Leanne Stroh  
Nicole Vickberg  
Janet Whitaker  
Mark Brown  
Country Inn & Suites  
Hiller Carpet  
Schmidt Goodman  
Shops on Maine  
Mike Vail  
Westfire Grille  
Philip and Sue Wheeler

# Our History

A college freshman, hearing voices and afraid to leave her dorm room; a single mother, secretly drinking before the kids even leave for school; a middle school student living in foster care and acting out in class; a former business man, now homeless and alone... These are the people whose lives have been changed by Zumbro Valley Mental Health Center.

The roots of Zumbro Valley Mental Health Center can be traced back to 1957 when the state legislature passed the Minnesota Mental Health Center Act. In the same year, the Rochester-Olmsted County Mental Health Clinic opened as part of the Rochester-Olmsted Public Health Center, providing outpatient clinic-based mental health services for residents of Olmsted County. In 1966, the clinic was officially named Zumbro Valley Mental Health Center, Inc. and services expanded to Fillmore, Olmsted and Goodhue counties.

Today, Zumbro Valley Mental Health Center enhances the quality of life for residents in southeastern Minnesota by serving as a community resource for the understanding and treatment of mental health and substance use disorders. Our 160 employees work closely with agencies, schools, non-profit groups and others to provide programs dedicated to improving the mental health of adults, adolescents and children.



***“Your staff – from the front desk to my case manager to my therapist – is very caring.”***

*– Community Support Programs Client*



***“When I need help or advice, Zumbro Valley is, and has always, been available to me when I need it the most.”***

*– Chemical Health Services Client*

***"A+. I am very pleased with all the services through Zumbro Valley Mental Health Center."***

*- Multiple Programs Client*



***"The staff is very professional while also being very empathetic to our child's needs."***

*- Psychiatry Client*



Main Office  
343 Wood Lake Drive SE  
Rochester, MN 55904  
Phone: 507-289-2089  
Fax: 507-289-2327  
[www.zumbromhc.org](http://www.zumbromhc.org)

Fillmore County Office  
65 Main Avenue North  
Harmony, MN 55939  
Phone: 800-422-0161  
Fax: 507-886-1490  
[www.zumbromhc.org](http://www.zumbromhc.org)

Mower County Office  
105 11th Avenue NE  
Austin, MN 55912  
Phone: 507-440-9491  
Fax: 507-434-4795  
[www.zumbromhc.org](http://www.zumbromhc.org)