



Board of Directors Meeting

Wednesday, November 27, 2024, 11:00am

Virtual via GoToMeeting

AGENDA

	Action Needed	Attachment
Roll Call		
CALL TO ORDER		
APPROVAL OF OCTOBER MINUTES	✓	✓
<u>Board Chair's Report</u> New Board Member Kimberly Stanfield		
<u>President and CEO Report</u> Strategic Planning Update		
<u>PROGRAM / QI COMMITTEE</u>		
Annual TO Approval	✓	✓
Policy Chart	✓	✓
Provider Service Plan	✓	✓
FY 2025 Service Area Completion (SAC) Application (with Finance)	✓	✓
<u>FINANCE</u>		
Financials	✓	✓
Procurement Summary for Roof Mound St	✓	✓
FY 2025 Service Area Completion (SAC) Application (with Program)	✓	✓
Federal Legislative Mandates Grant Funding Limitations Policy	✓	✓
Investment Report	✓	✓
<u>HUMAN RESOURCES COMMITTEE</u>		
Re-Privileging	✓	
Dr. Scarnati – Psychiatrist		
Emily Hostetler – Nurse Practitioner		
Sarah Hurst Pelfrey – Therapist/Coordinator		
Martha White - Therapist		
Dr. Kovell-Psychiatrist		
New Privileging – Holly Raridon, Therapist	✓	
<u>GOOD THINGS</u>		
Tami Speakman was interviewed by Anna Hoffman from NBC4 for Homeless Awareness Week. The segment will air Tuesday 11/26.		
Southeast was featured in the 2024 Columbus Monthly Giving Guide.		
Adjournment		

*denotes emailed later



**Board of Directors
Meeting Minutes
October 23, 2024, 5:30PM
Virtual GoToMeeting**

Members Present:

Rev. Tony Burns, Chairperson
Angela Fry, VP
Kori Manus, Treasurer
Steve Sielschott, Secretary
Tom Shanahan
Dave Lane, Immediate Past
Chair
Dianne Fidelibus
Art DeLeon
Kate Hamilton

Members Excused:

Eileen Goodman
Pat Halaiko
Sarah Lenkay

Absent:

SE Staff:

Bill Lee, President and CEO
Wendy Williams, COO
Rebecca Carr, CFO
Loraine Maguire, VP of Healthcare
Melissa Miller, Director of Human Resources
Sandy Stephenson, Project Director of
Special Projects
April Welch, Executive Assistant

Call to Order: Tony Burns called the meeting to order at 5:34pm and a quorum was confirmed.

Approval of Board Minutes – Kori Manus moved to approve the September board minutes, and Dave Lane seconded. Motion approved.

President and CEO Report –

Curt Moody

Bill Lee announced the passing of Curt Moody, the former founder and CEO of Moody Nolan.

Strategic Plan Retreat

Phil Cass will be conducting Southeast's strategic plan retreat on 11/11 and 11/12. The dinner will be held from 5:30pm to 8:30pm and 11/12 will be an all-day conference. The retreat will be held at the Quest Conference Center.

11/27/24 and Annual Meeting In Person

April will be sending a poll to determine the date and time of the November Board meeting. As of now the meeting is scheduled for 11/27 at 5:30pm but will be moved to 11/20 at 5:30pm or 11/27 at 11am due to the Thanksgiving Holiday. The annual in-person meeting will be on 12/18 at 5:30pm; more details to follow.

Board Meetings

Southeast will begin to have in-person board meetings once a quarter. Dates for quarterly meetings will be announced.

Joint Commission

Southeast was expected to have a visit from The Joint Commission in the Spring of 2025, but it seems as though the visit could be anytime in the remaining weeks of 2024. We maybe reaching out to Board members for participation during the visit.

Homeless Shelter Provider Forums

The Community Shelter Board held a forum regarding the needs of the Columbus community for housing and sustainable funding. Bill thanked Tony Burns for attending the meeting. Sustainable shelter funding meetings will be held on Monday 10/28 at 8am and Thursday 10/31 at 4pm.

Access to Healthcare Services

There is a possibility that Columbus FQHC's may be asked to take on additional patients.

New Board Members

Southeast continues to look for new board members. If Board Members are in need of an application for a potential new member please contact April.

Program Committee

Angela Fry presented Franklin Co. Board of Commissioners Health Equity Proposal, Carrollton Site HRSA Change in Scope, Hours of Operation, Policy Chart, Ryan White Part B Noncompetitive Renewal, SFY 2024 QI Annual Report, Emergency Management, EOC Plan and Goals and the HRSA New Access Point Updates.

Franklin Co. Board of Commissioners Health Equity Proposal (with Finance)

The Franklin County Board of Commissioners is accepting applications through its Community Partnership Health Equity Grants funding. The purpose of this funding is to improve physical, mental, and behavioral health, and overall well-being through increased access to care, utilization of services, and social connectedness. Southeast will focus on Reducing the overall incidence and racial disparities in occurrences of preventable diseases and improving the health of those living with chronic mental, physical, and behavioral health conditions among those struggling financially. Southeast intends to submit an application requesting funding to build on our previous efforts to address disparities in care through the Certified Community Behavioral Health Clinic and other programs. County funding will allow Southeast to expand the scope of services provided by our care coordinators, which will improve health outcomes among our patients through enhanced coordination and reduce the occurrence of disparities in healthcare access and outcomes among vulnerable groups. Funding will also be used to expand community outreach efforts, targeting groups that are at risk of experiencing disparities in healthcare access. Southeast is also exploring the possibility of adding additional staff to provide assistance supporting patients to access public benefits, including SSI, Medicaid and insurance through the Health Exchange, for which they may qualify. Funding will be provided as an expense-based block grant. Kori Manus noted that the budget is not included because one is not required when applying. The deadline for the application is 10/25/2024. The funding period is for one year starting 1/1/2025.

Motion

Angela Fry moved The Board of Directors of Southeast Healthcare hereby approves the submission of an application to the Franklin County Board of Commissioners through the Community Partnership Health Equity grant funding opportunity for up to \$500,000 by 10/25/2024;

FURTHER RESOLVED, the Board of Directors of Southeast Healthcare hereby authorizes the President & CEO to prepare, sign, and submit all documents required for inclusion in the proposal, and to execute all subsequent agreements necessary to receive funding. Kori Manus seconded. Motion approved.

Carrollton Site HRSA Change in Scope

Southeast Healthcare will submit a change in scope request to HRSA to relocate our Carrollton service site from 783 Jones Avenue, Carrollton, OH 44615 to 611 High St NW, Carrollton, OH 44615. The service area covered by this site will remain the same, as will the scope of services provided. The relocation to the new site will be completed by the end of the month. The new facility is located less than one mile away. HRSA requires a change in scope submission whenever a health center adds or relocates a service site.

Motion

Angela Fry moved, the Board of Directors of Southeast Healthcare to hereby approve the submission of a change in scope to HRSA to add 611 High St NW, Carrollton, OH 44615 as a federally qualified health center site. Kate Hamilton seconded. Motion approved.

Hours of Operation by Site

As a federally qualified health center funded by HRSA, the Southeast Board of Directors is required to review and approve the hours of operation of all health center sites annually. The hours of operation for all active Southeast service sites are listed on the attached table. Van Buren Health Clinic and Friends of the Homeless Dental Clinic are not currently operating due to staffing limitations. Additional evening hours have been added at the St. Clairsville site. There are no other significant changes to the hours of operation since last year.

Motion

Angela Fry moved the Southeast Healthcare Board of Directors approves the proposed hours of operation for all FQHC and non-FQHC service sites listed on the table;

FURTHER RESOLVED, The Southeast Healthcare Board of Directors approves the submission of a change in scope to HRSA to update Form 5B: Service Sites to reflect the FQHC site hours of operation on the table. Steve Sielschott seconded. Motion approved.

Policy Chart

Southeast would like to retire the Behavioral Health policy Supervision of Community Psychiatric Support Program Services. Southeast has a more comprehensive supervision policy as well as OhioMHAS has changed their standards.

Motion

Angela Fry moved the Southeast Board to retire the policy: Supervision of Community Psychiatric Support Program Services. Dave Lane seconded. Motion approved.

Ryan White Part B Noncompetitive Renewal (with Finance)

Southeast will submit a renewal application for the Ryan White Part B program by 11/12/2024. The Ohio Department of Health's Ryan White Part B Program funds the provision of medical and non-medical case management services to individuals living with HIV or AIDS in Delaware, Fairfield, Franklin, Licking, Madison, Morrow, Pickaway, and Union counties. A majority of Southeast's Ryan White program clients live in Franklin County and many are African immigrants. HIV case management coordinate services and help people with HIV gain access to needed medical care, medications, and other benefits and emergency assistance. Southeast has received funding from the Ohio Department of Health and provided Ryan White HIV case management continuously since the mid-1990s. Southeast is submitting an application for the third of four years of renewal funding. The grant funding currently supports 5 FTE: one project coordinator, three case managers and one benefits navigator. We plan to request funding for an additional case manager and a case aide, for a total of 7 FTE. The Ryan White Part B program is funded by the Ohio Department of Health as an expense-based block grant. Ryan White funding is originally from HRSA and Southeast receives it as a pass-through from ODH.

Motion

Angela Fry moved the Board of Directors of Southeast Healthcare to approve the submission of an application to the Ohio Department of Health by 4:00 PM on November 12, 2024 to provide funding for the Ryan White Part B HIV Program, in the amount of up to \$600,000 in accordance with the application guidelines;

FURTHER RESOLVED, the Board of Directors of Southeast Healthcare hereby authorizes the President & CEO to prepare, sign, and submit all documents required for inclusion in the proposal by November 12, 2024 and to execute all subsequent agreements necessary to receive funding. Dianne Fidelibus seconded. Motion approved.

SFY 2024 QI Annual Report

The annual QI Report for the fiscal year (July 1st - June 30th), was presented. It compares the organization's performance to targets set in the annual QI Plan. Areas reviewed include volume trends, performance measures, patient satisfaction, unusual incidents, financial performance (unaudited) and the environment of care.

Motion

Angela Fry moved the Southeast Board accept the SFY 2024 QI Annual Report and the recommendation for BH visit distribution, exclude residential patients in next year's report. Establish a workgroup for process improvement for 7- and 30-day follow-up after hospitalization, evaluating current report and documentation summary to ensure data integrity. Kori Manus seconded. Motion approved.

Environment of Care Plan and Goals

The Southeast Board is required to review and approve our Environment of Care (EOC, formally Safety Management Plan) Plan and goals. Changes are identified using track changes. Outcomes are reported for each year in September, with data from September through August. The Environment of Care Committee and Quality Council have reviewed and approved the plan and goals.

Motion

Angela Fry moved the Southeast Board to approve the Environment of Care Plan, Summary and goals for CY 2025. Tom Shanahan seconded. Motion approved.

Emergency Management and Communication Plan

The Southeast Board is required to review and approve our Emergency Management (EMP) and Communication Plan. The changes are as follows: The Communication Plan, Attachment C, has been updated to reflect current staff positions. Changes to the actual Emergency Management Plan (EMP) are identified via track changes. The Quality Council has reviewed and approved the plan.

Motion

Angela Fry moved the Southeast Board to approve the Emergency Management Plan and the Communication Plan for CY 2025. Tom Shanahan seconded. Motion approved.

HRSA New Access Point Updates

The purpose of New Access Points funding is to support new health center service delivery sites to expand affordable, accessible, and high-quality primary health care for underserved communities. Award recipients will use NAP funding to provide primary health care services at new access points. Notably, NAP funding is intended to continue as ongoing annual funding of up to \$650,000 which will be rolled into our base H80 HRSA grant award after the initial one-year funding period. Health centers may apply for up to \$650,000. The application must demonstrate that the health center will provide all required health services and mental health, and substance use disorder services, including primary care services available at least 40 hours per week. Applicants must project an estimated number of patients to be served at the new site during calendar year 2026.

Southeast submitted an application for NAP funding to add a service site at 3400 Franklin St, Bellaire, OH, 43906. The service area for the proposed site includes the following zip codes: 43906 (Bellaire, OH); 43912 (Bridgeport, OH); 43934 (Lansing, OH); 43909 (Blaine, OH); 26031 (Benwood, WV); and 26040 (McMechen, WV). This application was approved by the Board of Directors at the August 2024 meeting. The total project budget is \$1,247,000, with \$650,000 projected in HRSA grant funding and \$597,000 in patient service revenue. Federal funds will pay for 7.59 FTEs, to include 2 Full Time LISW, 1 Physician, 2 Medical Assistant/LPN, 1 Registered Nurse, 1 Advanced Practice Nurse and .59 Biller. Patient Service Revenue will pay for 2 Registration staff, 1 IT staff, and .41 biller, fringe

benefits, staff training, contractual expenses, and other expenses. HRSA grant funding is expense based and can be supplemented with billings through Medicaid and private insurance. This funding will allow us to expand the FQHC footprint. It is anticipated that this funding will be rolled into Health Center Program (H80) grant awards on an ongoing basis moving forward.

Finance Committee

Kori Manus presented the Procurement Summary Heat Pump and yielded the floor to Rebecca Carr to present the Financials.

Financials

The August financial statements reflect a loss of \$427,858 and a net loss from operations in the amount of \$478,622. Southeast continues to work through the Medicaid issues which could impact the profit since we are booking revenue at a reduced amount since we are unsure of what will happen with Medicaid payments and the timeliness. The deadline for submitting claims has been extended to December. These amounts are based on conservation booking of patient receivable accounts and will continue to be adjusted based on practice management reporting processes. As discussed the goal is to have the practice management system reconcile to the financial statements. The practice management consultant, GBS, will be on site in November to streamline our processes and help us develop internal reporting. When completed, the financial statements will reflect a separate line item for allowance for doubtful accounts. Currently patient service revenue and accounts receivable are reflected at net on the face of the financial statements. The new controller starts November 4th.

Motion

Kori Manus moved to The Southeast Board to approve the August Financials. Kate Hamilton seconded. Motion approved.

Procurement Summary Heat Pump

Southeast is requesting the purchase of a 10 ton Trane horizontal water source heat pump, with a 2 stage compressor and a 9 KW electrical heat package with Silicon Controlled Rectifier to bring 3200 CFM tempered outdoor fresh air into the 3rd floor training room. The recommended vendor has the lowest quote, and a good reputation and personnel that are familiar with the 16 W. Long St. location.

Motion

Kori Manus moved the Board of Directors to approve the selection of Farber for heat pump replacement for the 3rd floor training room at 16 W. Long St. not to exceed \$86,514. This includes a 15% contingency. Dave Lane seconded. Motion approved.

Human Resources Committee

Tony Burns presented the Re-Privileging.

Re- Privileging

Kate Carpenter–Therapist
Sandra Stephenson– Director of Special Programs
Alexander Perlic– Pharmacist

Motion

Tony Burns moved to approve the re-privileging of staff. Kori Manus seconded. Motion approved.

Good Things

Tori Dimick received the Helping Hands award from the Delaware-Morrow Mental Health and Recovery Services Board.

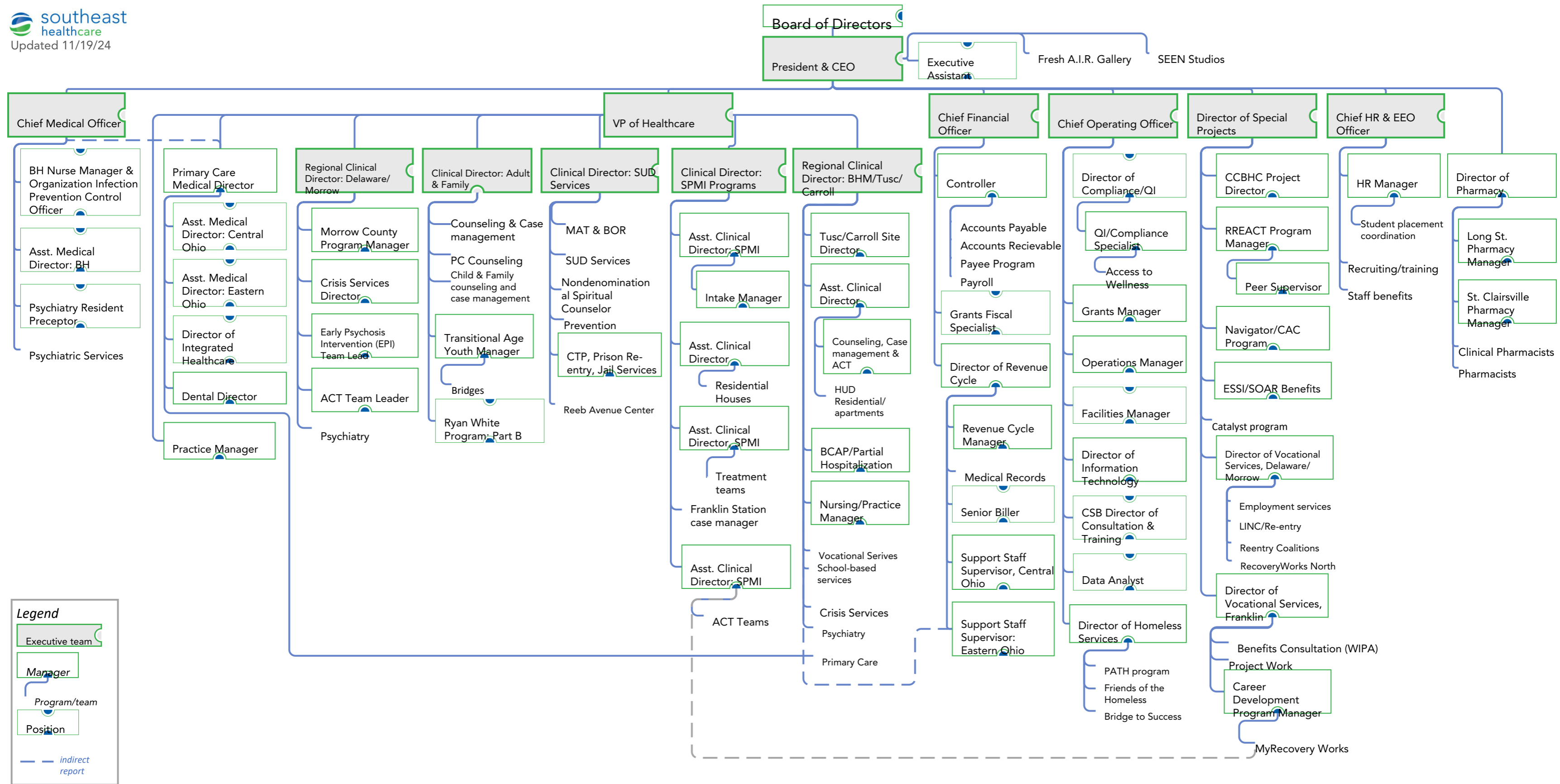
Southeast has been recognized by the American Heart Association and American Medical Association as

one of the “Practices recognized for demonstrating a commitment to measurement accuracy and having 70% or more of their adult patient population with high BP controlled.” This is the highest level of recognition.

Adjournment – Tony Burns moved to adjourn the meeting.

Board Minutes submitted by April Welch, executive assistant for Steve Sielschott, Secretary.

Steve Sielschott, Secretary



Legend

- Executive team
- Manager
- Program/team
- Position
- indirect report

Summary of Southeast Healthcare Policy Statements for Program/QI Committee Review November 2024

New policies and changes to policy statements address requirements of regulatory organizations, The Joint Commission and or HRSA standards and a reorganization of contents for increased clarity for the end user. The **Revised and new policy statements** and **Retired policies** are the action items for consideration.

	Policy for Board Review	Original SE Document Title	Southeast Doc. Number	New Policy	Policy Revision	Description/Purpose	PC, BH, or Both
1	NO SMOKING/TOBACCO USE IN SOUTHEAST FACILITIES	NA	NA	X		To provide a safe and healthy workplace and to promote the health and well-being of our workforce.	Both
New Policy Statement							
Southeast prohibits all smoking and vaping and all tobacco use regardless of type; tobacco, electronic delivery systems/smoking devices in all organization facilities, owned or leased vehicles and organization sponsored offsite gatherings.							
Revised Policy Statement							
NA							
	Policy for Board Review	Original SE Document Title	Southeast Doc. Number	New Policy	Policy Revision	Description/Purpose	PC, BH, or Both
2	Resident Valuables	Resident Funds and Valuables	32.07.01.00		X	It is the purpose of this procedure to establish guidelines for the management of resident valuables	Both
Original Policy Statement							
It is the policy of Southeast Healthcare, managing agent of Alternative Lifestyles and operator of Four Oaks, to manage and to provide for sound management of Four Oaks, including procedures for the management of resident funds and safeguarding resident valuables.							
Revised Policy Statement							
It is the policy of Southeast Healthcare, to manage and safeguard resident valuables.							

Suggested Motion:

Southeast Board approves the following new policy:
NO SMOKING/TOBACCO USE IN SOUTHEAST FACILITIES

Southeast Board approves the following policy revision:
RESIDENT VALUABLES

Provider Service Plan – Executive Summary

This Provider Service Plan presents the services currently provided by Southeast Healthcare. The Overview discusses Southeast Healthcare’s Mission, Values, and Ethics. The rest of the document is organized by service category. Within each category, the plan describes each service and identifies the location(s) and hours when the service is available, the population benefitting from the service, and the goals and scope of the service. This executive summary briefly identifies all Southeast services. The Table of Contents indicates the page numbers where more information about each service category and each individual service can be found.

Health and Wellness Services

- Comprehensive and integrated Primary Care (seven locations in central and eastern Ohio)
- Dental services (downtown Columbus)
- Specialized pharmacy providing blister packs and pharmacist counseling (Columbus and St. Clairsville)
- Mobile medical services bringing healthcare outside Southeast buildings in Franklin County and Eastern Ohio
- Auricular (ear) acupuncture services providing pain management options (Columbus)
- Ryan White HIV Client services providing education and linkage to benefits and reducing barriers to care (central Ohio)

Mental Health Services

- Individual and group counseling for those with mental health symptoms (12 locations)
- School-based counselors supporting student success (4 school districts)
- Psychiatric services including evaluation and ongoing medication and illness management (12 locations)
- Treatment teams supporting people with SPMI to manage symptoms, improve wellness and functioning, and live independently in the community (9 locations)
- Three residential facilities for those with recent psychiatric hospitalizations (Columbus and St. Clairsville)
- In-person and hotline crisis services (Morrow, Delaware, Belmont, Harrison, and Monroe Counties)
- Early Psychosis Intervention team (Delaware and Morrow Counties)

Substance Use Disorder Services

- Diagnostic assessment, counseling, case management, urine drug screens, psychiatric evaluation, and medication management (12 locations)
- Medication assisted treatment (Columbus and St. Clairsville)

- Intensive Outpatient Program (Merion Village)
- Mobile opiate response teams linking overdose victims to immediate detoxification, SUD treatment, and recovery services (Franklin County)
- Perinatal SUD counseling (Belmont, Harrison, and Monroe Counties)

Homeless Services

- Friends of the Homeless 160-bed men’s emergency shelter (Columbus)
- Bridge to Success transitional housing for those with SPMI discharged from Columbus area hospitals and facing homelessness (Columbus)
- PATH Team providing outreach, engagement, and connection with mental health services for homeless individuals with SPMI (Columbus)
- Outreach to connect homeless individuals in the University District with needed services and support (Columbus)

Employment and Vocational Services

- Career development services aimed at placement in permanent employment for adults with SPMI/substance use disorders (Columbus, Delaware, St. Clairsville)
- Individual Placement and Support using an evidence-based model aimed at rapid job placement and support (Columbus)
- Benefits Counseling providing information and support to those living with mental illness, receiving public assistance, and desiring to return to work. (Columbus)
- Expedited SSI/SSDI and WIPA (Work Incentives Planning and Assistance services to SSI/SSDI beneficiaries.
- Project Work transitional employment program providing a supported work environment to help adults with severe mental illness/substance use disorders develop skills, overcome challenges, and ultimately be placed in permanent employment. (Columbus)

Prevention

- Four prevention programs addressing substance use risk and mental health concerns in specific target populations, including school-aged children (Columbus).

Consultation

- Consultation services provided to Franklin County School systems and Morrow County first responders and court personnel to facilitate the delivery of behavioral health services

Peer Support

- RecoveryWorks program serving adults who experience challenges with mental wellness and/or substance use disorders by facilitating access to recovery resources including peer support (Franklin, Delaware, Morrow Counties).

Criminal Justice

- Southeast’s jail in-reach services providing mental health and SUD screenings, initial service planning, and linkage to community services for incarcerated individuals to connect them with

treatment and other community resources to support a successful return to the community (Franklin, Delaware, and Morrow Counties)

- Southeast's re-entry specialist working with people in Ohio prisons with SPMI, including those with co-occurring substance use disorders, who are due to be released to Franklin County to ensure that incarcerated people are linked with the full range of services they require in order to address areas of need as quickly as possible after release from prison
- Court Navigators/Liaisons working with the Belmont County court system and six Franklin County special docket courts, including mental health and drug courts, providing screenings and diversion recommendations, assisting in determining treatment needs, and providing referrals within the community in order to ensure that people involved in the criminal justice system are receiving needed supports in the community

Fresh A.I.R. Gallery

- Fresh A.I.R. Gallery (Artists In Recovery) Gallery exhibiting the work of artists affected by mental illness and substance use disorders in two Columbus locations, giving artists a platform to share their voice and artistic vision and helping educate the community and break down stigma. SEEN studios, in Columbus' Franklinton arts district, providing up to five artists at a time a safe and welcoming space to create art.



Provider Service Plan

Updated: November 2024

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Overview

Mission

Southeast Healthcare is a comprehensive provider of mental health, chemical dependency, healthcare, and homeless services assisting diverse populations regardless of their economic status. With the belief that all people have the capacity to grow and change, we provide our services to people of all ages, cultures, races, religious preferences, genders, and sexual orientations in order to enhance wellness and recovery, thereby improving families, workplaces, and communities.

Values

1. An organizational and individual commitment to the value and legitimacy of people, including but not limited to race, gender, sexual orientation, gender identity, veteran status, disability, religion, age, and socio-economic diversity of people and communities.
2. An organizational commitment that acknowledges that traumatic experiences in our society and communities are widespread and that these experiences impact the overall behavioral, physical health and wellbeing of people. Southeast will operate with a trauma-informed philosophy that embraces the principles of safety, choice, collaboration, patient empowerment and trustworthiness within relationships with our patients and each other.
 - a. A trauma-informed organization embraces a structural and treatment framework that includes understanding, recognizing and responding to the effects of trauma. Trauma-informed organizations emphasize physical, psychological and emotional safety and help people impacted by trauma rebuild a sense of control and empowerment.
3. Client-centered services that focus on what the client needs and/or wants, the client's culture, and that consider the client's emotional, mental, physical, and spiritual well-being.
4. A "no eject, no reject" clinical policy and practice.
5. A primary focus on client strengths, including families and communities, in assessment, treatment planning, and treatment provision processes.
6. Programs and services that are accessible, available, appropriate, and acceptable to persons served by Southeast.
7. Respect and advocacy for client rights and dignity.
8. A customer service and satisfaction focus with the customer being broadly defined.
9. A commitment to quality improvement in our organizational and service environments for our staff and clients.
10. A commitment to operate with fiscal and operational integrity, efficiency and effectiveness.
11. A commitment to the support and development of all staff to reach their maximum potential.

Ethics

Southeast Healthcare is committed to insuring that the highest ethical practices are embraced by the staff and Board of Southeast Healthcare.

1. Southeast shall at all times adhere to all client information confidentiality laws and the Health Insurance Portability and Accountability Act (HIPAA) governing the organization and workforce members.
2. Southeast shall seek to ensure all admissions to the organization are appropriate to the service and level of care required by the client.
3. Southeast shall seek to continually improve its services, ensuring high quality individualized client care appropriate to the needs of the individual.
4. Southeast shall promote and market its services in ways which accurately reflect the organization's capacities.
5. Southeast shall seek to ensure that competent workforce members are providing services and that procedures are in place to assure competencies and to support workforce member development. All workforce members will meet state licensing, credentialing, or registration as required by their position and scope of duties; and workforce members will follow their professional code of ethics and conduct. Southeast workforce members shall adhere to Human Resources Policies and Procedures governing workforce members expectations.
6. Southeast shall seek to provide a safe environment for clients, workforce members, and visitors.
7. Southeast shall seek reimbursement for only the services provided and eligible for such reimbursement. Fraudulent billing and/or fiscal practices will never be tolerated.
8. Southeast shall adhere to written agreements and contractual relationships entered into by the organization and attempt to engage in a collaborative process to seek resolution to any dispute which may arise.
9. Workforce members will be aware of and adhere to Conflict of Interest Policy and Procedures and expectations. The CEO and all organizational officers must disclose to the Chair of the Southeast Board of Directors, in writing, any specifics of any plans to accept supplemental outside employment so that Southeast may determine whether such outside employment or consultancy conflicts, or has the potential or appearance of conflicting, with the interests of Southeast. Prior approval of such outside employment or consultancy is required.
10. Southeast shall not discriminate with regard to race, color, religion, age, gender, national origin, disability, sexual orientation, gender identity and/or veteran status.

Services

Health and Wellness

Primary Care

Description

Southeast provides integrated and comprehensive physical health services as a Federally Qualified Health Center (FQHC). Primary care is offered at several locations across our service area. Services include but not limited to:

- General medical care
- Care coordination
- Well and sick child checkups
- Chronic condition management
- Immunizations/vaccinations
- STI testing and PREP therapy
- Sexual health
- Family planning
- Tobacco cessation
- HIV and Hep C therapy
- Acupuncture
- Transgender medicine and consultation

Hours of Operation

Location	Days & Hours
Downtown Columbus	M-F 8am-5pm
Franklin Station	M-F 8am-5pm
Near East Side	M-F 8am-5pm
Delaware	M 8am-5pm
St. Clairsville	M-F 8am-8pm
Cadiz	M-F 8am-6pm
New Philadelphia	Every other Tues, 10am-4pm

Population

Individuals, primarily low-income and homeless individuals, who need primary care including individuals with chronic health conditions, mental illness, and other physical health needs.

Goals and scope

Southeast provides general physical health care in a comprehensive and integrated model. The goal is to improve the wellbeing and health of individuals, families and communities through treatment of illnesses and prevention of diseases.

Dental

Description

Types of services offered include:

- General Family Dentistry (Adult and Pediatric)

- Exams
- Cleanings
- Root Canals
- Restorations
- Extractions
- Dental Diagnostic X-Rays
- Oral Cancer Screenings
- Dental Sealants
- Denture Assessment and Referrals

Hours of Operation

Location	Days & Hours
Downtown Columbus	M-F 8am-5pm

Population

Individuals, primarily low-income, and homeless in need of dental care.

Goals and scope

Southeast dental services are aimed at helping patients maintain a healthy mouth, teeth, and gums through treatment and prevention of dental problems.

[Pharmacy](#)

Description

Specialized pharmacy services for our patients (does not serve the general public). Staff coordinate with a patient’s insurance provider and primary care provider to determine available coverage and obtain prior authorizations. It is our policy to avoid filling potentially addictive medications. Pharmacists assist in continuity of care and medication maintenance, also using blister packs to assist with medication adherence. Pharmacists also provide medication counseling for our patients and Clinical Pharmacist services including special diabetes management programming and Hepatitis C care.

Hours of Operation

Location	Days & Hours
Downtown Columbus	M-F 8am-5pm
St. Clairsville	M-F 8am-8pm

Population

Southeast patients who are in need of medication.

Goals and scope

Southeast’s pharmacy supports access to medications prescribed by Southeast providers for our patients.

[Mobile medical](#)

Description

Medical services are provided on mobile medical coaches to provide needed care within communities where patients live. In Franklin County, Southeast serves a large homeless population and regularly takes the mobile medical services to places where homeless individuals congregate, including camps and

shelters. In eastern Ohio, the mobile coach regularly visits partner organizations to provide services in the community and serve homeless individuals at the Salvation Army.

Hours of Operation

Location	Days & Hours
Franklin County community	Varies
Martins Ferry community	T, W 8:30am-4:30pm
Wheeling Healthright	1 st , 2 nd , 4 th Thursdays 8:30am-4:30pm
Belmont County Salvation Army	3 rd Thursdays 8:30am-4:30pm

Population

Adults, primarily low-income, homeless

Goals and scope

The goal of mobile medical services is to improve access to healthcare for the communities Southeast serves by regularly visiting sites outside our buildings. Providers regularly go out on the coaches to provide services beyond the clinics.

[Acupuncture](#)

Description

Auricular acupuncture is provided by a Physician who is trained and experienced in addressing pain management with a primary focus on persons experiencing substance use disorder. The acupuncture service occurs, as appropriate, with other pain management interventions such as Cognitive Behavioral Therapy and Medical Manual Manipulation. Clients with pain sometimes turn to opioids/heroin for self-management. Many are unaware of alternative pain treatment options. Southeast provides these services to our clients with substance use disorders and pain and as prevention for those with pain who are not experiencing SUD and will take referrals from other providers in our community.

Hours of Operation

Location	Days & Hours
Downtown Columbus	As needed, M-F 8am-5pm

Population

Southeast patients who would benefit from acupuncture services, to assist with substance use disorders and pain management.

Goals and scope

Southeast primary care and behavioral health providers identify patients involved in substance use treatment who may benefit from acupuncture services based on their challenges with substance use disorders and chronic pain. The goal of this service is to prevent the prescribing of opioids as a pain management intervention and provide an alternative pain treatment option.

[Ryan White HIV Client Services](#)

Description

Southeast medical and non-medical case managers enroll clients who have been diagnosed with HIV into the Ryan White program to help pay for medical care, HIV related lab work, and medication. Case managers enroll clients in the Ohio Drug Assistance Program (OHDAP) to access medication, prescription

co-pay assistance, and insurance premium assistance if needed. Case managers provide education and information about medication adherence, safer sex practices, eligibility guidelines and limits of the program. They help clients disclose their HIV status to family and friends if needed. They refer and link clients to programs for housing and utility assistance, substance use treatment and mental health treatment if needed. Case managers and the benefits navigator assist clients with obtaining Medicaid, Medicare, or health insurance through the Affordable Care Act (ACA) to address inequities in medical coverage and ensure that clients have access to care. They educate clients about the importance of compliance with and strategies for managing HIV treatment regimens.

Hours of Operation

Location	Days & Hours
Merion Village	M, T 8am-6:30pm, W,R,F 8am-5pm
Locations to meet client needs	To fit client schedules

Population

Persons living with HIV with income under 500% of the Federal Poverty Level (FPL) in Franklin, Delaware, Fairfield, Licking, Madison, Morrow, Pickaway, and Union Counties.

Goals and scope

The goal of Southeast’s Ryan White client services is to improve access to and retention in medical and support services that mitigate and eliminate barriers to HIV care, thereby improving health care outcomes. Our services help clients maintain adherence to treatment and achieve viral suppression.

Mental Health

Counseling

Description

Southeast provides individual and group counseling services for patients who experience symptoms of mental illness (including those who are dually diagnosed with co-occurring disorders). Counseling is often provided together with psychiatric services to help manage symptoms. Counselors work with Psychiatrists and a Psychiatric Nurse Practitioner to prescribe medication, monitor symptoms, and psychiatric nurses are available to assess health and manage psychiatric medication. Counseling goals and objectives are listed on the individualized treatment plan along with strengths, challenges, services, and supports needed to improve health, functioning, and quality of life. Counseling groups with specific content are available for people who experience common issues and problems.

Hours of Operation

Location	Days & Hours
Downtown Columbus	M-F 8am-5pm
Franklin Station	M-F 8am-5pm
Near East Side	M-F 8am-5pm
Merion Village	M, T 8am-6:30pm, W,R,F 8am-5pm
Delaware	M, W-F 8am-5pm; T 8am-8pm
Morrow	M-W, F 8am-5pm; R 8am-8pm
St. Clairsville	M, R, F 8am-5pm; T, W 8am-8pm
Woodsfield	M-F 8:30am-5pm

Location	Days & Hours
Cadiz	M-F 8am-4:30pm
Martins Ferry	M-F 8am-8pm
New Philadelphia	M-F 8am-4:30pm
Carrollton	M-F 8am-4:30pm

Population

The target population for this program is individuals who experience symptoms of mental illness, including anxiety, depression, stress from situational problems, trauma, hoarding, and other symptoms. Services are provided to adult patients as well as youth ages 5-18 and their families.

Goals and Scope

The overarching goal is to assist participants in using their existing problem-solving skills more effectively and developing new or better coping skills.

School-Based Counseling

Description

Southeast school-based counselors work with the children and families within their school district providing access to behavioral health services.

At Columbus Scioto, a Therapist provides trauma-oriented interventions, including EMDR.

Hours of Operation

Location	Days & Hours
Shadyside Schools	M-F 7am-3pm
Belmont County Schools	M-F 7am-3pm
Monroe County Schools	M-F 7am-3pm
St. Clairsville (BCAP program)	M-F 7am-3pm
Columbus Scioto 6-12	M-F 7am-3pm

Population

The target population is any individual (child or adult) requesting assistance from one of Southeast's school counselors within the four school districts in which we operate.

Goals and Scope

Southeast school-based counselors provide counseling services for students who experience symptoms of mental illness. Counseling is often provided together with psychiatric services to help manage symptoms. Counselors work with Psychiatrists and a Psychiatric Nurse Practitioner to prescribe medication, monitor symptoms, and psychiatric nurses are available to assess health and manage psychiatric medication. Counseling goals and objectives are listed on the individualized treatment plan along with strengths, challenges, services, and supports needed to improve health, functioning, and quality of life. A primary goal of school-based counseling services is to provide supports to enable students to be successful in the school environment.

Psychiatry

Description

Southeast provides comprehensive psychiatric evaluation, ongoing psychiatric services including pharmacological management, nursing, laboratory and ongoing illness management services for people experiencing symptoms of a mental disorder. and/or co-occurring disorders. Psychiatrists and Nurse Practitioners provide ongoing monitoring of symptoms and reactions to medication. They provide illness and medication education, collaborate with other healthcare professionals, order testing and referrals for specialized services as needed. The Psychiatric Clinic includes Psychiatrists, Nurse Practitioners, RN's, LPN's and MA's. These staff members work collectively, based on their license, to provide psychiatric evaluation, diagnosis, and treatment including ordering medication to assist in reducing and managing symptoms and improving health, wellness, and functioning.

Hours of Operation

Location	Days & Hours
Downtown Columbus	M-F 8am-5pm
Franklin Station	M-F 8am-5pm
Near East Side	M-F 8am-5pm
Merion Village	M-F 8am-5pm
Delaware	M, W-F 8am-5pm; T 8am-8pm
Morrow	M-W, F 8am-5pm; R 8am-8pm
St. Clairsville	M-F 8am-8pm
Woodsfield	M-W, F 8am-5pm; R 8am-8pm
Cadiz	M-F 8am-4:30pm
Martins Ferry	M-F 8am-8pm
New Philadelphia	M-F 8am-4:30pm
Carrollton	M-F 8am-4:30pm

Population

Persons served are individuals 18 and older, living with serious and persistent mental illness (SPMI) and individuals with co-occurring disorders such as substance use and developmental disabilities.

Goals and Scope

The primary goal of psychiatric services is to assist in reducing and managing symptoms and improving health, wellness, and functioning.

Case Management/Therapeutic Behavioral Services (TBS)/Psychological Rehabilitation (PSR)

Description

Southeast uses a team approach for individuals who experience serious and persistent mental illness (SPMI), including those with co-occurring substance abuse disorders. General treatment teams are organized to address the needs and challenges of people with SPMI who have achieved a level of stability in the community and have somewhat less intensive service needs than those served by specialized teams. Specialized teams focus on serving patients living with SPMI who have complex or specialized needs, such as those with criminal justice system involvement or co-occurring disorders. Teams use a multi-disciplinary staff approach with Case Managers, Psychiatrists, and Psychiatric Nurses

working with the teams. Mental health case managers work closely with their patients to develop treatment plans that are properly targeted at the patient’s needs. This involves a thorough assessment of the patient’s psychosocial triggers, strengths, and personal needs.

Community psychiatric supportive treatment (CPST) service provides an array of services delivered by community based, mobile individuals or multidisciplinary teams of professionals and trained others. Services address the individualized mental health needs of the client. They are directed towards adults, children, adolescents and families and will vary with respect to hours, type and intensity of services, depending on the changing needs of each individual. The purpose/intent of CPST services is to provide specific, measurable, and individualized services to each person served. CPST services should be focused on the individual's ability to succeed in the community; to identify and access needed services; and to show improvement in school, work and family and integration and contributions within the community. Therapeutic behavioral services (TBS) and psychosocial rehabilitation (PSR) services are an array of activities intended to provide individualized supports or care coordination of healthcare, behavioral healthcare, and non-healthcare services. TBS and PSR may involve collateral contacts and may be delivered in all settings that meet the needs of the individual.

Hours of Operation

Location	Days & Hours
Downtown Columbus	M-F 8am-5pm
Delaware	M, W-F 8am-5pm; T 8am-8pm
Morrow	M-F 8am-5pm
St. Clairsville	M-F 8am-8pm
Woodsfield	M-F 8:30am-5pm
Cadiz	M-F 8am-4:30pm
Martins Ferry	M-F 8am-8pm
New Philadelphia	M-F 8am-4:30pm
Carrollton	M-F 8am-4:30pm

Population

The target population for this program is adults who experience serious and persistent mental illness (SPMI), including those with co-occurring substance use disorders and children experiencing mental health symptoms. Individuals referred to general treatment teams are identified during the intake process that includes completion of a diagnostic assessment and screening tools. Referrals can also be made by other internal programs including primary care, MAT or counseling services. To be eligible for one of these treatment teams the individual must have an SPMI diagnosis and demonstrate a need for case management services that includes deficits in daily functioning due to their psychiatric symptoms.

Goals and Scope

Treatment teams and case management services are provided with the goal to stabilize symptoms, improve functioning and quality of life, and help people live independently in the community. Treatment Teams help people make progress in recovery and strive to decrease psychiatric hospitalizations and use community alternatives when relapse occurs. Services are designed to help people move beyond stability toward a quality of life that has meaning and rewards using a Recovery Model of intervention.

Activities of the CPST service consist of one or more of the following:

- Ongoing assessment of needs;
- Assistance in achieving personal independence in managing basic needs as identified by the individual and/or parent or guardian;
- Facilitation of further development of daily living skills, if identified by the individual and/or parent or guardian;
- Coordination of the ISP;
- Symptom monitoring;
- Coordination and/or assistance in crisis management and stabilization as needed;
- Advocacy and outreach;
- As appropriate to the care provided to individuals, and when appropriate, to the family, education and training specific to the individual's assessed needs, abilities and readiness to learn;
- Mental health interventions that address symptoms, behaviors, thought processes, etc., that assist an individual in eliminating barriers to seeking or maintaining education and employment; and
- Activities that increase the individual's capacity to positively impact their own environment

TBS service activities include, but are not limited to the following:

- Consultation with a licensed practitioner or an eligible provider pursuant to paragraph (C) of this rule, to assist with the individual's needs and service planning for individualized supports or care coordination of healthcare, behavioral healthcare, and non-healthcare services and development of a treatment plan;
- Referral and linkage to other healthcare, behavioral healthcare, and non-healthcare services to avoid more restrictive levels of treatment;
- Interventions using evidence-based techniques;
- Identification of strategies or treatment options;
- Restoration of social skills and daily functioning; and,
- Crisis prevention and amelioration

PSR service activities include, but are not limited to the following:

- Restoration, rehabilitation and support of daily functioning to improve self-management of the negative effects of psychiatric or emotional symptoms that interfere with a person's daily functioning;
- Restoration and implementation of daily functioning and daily routines critical to remaining successfully in home, school, work, and community; and,
- Rehabilitation and support to restore skills to function in a natural community environment.

Assertive Community Treatment (ACT)

Description

ACT is an evidence-based practice that improves outcomes for people with severe mental illness who are most at-risk of psychiatric crisis and hospitalization and involvement in the criminal justice system. ACT is a multidisciplinary team approach with assertive outreach in the community. ACT teams provide intensive treatment including assessment, outreach and engagement, case management, care

coordination, crisis intervention and peer support. These teams participate in regular fidelity reviews through the Case Western Reserve University’s Coordinating Center of Excellence.

NOTE: not billed as a bundled ACT service under OMHAS.

Hours of Operation

Location	Days & Hours
Downtown Columbus	M-F 8am-5pm
Delaware/Morrow	M-F 8am-5pm (after-hours on call)

Population

The target population consists of individuals with intensive mental health and substance use treatment needs. Individuals are identified as high utilizers of system resources including of shelters, hospitals, crisis services and jails. Many patients served by the ACT teams have histories of homelessness, criminal justice system involvement, or co-occurring disorders. These individuals need high level services to increase engagement with treatment services and to link with housing and other community resources.

Goals and Scope

Treatment teams and case management services are provided with the goal to stabilize symptoms, improve functioning and quality of life, and help people live independently in the community. Treatment Teams help people make progress in recovery and strive to decrease psychiatric hospitalizations and use community alternatives when relapse occurs. Services are designed to help people move beyond stability toward a quality of life that has meaning and rewards using a Recovery Model of intervention.

Southeast’s ACT teams based in Franklin County focus on specific target populations:

- SHINE - The target population is adults with severe and persistent mental illness and co-occurring substance use disorders who are high utilizers of system resources. The population served by the SHINE Team experiences particularly high rates of hospitalization, homelessness, evictions and incarcerations.
- EHITS - The target population consists of individuals with intensive mental health and substance use treatment needs who have a significant history of homelessness. Individuals are identified as high utilizers of system resources including of shelters, hospitals, crisis services and jails. These individuals need high level services to increase engagement with treatment services and to link with housing and other community resources.
- Criminal Justice - The target population consists of individuals with intensive mental health and substance use treatment needs who have a significant history in the criminal justice system. These individuals could be returning to the community after serving time in jail or prison, individuals who are on conditional release who need higher-level care and individuals with multiple jail incarcerations who are identified as high system resource utilizers.

Residential

Description

Southeast operates three residential facilities serving adults who experience serious and persistent mental illness with a recent psychiatric hospitalization who require a residential setting and supports to make progress toward recovery:

- Redmond House - Redmond House is a 15-bed, Class I Residential Facility licensed by the Ohio Department of Mental Health and Addiction Services. Admissions are coordinated with the Franklin County ADAMH Board. The program provides residential treatment for adult men who experience severe and persistent mental illness and recent psychiatric hospitalization who require a residential setting and supports to make progress toward recovery. Redmond House provides room and board, personal care services, and access to mental health services including Diagnostic Assessment, Psychiatric Services, Counseling and Psychotherapy, Crisis Intervention, and Community Support Program Services.
- Carpenter House - Carpenter House is an eight-bed, Class I Residential Facility licensed by the Ohio Department of Mental Health and Addiction Services. The program provides residential treatment for adult women who experience severe and persistent mental illness and recent psychiatric hospitalization who require a residential setting and supports to make progress toward recovery. Carpenter House provides room and board and personal care services and facilitates access to mental health services including Diagnostic Assessment, Psychiatric services, Counseling and Psychotherapy, Crisis Intervention, and Community Support Program Services.
- Four Oaks – Four Oaks is a 12-bed, Class II Residential Facility licensed by the Ohio Department of Mental Health and Addiction Services located in Belmont County. This program aims to meet the residential needs of persons with severe and persistent mental illness who typically have required multiple hospitalizations and have experienced ongoing instability within the community evidenced by numerous independent housing failures and numerous crisis episodes.

Hours of Operation

Location	Days & Hours
Redmond House (Franklin County)	24/7
Carpenter House (Franklin County)	24/7
Four Oaks (Belmont County)	24/7

Population

The target population is adults who experience severe and persistent mental illness with recent psychiatric hospitalization who require a residential setting and supports to make progress toward recovery. These individuals experience problems living in the community due to their mental health symptoms, medication adherence challenges, and lack of adult daily living and coping skills.

Goals and Scope

The goal of residential services is to support residents as they develop and practice basic independent living skills and learn how to manage mental health symptoms to increase successful community tenure. Residents also learn how to develop and maintain healthy relationships, increase interpersonal skills and practice effective communication skills to promote independent living.

Crisis Services

Description

Southeast provides crisis services, responding to the needs of individuals in mental health crisis by providing assessment and linkage to hospitalization when necessary. Southeast provides daytime crisis assessments to existing patients at outpatient treatment locations. Southeast currently is the 24/7 crisis

service provider in Morrow County for adults, adolescents, and children. In addition, Southeast provides 24-hour coverage for the Morrow County Jail. Services are provided both onsite at Southeast’s office in Mt. Gilead and at Morrow County Hospital. Southeast now also provides after hours crisis services to the Delaware County jail, including evenings, weekends, and holidays.

Hours of Operation

Location	Days & Hours
St. Clairsville	M-F 8am-5pm (to patients of Southeast)
Delaware	M-F 8am-5pm
Delaware County Jail	M-F 5pm-8am, Sa-Su/holidays 24 hrs.
Morrow	24/7

Population

The target population consists of individuals experiencing a crisis situation due to a mental health or substance use disorder issue. Crisis services staff are trauma-informed professionals who are prepared to response to a wide range of concerns that may be presented in a crisis situation.

Goals and Scope

Crisis services provide urgent and immediate care to persons in an emergency, due to a mental health and/or substance use disorder issue. Crisis services aim to help individuals return to their previous level of functioning keep the person served in their community with recovery supports and access to a higher level of care (e.g. linkage to hospitalization) when indicated.

[Behavioral Health Hotline Services](#)

Description

Southeast also provides 24/7 behavioral health hotline services in Belmont, Harrison, and Monroe counties in eastern Ohio and daytime crisis services to individuals who are patients of Southeast. Behavioral health hotline services provide support, intervention, and crisis management by telephone to persons in crisis and referrals to crisis intervention services as described in Ohio Administrative Code 5122-29-08.

Hours of Operation

Location	Days & Hours
Belmont, Harrison, and Monroe Counties – BH Hotline	24/7

Population

The target population consists of individuals experiencing a crisis situation due to a mental health or substance use disorder issue. Crisis services staff are trauma-informed professionals who are prepared to response to a wide range of concerns that may be presented in a crisis situation.

Goals and Scope

Behavioral Health Hotline staff members

- (a) Provide support, intervention, and crisis management by telephone to persons in crisis;

- (b) Engage in suicide prevention intervention, including inquiring if the individual has a crisis safety plan and using this information in the intervention;
- (c) Provide appropriate linkages to all needed services and other community resources, including peer recovery support as applicable;
- (d) Provide information regarding crisis services, including the local crisis center phone number, additional referral to support services as indicated; and,
- (e) Provide information and referral to immediate psychiatric and medical services when indicated, such as the crisis center or a hospital emergency room.

Early Psychosis Intervention (EPI)

Description

The EPI team closely follows the First Episode Psychosis (FEP) program model used by the OSU EPICENTER. An interdisciplinary treatment team works with the patient and family to develop a treatment plan with an emphasis on early intervention. Extensive research has demonstrated that early intervention makes the patient more likely to engage with treatment and achieve successful outcomes, including a reduction in the likelihood of psychiatric hospitalization and improvements in social and cognitive functioning.

Hours of Operation

Location	Days & Hours
Delaware	M, W-F 8am-5pm; T 8am-8pm

Population

The EPI team provides comprehensive behavioral healthcare services using an EPI treatment team model for individuals ages 15-35 residing in Delaware and Morrow Counties who have experienced a first onset of psychotic symptoms within the last five years.

Goals and Scope

This program works with clients to achieve better treatment outcomes and more successful community living as a result of early intervention. Outcomes include the following:

- Fewer or milder symptoms
- Improved quality of life
- Active engagement of family members
- Ability to be active in work or school and/or reengagement with previous work and school activities
- Rebuilding healthy social and family relationships
- Trauma resolution/building of resilience for client and family members

Substance Use Disorder Services

Substance Use Assessment, Counseling, and Case Management

Description

Outpatient substance use disorder treatment services include diagnostic assessment, Intensive Outpatient Program (Merion Village), Outpatient Program, group and individual counseling, case

management, urine drug screens, psychiatric evaluation, and medication management including medication- assisted treatment (MAT) and other services for adults. ASAM levels of care 1 and 2.1 are provided. Each person who seeks services develops a treatment plan based on strengths and challenges, treatment goals, and services and supports needed to improve health, functioning, and quality of life. Services are provided using components of the Integrated Dual Disorder Treatment (IDDT) model, including a team approach to treatment, staged-based interventions, and motivational interviewing.

Hours of Operation

Location	Days & Hours
Downtown Columbus	M-F 8am-5pm
Franklin Station	M-F 8am-5pm
Near East Side	M-F 8am-5pm
Merion Village	M, T 8am-6:30pm, W,R,F 8am-5pm
Delaware	M-F 8am-5pm
Morrow	M-W, F 8am-5pm; R 8am-8pm
St. Clairsville	M-F 8am-8pm
Woodsfield	M-W, F 8am-5pm; R 8am-8pm
Cadiz	M-F 8am-4:30pm
Martins Ferry	M-F 8am-8pm
New Philadelphia	M-F 8am-4:30pm
Carrollton	M-F 8am-4:30pm

Population

The target population is individuals aged 18 and over who experience symptoms of substance use disorder and co-occurring disorders that can be served in ASAM levels 0.5, 1 or 2.1.

Goals and Scope

Southeast uses stage-based interventions and motivational interviewing strategies to help people engage in services, avoid substance use, and make progress in recovery. Participation in community recovery groups and activities, including 12-step programs, support groups, and health and wellness activities, is strongly encouraged. Substance Use Disorder treatment is part of an integrated approach to care at Southeast, and clients are linked to a variety of treatment and support programs within the organization.

[Medication Assisted Treatment \(MAT\)](#)

Description

The MAT program combines pharmacological medications Buprenorphine (Suboxone) or Naltrexone (Vivitrol) with counseling and behavioral therapies to provide a “whole patient” approach to the treatment of substance use disorders. Clinical staff members provide assessment to determine patients’ level of need, stage of change, health status, recent treatment history, level of care, self-reported pain, and support systems available to the person in recovery. Southeast’s MAT program offers linkage to an array of services that address the needs of the patient on a holistic level, including alternative pain management and substance use disorder treatments, vocational services, and health and wellness activities. These services are offered in-house by Southeast, allowing for more frequent interaction and coordination between staff members with highly effective linkage and referral between programs.

An innovative aspect of the MAT program is Southeast’s Bridges to Opiate Recovery (BOR) program. Utilizing harm reduction, this program provides ease of entry and quick access for obtaining MAT and includes peer supporter services and motivational interviewing with a clinician. The BOR program is aimed at engaging individuals in the precontemplation stage of change as related to engaging in other substance use treatment counseling and psychosocial services.

Hours of Operation

Location	Days & Hours
Downtown Columbus	M-F 8am-5pm
Franklin Station (BOR program)	W-R 8am-5pm
St. Clairsville	M-F 8am-8pm

Population

The target population consists of adults living with substance use disorders including opioid use disorder. This program also serves patients with co-occurring substance use and mental health disorders. Many are in the pre-contemplation stage of recovery and need further support and linkage to take action for treatment.

Goals and Scope

The MAT program aims to support clients in maintaining appointments, taking medications as prescribed, reducing/eliminating use of opioids, and eventually reducing use of other substances. Individuals in this program are assisted in meeting the following outcomes: stabilization of opioid use disorder symptoms, medical evaluation, medication induction, alignment with care recommendations, and appointments, appropriate urine drug screen (UDS) results, identifying motivation for change, and referral and linkage to necessary community resources to obtain stability across life domains.

[Mobile Opiate Response Teams \(Crisis Intervention – Overdose\)](#)

Description

The Rapid Response Emergency Addiction and Crisis Team (RREACT) program is a collaborative community model providing immediate outreach response to opioid overdose and opioid use crisis situations. RREACT Outreach Coordinators respond directly to Emergency Department and EMS dispatch requests in Franklin County. RREACT team members meet patients in the Emergency Department to provide assertive engagement strategies immediately upon request. The RREACT team also conducts extensive community outreach to connect with individuals who would benefit from linkage to substance use disorder services, including individuals experiencing homelessness at risk of overdose.

The Franklin County Heroin Overdose Prevention and Education (HOPE) Task Force works with the Franklin County Sheriff’s Special Investigations Unit and 15 other Franklin County police departments. The Task Force has a team of detectives responding to fatal and non-fatal overdose (OD) cases and links overdose victims, and their family members upon request, to Southeast’s HOPE crisis intervention specialist outreach coordinator. The HOPE task force also works with the Columbus Police Department and Homeland Security to assist victims of human trafficking.

Hours of Operation

Location	Days & Hours
RREACT & Franklin County community	M-F 8am-10:30pm; Sa 9am-9:30pm; Su 9am-5:30pm

Population

The Mobile Opiate Response Teams serve opiate overdose victims, individuals with opioid use disorder (including anyone in crisis or with an history of opioid use). SE RREACT serves Franklin County residents with an opiate or substance use disorder either in local emergency departments or during community outreach. The HOPE outreach coordinator takes referrals from the Franklin County Sheriff’s Special Investigations Unit team of detectives responding to fatal and non-fatal overdose (OD) cases. HOPE also works directly with victims of human trafficking and takes “real time” referrals.

Goals and Scope

The primary goals are to enhance patients’ access to treatment, improve disposition of patients throughout the community healthcare system, and to provide a seamless systems-based approach to continuity of care. Linkage to comprehensive services is offered, which includes immediate access to inpatient detoxification admission, substance use disorder services with Medication Assisted Treatment (MAT), and recovery supports, as well as basic primary care, mental health, and preventative medical services. A community referral network of service providers is in place to support the program’s ability to access and link individuals to immediate treatment services.

Perinatal SUD Counseling

Description

This program supports pregnant and/or parenting women with children up to two years old moving towards recovery from Opioid and Substance Use Disorders. A Nurse Care Coordinator serves women meeting the above criteria to promote the building of healthy families and prevent future births of children exposed to drugs in utero. Southeast provides nursing services such as education, referrals to primary care, parenting support, behavioral and substance use disorder treatment, tobacco cessation, relapse tools, developing support networks and access to basic living resources. This support and education are provided within the women’s home environment and community.

Hours of Operation

Location	Days & Hours
St. Clairsville and Belmont, Harrison, and Monroe County community	M-F 8am-8pm and as needed

Population

Pregnant and/or parenting women with children up to two years old moving towards recovery from Opioid and Substance Use Disorders and residents of Belmont, Harrison and Monroe Counties.

Goals and Scope

The program aims to help develop healthy families by aiming to have infants born who do not require further medical care for withdrawal, as well as address individual goals of the women and families served.

Homeless Programs

Men's Shelter

Description

The 160-bed Friends of the Homeless men's emergency shelter provides basic shelter needs, housing placement assistance, and employment assistance, as well as assistance with documentation and benefits. Southeast provides shelter services as a partner agency of the Community Shelter Board.

Hours of Operation

Location	Days & Hours
Friends of the Homeless (Columbus)	24/7

Population

Single adult men experiencing homelessness in Franklin County who have no housing options other than the street, outdoors, or some other place not fit for human habitation and are referred through the Coordinated Point of Access.

Goals and scope

The primary objective of the Men's Shelter program is for clients to obtain stable housing within a short timeframe.

Transitional Housing

Bridge to Success

Description

The Bridge to Success program short-term transitional housing apartment-style independent living and support services to connect people with treatment, income and benefits, and community resources. Bridge to Success program staff members do not provide treatment services. Staff on site provide support services, and monitoring.

Hours of Operation

Location	Days & Hours
Near East Side of Columbus (multiple addresses for units)	M-F 8am-5pm, T-F 3-11pm, and Sa 11am-7pm

Population

Adults with serious and persistent mental illness who are returning to the community from TVBH, NetCare Crisis Unit, OSU Harding Hospital, Columbus Springs, Dublin Springs, Riverside or Miles House and face homelessness upon discharge from the hospital. Clients must be linked with mental health services with Southeast or another ADAMH provider in order to be eligible for the program. Clients are referred by Community Housing Network.

Goals and scope

The goal of Bridge to Success is for clients to move to permanent housing. We help clients prepare for permanent housing by connecting them with resources and ensuring they have appropriate skills.

Homeless Outreach

PATH

Description

Southeast's PATH (Projects for Assistance in Transition from Homelessness) Team provides outreach, engagement, and referral to link clients with mental health treatment, substance abuse treatment, primary health care, employment, and housing. PATH staff engage vulnerable individuals who are homeless and living in camps, on the streets, and in shelters. They work to build trusting relationships, provide assertive case management, and assist with immediate tangible needs. PATH operate as mobile coach that regularly visits identified locations throughout the community.

Hours of Operation

Location	Days & Hours
Columbus/Franklin County community	M-F 8am-8pm

Population

PATH serves individuals in Franklin County with severe and persistent mental illness who are homeless or at risk of being homeless and are not currently engaged with ongoing mental health services.

Goals and Scope

PATH's goal is to connect homeless individuals with mainstream mental health services through outreach, engagement, and referral.

University District Outreach

Description

Southeast collaborates with the University District Organization and the Ohio State University College of Social Work to conduct outreach to the University District's unhoused, homeless, and housing insecure individuals and assist with their obtaining shelter and/or permanent supportive housing. The Southeast UDO LISW links the individuals served to service providers for assessments and treatment plans for mental health, substance use disorder, and medical concerns. The UDO LISW provides on-going case management to support clients as they engage with various systems of care, helping individuals overcome barriers and assisting with access as needed to medication assisted treatment (Suboxone, Vivitrol); Narcan kits; primary care (Including Hep C, HIV, STD/STI, wound care); dental and vision services; pharmacy; mental health; individual counseling and group therapy; family supports and grief counseling; vocational service; benefits entitlements; social service supports; and transportation. The UDO LISW is a referral resource to the residents, businesses, non-profits, safety teams, and law enforcement living or operating in the University District. The UDO LISW oversees the work of students assisting the UDO LISW and other partnering agencies/non-profits to expand outreach capabilities in the University District community.

Hours of Operation

Location	Days & Hours
OSU University District	M-F 9am-5pm, plus additional evening and weekend outreach

Population

Individuals who appear to be homeless in the University District.

Goals and Scope

The goal of the program is to connect individuals served with needed services. In addition to connecting individuals at risk with needed support, the program seeks to decrease the number of calls to the OSU police to respond to the homeless population.

Employment/Vocational

Career Development

Description

Career development services include employment readiness, job development, job coaching, and career exploration. We also assist our participants with job placement and follow along support once they have moved into their new job. Employment readiness groups address things such as job interviewing skills, behavior in the work setting, proper dress and hygiene, and self-advocacy. Southeast provides access to established networks of employers and helps individuals identify job and career pathways that match their skills and interests.

Hours of Operation

Location	Days & Hours
Clintonville	M-F 7:30am-4:30pm
Delaware	M, W, F 8am-5pm; T 8am-8pm
St. Clairsville	M-F 8am-4pm and as needed

Population

Adults with severe and persistent mental illness, substance use disorders, or both.

Goals and scope

Career development services are provided toward the goal of placement in permanent employment (full or part-time). Staff also provide employer development and outreach.

Individual Placement and Support (IPS)

Description

IPS includes intakes, relationship building, resume development, job placement assistance, and follow along support after placement. Services are provided in the IPS evidence-based model. Staff support clients in learning skills that help them obtain and maintain employment through activities such as job/task analysis, goal setting, training on soft skills, job searching, completing applications and resumes, requesting accommodations, and strategies for retention and advancement. Staff are also embedded at partner agencies (CSN, North Central) to provide these vocational services. This service is part of the larger Assertive Community Treatment (ACT) model, and staff are embedded in ACT Teams at Southeast as well as partner agencies (North Central Mental Health and Community Support Network).

Hours of Operation

Location	Days & Hours
Clintonville	M-F 8am-4:30pm

Population

Adults with a history of severe and persistent mental illness who may have co-occurring substance use disorders.

Goals and scope

The IPS evidence-based model requires “zero exclusion” and all patients who wish to receive IPS services do. The IPS team is reviewed for fidelity annually. Staff work with clients toward rapid job placement and support them in maintaining work.

Benefits Counseling

Description

The Benefits Consulting program serves individuals living with mental illness who are receiving public assistance and desire to return to work. Benefits staff work with these individuals and provides a benefits analysis that reviews their benefits situation and indicates how they could be impacted by earned income. They also provide assistance with completing tax returns for individuals requesting these services.

Southeast also provides assistance with expedited SSI/SSDI. Staff assist individuals with gaining access to SSI/SSDI benefits through an expedited process and complete the determination application process, as well as monitors the applications and assists in filing appeal when initially denied.

Southeast’s WIPA (Work Incentives Planning and Assistance) program provides services to SSDI and SSI beneficiaries who are attempting to work or go to work. WIPA staff provide accurate information and counseling about the effect of work income on these benefits and programs in order for them to improve their economic position.

Hours of Operation

Location	Days & Hours
Clintonville – Benefits consulting	M-F 7:30am-4:30pm
Clintonville - WIPA	M-F 8am-4:30pm and by appt.
Downtown Columbus – E-SSI/SOAR	M-F 9am-5pm and by appt.

Population

Adults receiving vocational services or other disabled persons in Franklin County. Benefits consulting works with people receiving public assistance. The E-SSI/SOAR program serves people who meet the criteria as developed with COHHIO, the Ohio Division of Disability Determination, and the Social Security Administration. WIPA serves beneficiaries who receive benefits based on their own disabilities and covers 42 counties in central, eastern and southern Ohio.

Goals and scope

These programs assist people with gaining and retaining public assistance benefits.

Transitional Employment

Description

Project Work is a transitional employment program that provides short-term structured work experience to assist in preparing individuals for permanent employment. The program provides job coaching in the work environment including how to perform various assigned job duties, proper dress and hygiene, and appropriate behavior in the work environment. The work experience allows individuals to advance skills, increase work tolerance, and prepare for integration into a traditional workplace. Project Work secures contracts with employers in the public and private sectors to perform a variety of work activities, including cleaning services, lawn care, assistance with moving, data entry and other jobs.

Southeast’s model differs from models that require significant screening and work aptitude/skills assessment; people who want immediate work opportunity and experience can expect to be “on the job” within 14 days after application.

Hours of Operation

Location	Days & Hours
Clintonville	M-F 7:30am-4:30pm
Worksites in Franklin County	varies

Population

Adults with severe mental illness and co-occurring substance use disorders who are interested in working and want a supported environment to develop job skills and experience. A portion of people in the program have a history of felony criminal offenses which affect their ability to find and maintain employment in a traditional setting. Other consumers served by this program are homeless.

Goals and scope

The ultimate goal for people in transitional employment is to be placed into permanent employment either full or part time in the community. Work crew supervisors work with participants on developing their work skills, assisting them with interpersonal skills, and maintaining their treatment needs toward this goal. The program has been successful in working with people with significant challenges who have not been successful with other vocational training/employment programs.

Prevention

Description

Southeast operates four prevention programs in Franklin County:

- Reynoldsburg School-Based Prevention Program – The school-based Reynoldsburg City Student Assistance Program provides substance abuse prevention and mental health promotion through education, screening, brief treatment, and linkage to needed community services for students and their families. The program facilitates a substance-free lifestyle and positive mental health to improve attendance, behavior, and emotional concerns for students. Southeast staff work closely with Reynoldsburg School staff in-school to come alongside their Social Emotional Learning goals to offer universal education opportunities, selected groups, and individual interventions for indicated students.
- Youth Empowerment and Supports (YES) – provides prevention education, group activities, and individual support for youth in Columbus. Working in partnership with elementary, middle, and high schools and youth-serving organizations, the program organizes youth groups and facilitates youth-led community service activities of youths' own choosing. The program also facilitates community gatherings and school meetings to address the effects of bullying and substance use.
- Conversations about Recovery and Support (CARS) – The Conversations About Recovery and Support (CARS) program provides prevention education for neighborhood groups, service organizations, families, and neighbors that live or work with adults who are at risk for developing or are currently experiencing substance use issues.
- Youth Alternatives Program (YAP) – works with primarily LGBTQ+ youth that are at risk of substance use disorder and mental health concerns as a result of personal and environmental

factors, including youth who experience homelessness, abuse or neglect, emotional problems, and other issues. The program is designed to help youth build personal strength and resilience and develop stronger networks of support in the community. This enhanced network of supports will help youth engage in positive drug-free activities that increase community engagement, while also developing an increased knowledge of the potential harms of substance use.

Hours of Operation

Location	Days & Hours
Franklin County community	Varies

Population

The target populations vary by program:

- Reynoldsburg – High-school and middle-school students who attend Reynoldsburg City Schools
- YES – 3rd through 12th graders who are referred to the program working in partnership with elementary, middle, and high schools and youth-serving organizations
- CARS – Family and close friends of individuals using drugs
- YAP – primarily LGBTQ+ youth that are at risk of substance use disorder and mental health concerns as a result of personal and environmental factors, including youth who experience homelessness, abuse or neglect, emotional problems, and other issues

Goals and Scope

Prevention programming primarily aims to address substance use risk as well as address mental health concerns and engages individuals in positive activities and education to support positive development. The Reynoldsburg program uses screening tools with individual students to monitor effectiveness of interventions. The YES program aims to involve youth in community service projects during the year and provide guidance around protective factors and remaining drug free. The CARS program increases knowledge about substance use and available services, including educating community members about stages of change, how to help their family members and friends, and where to get treatment. The YAP program aims to increase knowledge of the risks and harms of drug use and increase the number of positive assets and protective factors for youth.

Consultation

Description

Consultation services are provided in Franklin and Morrow counties. In Franklin County staff working with the school systems provide consultation to personnel to assist in understanding student needs and strategies that may assist the student in managing the education environment. In Morrow County consultation is most typically provided to first responders and court personnel to assist in providing direction for persons that may be in crisis or experiencing symptoms of their illness.

Hours of Operation

Location	Days & Hours
Franklin	varies
Morrow	varies

Population

Organization partners such as schools, law enforcement, courts, hospitals.

Goals and scope

Consultation services facilitate exchange between a provider and a person other than a client, directed towards the development and improvement of individualized service plans and/or techniques involved in the delivery of behavioral health services.

Peer Support

RecoveryWorks

Description

RecoveryWorks is an approach to self-directed recovery for the whole person through a highly personalized approach enabled by peer support, technology training, and other resources. Recovery is achieved by giving people tools to access the supports and training they need to achieve their goals. Recovery Guides are peer staff members who are available to help consumers get started with self-directed recovery and link them to needed resources. Recovery Guides have personal experience with recovery and the ability to work effectively with people with mental health challenges and substance use disorders. Recovery Guides engage, assist, teach, support, and mentor participants so they have the tools, information, and confidence to take charge of their own recovery journey such as completion and tracking of the Recovery Journey Wheel. Recovery Guides coordinate a number of support groups and community outreach events including regular drop-in days intended to support those in recovery and raise awareness of programs and services in the community.

Hours of Operation

Location	Days & Hours
Clintonville	M-F 8am-4:30pm
Delaware	M, W-F 8am-5pm; T 8am-8pm

Population

Adults in Franklin and Delaware and Morrow Counties who experience challenges with mental wellness and/or substance use disorders.

Goals and scope

RecoveryWorks promotes recovery from mental illness and/or substance use by facilitating access to resources including peer support. The goal is to provide tools for individuals to achieve their goals and direct their own recovery.

Criminal Justice

Jail in-reach

Description

Southeast provides mental health and SUD screenings, initial service planning, and linkage to community services while people are incarcerated. Staff members engage with people in jail to establish

relationships and link them to appropriate treatment and support services upon discharge. Linkage and support are aimed at ensuring successful restoration to the community and is done in collaboration with many other community organizations.

Hours of Operation

Location	Days & Hours
Jackson Pike/James A. Karnes Jails (Franklin County)	M-F 7:30am-4pm
Delaware County Jail	M-F 9am-5pm

Population

People incarcerated in the Franklin, Delaware and Morrow County jails in need of assistance with linkage to treatment resources, experiencing mental health and substance use disorders.

Goals and scope

Jail in-reach staff screen, engage, and refer people incarcerated in jail with the goal of successfully linking them with treatment and other community resources needed to support a successful return to the community.

[Prison re-entry](#)

Description

The Re-Entry Specialist begins working with referred individuals 30 days ahead of their scheduled release date, whenever possible, in order to assess behavioral health services and other needed supports the person identifies. The Re-Entry Specialist assists individuals returning to the community to address needs such as transportation and housing and provides warm handoffs to other Southeast and community programs, to support access to the full range of services as quickly as possible.

Hours of Operation

Location	Days & Hours
Downtown Columbus/Merion Village	M-F 9am-5pm

Population

People in Ohio prisons due to be released to Franklin County living with severe and persistent mental illness (SPMI), including those with co-occurring substance use disorder.

Goals and scope

Southeast's Prison Re-Entry program works to improve the percentage of clients who attend their initial assessment for mental health and/or substance use disorder services through the use of pre-release contact, warm handoffs, and case management. This is to ensure that incarcerated people are linked with the full range of services they require in order to address areas of need as quickly as possible after release from prison.

[Court Navigation](#)

Description

Court Navigators/Liaisons work in the courts in Franklin and Belmont Counties, providing screenings and diversion recommendations to the court to enhance long-term stability and prevent individuals from slipping through gaps in the behavioral healthcare and legal systems. These services ensure that people are able to promptly access treatment services. Staff assist in determining treatment needs and

providing referrals within the community. In Belmont County, Southeast is present within all four courts, and in Franklin County in six special docket courts. Services provided include:

- Meet and educate Judges, Lawyers (private and public), Deputies, probation officers, and correction officers and provide mental health education, linkages to services, and out of area resources for defendants who are not local
- Coordinate appointments for defendants both in and out of jail, as well as coordinating with jail transportation staff to transport incarcerated individuals to Southeast offices
- Update treatment team for every Southeast client who comes to court whether or not they are court ordered
- Track court reports to make sure we are compliant with court orders including following up with the clinician and medical records
- Assist clients in expunging their criminal records
- Advise clients on proper court room behavior, dress code and decorum.

Hours of Operation

Location	Days & Hours
Franklin County Courts	M-F, 8am-5pm
Belmont County Courts	M-F, 8am-5pm

Population

Southeast serves individuals involved in the Belmont County court system and six Franklin County special docket courts including mental health and drug courts.

Goals and scope

Southeast aims to see increased utilization of the behavioral health system resources by the judges and increased use of outpatient commitments and conditional releases in Belmont County courts. The Court Navigators/Liaisons strengthen the linkage and referral process with the courts in order to ensure people involved in the criminal justice system are receiving needed supports in the community.

Fresh A.I.R. Gallery and SEEN Studio

Description

Fresh A.I.R. Gallery (Artists In Recovery) exhibits the work of artists affected by mental illness and substance use disorders. We support artists through every step of the exhibit process, including by not taking a commission on art sales. Through their experiences with us, many artists develop the resources they need to continue their careers – as well as their journey toward healing. In addition to our season of 5-6 solo or group exhibitions a year, SEEN Studios provides space for up to five Fresh A.I.R. artists at a time to create art and collaborate.

Hours of Operation

Location	Days & Hours
Franklinton gallery	Second Friday of the month 6-10 pm, other days by appointment
Franklinton studios	Open for artists’ use at any time

Population

Artists affected by mental illness and substance use disorders. Exhibitions are open for all to view and purchase art.

Goals and Scope

The goals of the gallery include supporting artists who are affected by mental illness and substance use disorders and informing the public. The gallery gives artists a platform to share their voice and artistic vision, helping educate the community and break down stigma.

Appendix: Southeast Location Addresses

Location Name	Address
Downtown Columbus	16 W. Long St. Columbus, Ohio 43215
Franklin Station	524-B W. Broad St. Columbus, Ohio 43215
Near East Side	720 E. Broad St. Suite 101 Columbus, Ohio 43215
Merion Village	1455 S. Fourth St. Columbus, Ohio 43207
Friends of the Homeless	924 E. Main St. Columbus, Ohio 43205
Van Buren Health Clinic	595 Van Buren Dr. Columbus, Ohio 43223
Redmond House	1989 W. Broad St. Columbus, Ohio 43223
Carpenter House	1699 S. High St. Columbus, Ohio 43207
Clintonville	3770 N. High St. Columbus, Ohio 43214
RREACT	1705 S. High St. Columbus, Ohio 43207
Delaware	824 Bowtown Rd. Delaware, Ohio 43015
Morrow	651 West Marion Rd., Suite A Mt. Gilead, Ohio 43338
St. Clairsville	68353 Bannock Rd. St. Clairsville, Ohio 43950
Woodsfield	37990 Airport Rd. Woodsfield, Ohio 43793
Cadiz	243 S. Main St. Cadiz, Ohio 43907
Martins Ferry	302 W. Walnut St. Martins Ferry, Ohio 43935
Shadyside School	3795 Leona Ave. Shadyside, Ohio 43947
Four Oaks	46137 National Road West St. Clairsville, Ohio 43950
New Philadelphia	3444 W. High Ave. New Philadelphia, Ohio 44663
Carrollton	611 High St. NW Carrollton, Ohio 44615

Project Summary

Prepared for the Board of Directors of Southeast, Inc.

HRSA FY 2025 Service Area Competition application (HRSA-25-017)

Project Period: June 1, 2025 to May 31, 2028 (proposed three-year project period)

Prepared by: Eric Davies, Principal Consultant, Transformative Consulting, LLC

Introduction

The Bureau of Primary Health Care (BPHC) at the Health Resources and Services Administration (HRSA) requires all Health Center Program grantees to reapply for funding every three years and, as such to renew status as a Federally Qualified Health Center (FQHC). By December 2, 2024, Southeast is required to submit the project period renewal, also known as the **Service Area Competition (SAC)** application to renew federal Health Center Program funding, which in Southeast’s case includes **Section 330(e) – Community Health Center (CHC)** and **Section 330(h) – Healthcare for the Homeless (HCH)** funding for the three-year funding period of **June 1, 2025 to May 31, 2028**.

The SAC is considered a “Competing Competition” application by HRSA for current grantees applying to serve an existing service area. However, this application is only competitive if another entity in the community applies to compete for these funds, and thus proposes to serve the same service area and target population with the same federal funding allocation. The application is not competitive at a national level even with other applications filed in the same round under the same application funding opportunity number.

The SAC application, including the budgetary items, may only include elements of the operation that are **currently in the health center (FQHC) approved scope of project with HRSA’s BPHC**. Any changes in scope of project (e.g., services, sites, service area) will need to be addressed through a separate prior approval process (change in scope requests), or through the application for, and award of, new funding grants such as a service expansion or new access point. No additional federal funding can be requested through the SAC proposal, and any increases in costs must be paid through non-federal revenue – mainly patient-related program income. This document provides a brief summary of the SAC application’s contents. HRSA’s BPHC requires health center boards to approve grant applications and the annual budget.

Key Definitions:

Patients (Unduplicated Patients): Patients are individuals **who have at least one reportable visit during the reporting year**. The term “patient” is not limited to recipients of any one service; the term is used universally to describe all persons who receive visits, as described above. The UDS Universal Report includes all patients who had at least one visit during the year that is within the scope of activities supported by the grant/designation. For each Grant Report, patients reported are those who have at least one visit during the year within the scope of project activities supported by the specific section 330 program authority.

Visits: To be counted as having met the visit criteria, the **interaction must be documented, face-to-face contact between a patient and a licensed or credentialed provider who exercises independent, professional judgment in the provision of services to the patient**. Each element of these criteria must be satisfied. **To count visits, the services rendered must be documented in a chart in the possession of the health center**. Health center staff must be considered a provider for purposes of providing countable visits. Please note: Not all health center staff who interact with patients qualify (e.g., nursing visits do not count as “visits” and are not billable as medical visits. New “care coordination visits” are the exception).

2024 Needs Assessment

Health centers are required to assess the needs of the service area and target population during every project period. Transformative Consulting, LLC, which is serving as the consulting firm and grant writers for the SAC project, is completing a Needs Assessment as part of the process. The SAC application will feature data and information from the needs analysis conducted of Southeast’s entire FQHC service area and low-income target population, including the needs and circumstances of homeless people throughout the service area. This information will feed into the narrative of the application, and going forth, can be used by the key staff and board to conduct strategic planning and develop/refine work plans as appropriate. The full needs assessment for all counties served by FQHC sites and services will be completed by December. A separate version also will be for Franklin County only that will capture data and information needed to meet the Certified Community Behavioral Health Center (CCBHC) needs assessment requirements.

Service Area Analysis: Proportion of Patients by Zip Code (75% or greater)

For each SAC, HRSA’s BPHC publishes a **Service Area Announcement Table (SAAT)** that displays the maximum federal funding allowable for the service area/SAC. The application’s **federal request cannot exceed this amount for any year of the project period.**

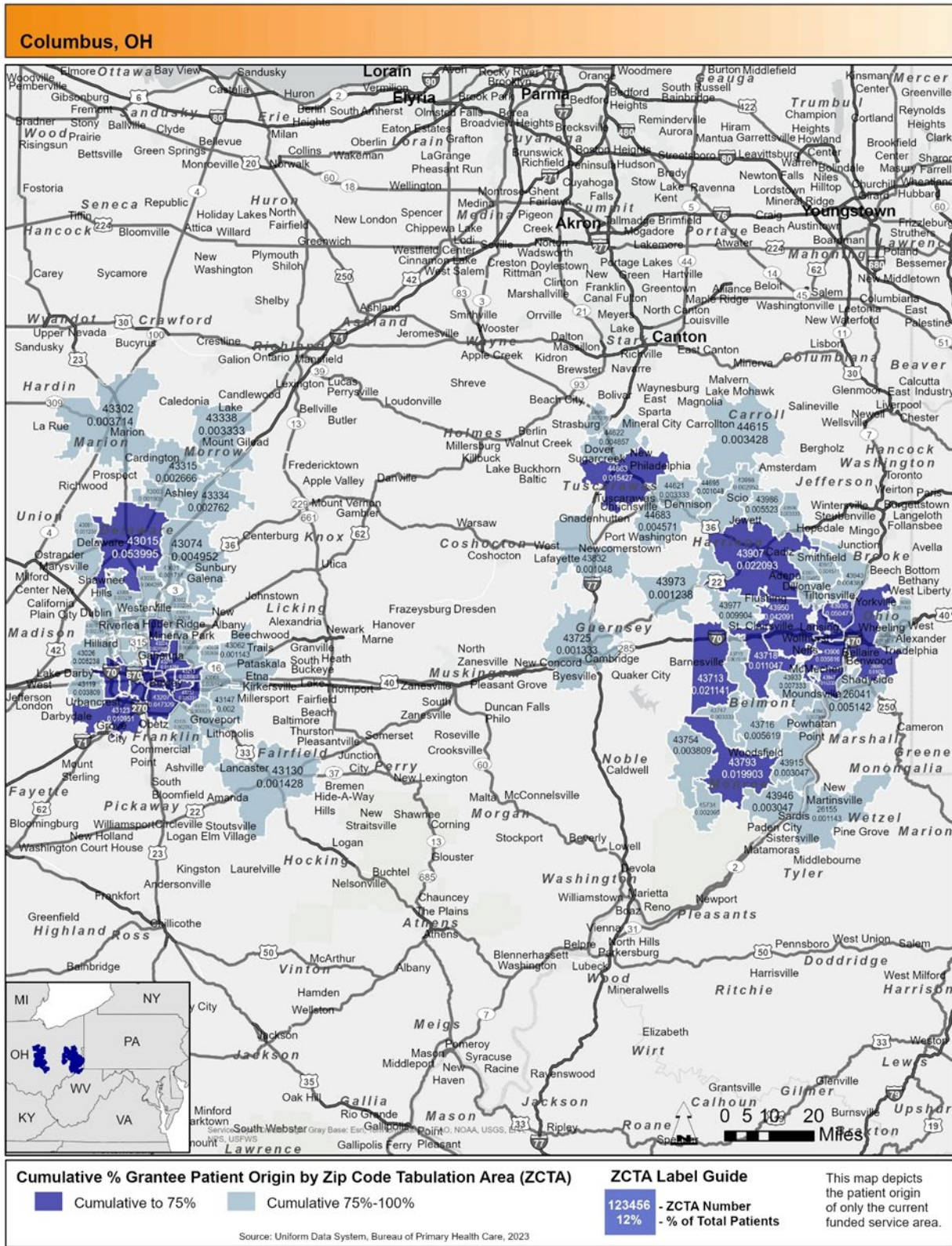
HRSA’s SAAT table also shows the **patient target** and the patients by zip code as extracted from the most recent UDS Report. In looking at the patient trend since the previous SAC was filed, the number of FQHC patients has grown significantly largely through the conversion of existing Southeast sites to FQHC; i.e., sites added to the FQHC scope of project. Since 2021, when the last SAC was submitted, the Merion Village, Carrollton, New Philadelphia and Woodsfield facilities were all brought under the FQHC scope of project. Over the past three years, the number of FQHC patients grew from 8,431 in 2021 to 11,048 in 2023. The patient target for the upcoming project period matches the 2023 total number of unduplicated patients served by the FQHC delivery system.

The SAC applicant must propose to serve a projected number of unduplicated patients that reaches, or is within 5%, of the target to apply for full funding in the SAC. The measurement year for the SAC target is the end of the 2nd calendar year (UDS reporting year) regardless of the dates of the project period; i.e., **for this project it will be by December 31, 2026 (CY 2026 UDS Report).** **Based on visit projections in the budget, it is likely the number of FQHC patients will exceed this minimum target.** The next table represents a summary of the SAAT, displaying the maximum annual federal funding request allowed for this SAC (service area) for each of the funding streams and shows the overall unduplicated patient target:

Total FQHC Funding (CHC + HCH)	CHC Funding	HCH Funding	Patient Target (by 12/31/2026)	Service types
\$3,179,100	\$1,066,260	\$2,112,840	11,048	Medical, Dental, Mental Health, Substance Use Disorder, Enabling Services

At a minimum, HRSA’s BPHC requires a service area to represent the zip codes where 75% of patients originate. The corresponding **SAAT Map** (produced by HRSA/BPHC and shown on Page 3) uses shading to show the proportion of patients from various zip codes in the service area. The dark shading shows the zip codes where 75% of patients originated in 2023. The light shading represents all other zip codes contributing patients.

Patients by zip code of origin (HRSA/BPHC-generated map): based on 2023 UDS data



The table below shows the top 15 zip codes contributing patients in 2020 and 2023. As is evident, the service area has become less weighted by patients from zip codes in Franklin County and more heavy from other counties. The 43015 city of Delaware zip code has become the largest contributor of patients, and several eastern Ohio zip codes also have become more prominent contributors.

Southeast Healthcare: FQHC Service Area

Southeast’s top 15 zip codes: 2020 & 2023

	ZIP Code	City, village or community name	County	2020 % of patients by zip code	2023 % of patients by zip code	Zip code	Community name	County
1	43215	Columbus: Central/Downtown	Franklin County	8.21%	5.1%	43015	Delaware*	Delaware County
2	43223	Columbus: Franklinton	Franklin County	6.66%	4.9%	43215	Columbus: Central/Downtown	Franklin County
3	43207	Columbus: South End	Franklin County	5.36%	4.8%	43935	Martins Ferry	Belmont County
4	43950	Saint Clairsville	Belmont County	4.36%	4.5%	43207	Columbus: South End	Franklin County
5	43204	Columbus: Hilltop	Franklin County	3.39%	4.1%	43223	Columbus: Franklinton	Franklin County
6	43205	Columbus: Near East	Franklin County	3.13%	4.0%	43950	Saint Clairsville	Belmont County
7	43935	Martins Ferry	Belmont County	3.11%	3.4%	43906	Bellaire	Belmont County
8	43906	Bellaire	Belmont County	3.08%	2.7%	43912	Bridgeport	Belmont County
9	43232	Columbus: Southeast/Eastland	Franklin County	3.01%	2.5%	43205	Columbus: Near East side	Franklin County
10	43211	Columbus: South Linden	Franklin County	2.89%	2.4%	43232	Columbus: Southeast/Eastland	Franklin County
11	43015	Delaware*	Delaware County	2.81%	2.3%	43204	Columbus: Hilltop	Franklin County
12	43227	Columbus: Eastmoor	Franklin County	2.81%	2.1%	43224	Columbus: Northland / N. Linden	Franklin County
13	43224	Columbus: Northland / N. Linden	Franklin County	2.73%	2.1%	43907	Cadiz	Harrison County
14	43213	Whitehall	Franklin County	2.40%	2.0%	43206	Columbus: South Side	Franklin County
15	43206	Columbus: South Side	Franklin County	2.35%	2.0%	43211	Columbus: South Linden	Franklin County

* Delaware city (zip code 43015) moved from #11 to #1 between 2020 and 2023.

In completing the service area analysis, a few zip codes were found to have -0- patients. Any zip codes with no patients, or a very low number of patients, should be considered for removal from the designated scope of project. Further analysis of 2024 UDS data, and 2025 UDS data, would be valuable to determine any growth trends or changes in these or other zip codes. Any zip codes that are not producing patients should be considered for removal prior to the next HRSA Operational Site Visit (OSV).

The following zip codes are shown as part of the designated service area, but produced no patients in 2023:

Designated service area zip codes No patients: Based on 2023 UDS Report		
Zip codes with no patients	Community Name	County
43066	Radnor	Delaware
44675	Sherrodsville	Carroll
44644	Malvern	Carroll
44657	Minerva	Stark / Carroll

Proposed Action:

RESOLVED, the Board of Directors of Southeast Healthcare hereby approves the submission of an application to HRSA through the FY 2025 Service Area Competition application (HRSA-25-017) in the amount of up to \$3,179,100 in accordance with the application guidelines;

FURTHER RESOLVED, the Board of Directors of Southeast Healthcare hereby authorizes the President & CEO or designee to prepare, sign, and submit all documents required for inclusion in the proposal, and to execute all subsequent agreements necessary to receive funding.

Revenue

(Totals should be consistent with information presented in the SF-424A and Form 3: Income Analysis)

REVENUE	Year 1: Federal Request- HCH	Year 1: Federal Request-CH	Year 1: Non-Federal Resources	Year 1 Total	Year 2 Total	Year 3 Total
SAC/SAC-AA FUNDING REQUEST	\$2,112,840.00	\$1,066,260.00	\$0.00	\$3,179,100.00	\$3,179,100.00	\$3,179,100.00
APPLICANT ORGANIZATION	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
STATE FUNDS	\$0.00	\$0.00	\$251,000.00	\$251,000.00	\$251,000.00	\$251,000.00
LOCAL FUNDS	\$0.00	\$0.00	\$200,000.00	\$200,000.00	\$200,000.00	\$200,000.00
OTHER SUPPORT- 340B Revenue	\$0.00	\$0.00	\$2,263,150.00	\$2,263,150.00	\$2,376,307.50	\$2,495,122.87
PROGRAM INCOME (fees, third party reimbursements, and payments generated from the projected delivery of services)	\$0.00	\$0.00	\$7,236,850.00	\$7,236,850.00	\$7,598,692.50	\$8,092,047.84
TOTAL REVENUE	\$2,112,840.00	\$1,066,260.00	\$9,951,000.00	\$13,130,100.00	\$13,605,100.00	\$14,217,270.71

Expenses

(Object class totals should be consistent with Section B of the SF-424A. This should be consistent with the services you list in Form 1A: General Information.)

PERSONNEL	Year 1: Federal Request- HCH	Year 1: Federal Request-CH	Year 1: Non-Federal Resources	Year 1 Total	Year 2 Total	Year 3 Total
All personal costs are based on current salaries with a five percent increase in year 2 and 3 consistent with historical wage increases						
ADMINISTRATION			\$750,312.00	\$750,312.00	\$787,827.60	\$827,218.98
MEDICAL STAFF	\$552,762.00	\$562,630.00	\$358,231.00	\$1,473,623.00	\$1,547,304.15	\$1,624,669.36
DENTAL STAFF	\$202,000.00	\$0.00	\$0.00	\$202,000.00	\$212,100.00	\$222,705.00
MENTAL HEALTH SERVICES	\$1,265,768.00	\$503,630.00	\$1,851,313.00	\$3,620,711.00	\$3,801,746.55	\$3,991,833.88
SUBSTANCE USE DISORDER SERVICES	\$92,310.00	\$0.00	\$0.00	\$92,310.00	\$96,925.50	\$101,771.78
PHARMACY PERSONNEL	\$0.00	\$0.00	\$481,532.00	\$481,532.00	\$505,608.60	\$530,889.03
ENABLING STAFF	\$0.00	\$0.00	\$605,366.00	\$605,366.00	\$635,634.30	\$667,416.02
TOTAL PERSONNEL	\$2,112,840.00	\$1,066,260.00	\$4,046,754.00	\$7,225,854.00	\$7,587,146.70	\$7,966,504.04

FRINGE BENEFITS	Year 1: Federal Request- HCH	Year 1: Federal Request-CH	Year 1: Non-Federal Resources	Year 1 Total	Year 2 Total	Year 3 Total
Fringe Benefits are based on current year rates with no increases in year 2 and 3.						
FICA @ 6.2%	\$0.00	\$0.00	\$472,721.00	\$472,721.00	\$470,403.10	\$493,923.25
Medical and Dental @ 10%	\$0.00	\$0.00	\$785,326.00	\$785,326.00	\$758,714.67	\$796,650.40
Retirement @ 4%	\$0.00	\$0.00	\$304,981.00	\$304,981.00	\$303,485.18	\$318,660.16
Medicare @ 1.45%	\$0.00	\$0.00	\$110,556.00	\$110,556.00	\$110,013.63	\$115,514.31
Unemployment & Workers Compensation @ .050%	\$0.00	\$0.00	\$3,812.00	\$36,129.27	\$37,935.73	\$39,832.52
TOTAL FRINGE @ 22%	\$0.00	\$0.00	\$1,677,396.00	\$1,677,396.00	\$1,680,552.30	\$1,764,580.64

TRAVEL	Year 1: Federal Request- HCH	Year 1: Federal Request-CH	Year 1: Non-Federal Resources	Year 1 Total	Year 2 Total	Year 3 Total
Travel expense for Providers and staff traveling to multiple locations to provide services-\$0.67 per 5,000 mile	\$0.00	\$0.00	\$3,350.00	\$3,350.00	\$3,350.00	\$3,350.00
Provider Training for trade associations \$1,500 per provider 20 total providers	\$0.00	\$0.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00
TOTAL TRAVEL	\$0.00	\$0.00	\$33,350.00	\$33,350.00	\$33,350.00	\$33,350.00

SUPPLIES	Year 1: Federal Request- HCH	Year 1: Federal Request-CH	Year 1: Non-Federal Resources	Year 1 Total	Year 2 Total	Year 3 Total
(Include equipment items that cost less than \$5,000 each and other supplies)						
25 laptop computers @ \$1,000 each- Southeast Follows a replacement plan of three years	\$0.00	\$0.00	\$25,000.00	\$25,000.00	\$0.00	\$0.00

Office and Printing Supplies (\$2,916.67 per month x 12 months) with a 5% increase in years 2 and 3- cost based on current expense.	\$0.00	\$0.00	\$35,000.00	\$35,000.00	\$36,750.00	\$38,587.50
Pharmaceuticals Supplies- Based on current year costs with a 3% increase in years 2 and 3.	\$0.00	\$0.00	\$2,625,000.00	\$2,625,000.00	\$2,695,876.00	\$2,776,752.28
Medical Supplies (\$7.00 per visit 5,500 Medical Visits)	\$0.00	\$0.00	\$38,500.00	\$38,500.00	\$40,425.00	\$42,446.25
Dental Supplies (\$12.00 per visit x 1,250 visits) with a 5% increase in years 2 and 3- cost based on current expense.	\$0.00	\$0.00	\$15,000.00	\$15,000.00	\$15,750.00	\$16,537.50
Housekeeping and Maintenance Supplies- this is based on current cost of supplies-with a 5% increase in years 2 and 3	\$0.00	\$0.00	\$100,000.00	\$100,000.00	\$105,000.00	\$110,250.00
TOTAL SUPPLIES	\$0.00	\$0.00	\$2,838,500.00	\$2,838,500.00	\$2,893,801.00	\$2,984,573.53

CONTRACTUAL	Year 1: Federal Request- HCH	Year 1: Federal Request-CH	Year 1: Non-Federal Resources	Year 1 Total	Year 2 Total	Year 3 Total
Laboratory Services-lab service payments- based on current year costs- with a 5% increase in years 2 and 3.	\$0.00	\$0.00	\$100,000.00	\$100,000.00	\$105,000.00	\$110,250.00
Contractual Dental and Physician Services-based on historical needs of service with a 5% increase in years 2 and 3.	\$0.00	\$0.00	\$100,000.00	\$100,000.00	\$105,000.00	\$110,250.00
TOTAL CONTRACTUAL	\$0.00	\$0.00	\$200,000.00	\$200,000.00	\$210,000.00	\$220,500.00

OTHER	Year 1: Federal Request- HCH	Year 1: Federal Request-CH	Year 1: Non-Federal Resources	Year 1 Total	Year 2 Total	Year 3 Total
<i>(Include detailed justification. Note: Federal funding CANNOT support grant-writing, construction, fundraising, or lobbying costs.)</i>						
Legal and auditing fees- based on current year costs no increases expected.	\$0.00	\$0.00	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00
EHR technical training	\$0.00	\$0.00	\$100,000.00	\$100,000.00	\$105,000.00	\$110,250.00
Facility Payment and Rent-based on current year costs with a 5% increase in years 1 and 2.	\$0.00	\$0.00	\$500,000.00	\$500,000.00	\$525,000.00	\$551,250.00
Depreciation based on current assets with a straight line depreciation	\$0.00	\$0.00	\$150,000.00	\$150,000.00	\$150,000.00	\$150,000.00
Building Maintenance- based on current year costs with a 5% increase in years 1 and 2.	\$0.00	\$0.00	\$75,000.00	\$75,000.00	\$78,750.00	\$82,687.50
Utilities- based on current year costs with a 5% increase in years 1 and 2.	\$0.00	\$0.00	\$75,000.00	\$75,000.00	\$78,750.00	\$82,687.50
EHR licensing - based on renewal schedule	\$0.00	\$0.00	\$80,000.00	\$80,000.00	\$84,000.00	\$88,200.00
Property Insurance- based on current rates in place with a 5% increase in years 1 and 2.	\$0.00	\$0.00	\$75,000.00	\$75,000.00	\$78,750.00	\$82,687.50
TOTAL OTHER	\$0.00	\$0.00	\$1,155,000.00	\$1,155,000.00	\$1,200,250.00	\$1,247,762.50
TOTAL DIRECT CHARGES (Sum of TOTAL Expenses)	\$2,112,840.00	\$1,066,260.00	\$9,951,000.00	\$13,130,100.00	\$13,605,100.00	\$14,217,270.71

INDIRECT CHARGES	Year 1: Federal Request- HCH	Year 1: Federal Request-CH	Year 1: Non-Federal Resources	Year 1 Total	Year 2 Total	Year 3 Total
<i>(Include approved indirect cost agreement in Attachment 13: Other Relevant Documents.)</i>						
X% indirect cost rate (includes utilities and accounting services)						
TOTALS (Total of TOTAL DIRECT CHARGES and INDIRECT CHARGES)	\$2,112,840.00	\$1,066,260.00	\$9,951,000.00	\$13,130,100.00	\$13,605,100.00	\$14,217,270.71

\$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00



Financial Statements
September 30, 2024

**Southeast Healthcare
Financial Report Narrative**

- The September financial statements reflect a gain of \$49,325 and a net loss from operations in the amount of \$526,380.
- We continue to work through verifying all sources of revenue for all our grant sources which could change year to date revenue.
- We continue to work through the Medicaid issues which could impact the profit since we are booking revenue at a reduced amount since we are unsure of what will happen with Medicaid payments and the timeliness. The deadline to submit claims has been extended to February; however, we continue to have issues with claims and are manually correcting each one that errors out.
- These amounts are based on conservation booking of patient receivable accounts and will continue to be adjusted based on practice management reporting processes below.
- As we have discussed the goal is to have the practice management system reconcile to the financial statements. The practice management consultant, GBS, was on site in November to help streamline our processes and help us develop internal reporting. When this is completed, the financial statements will reflect a separate line item for allowance for doubtful accounts. Currently patient service revenue and accounts receivable are reflected at net on the face of the financial statements.

SOUTHEAST HEALTHCARE
CONSOLIDATED STATEMENT OF ACTIVITY
FOR THE PERIOD ENDED SEPTEMBER 30, 2024

	FY24 BUDGET	***** ACTUAL *****		YTD BUDGET	ACT vs. BUD \$ VARIANCE	% VAR OF BUDGET
		September	YTD			
REVENUE						
<i>ADAMH FUNDING</i>						
ADAMH-FFS	\$ 5,680,000	\$ 550,112	\$ 1,930,026	\$ 1,420,000	\$510,026	35.9%
ADAMH - BLOCK GRANT	9,700,000	750,750	1,814,846	2,425,000	(610,154)	(25.2%)
ADAMH PHARMACY	2,000	0	0	500	(500)	(100.0%)
ADAMH - OTHER	-	0	0	-	-	
TOTAL	15,382,000	1,300,862	3,744,872	3,845,500	(100,628)	(2.6%)
<i>FIRST & THIRD PARTY</i>						
CLIENT FEES	128,000	27,975	43,582	32,000	11,582	36.2%
INSURANCE	1,100,000	49,767	161,058	275,000	(113,942)	(41.4%)
MEDICARE	1,000,000	45,385	144,394	250,000	(105,606)	(42.2%)
MEDICAID	13,600,000	602,062	1,976,302	3,400,000	(1,423,698)	(41.9%)
CONTRACTS	12,266,000	718,725	2,327,129	3,066,500	(739,371)	(24.1%)
PHARMACY SALES	29,000,000	2,286,299	7,448,202	7,250,000	198,202	2.7%
OTHER REVENUE	1,000,000	34,157	111,310	250,000	(138,690)	(55.5%)
TOTAL THIRD PARTY	58,094,000	3,764,370	12,211,977	14,523,500	(2,311,523)	(15.9%)
OPERATING REVENUE	\$ 73,476,000	\$ 5,065,232	\$ 15,956,849	\$ 18,369,000	(\$2,412,151)	(13.1%)
EXPENSES						
SALARIES	34,500,000	2,776,264	8,341,683	8,625,000	(283,317)	(3.3%)
EMPLOYEE BENEFITS	9,200,000	741,075	2,000,189	2,300,000	(299,811)	(13.0%)
CONTRACT SERVICES	1,550,000	120,441	301,955	387,500	(85,545)	(22.1%)
COMPUTER EXPENSE	1,200,000	49,745	209,594	300,000	(90,406)	(30.1%)
OPERATING SUPPLIES	350,000	20,711	107,772	87,500	20,272	23.2%
OPERATING EXPENSES	4,000,000	77,412	795,205	1,000,000	(204,795)	(20.5%)
OFFICE EXPENSES	500,000	216,840	286,231	125,000	161,231	129.0%
MOBILE PHONES	350,000	(733)	32,538	87,500	(54,962)	(62.8%)
TRAVEL/TRANSPORTATION	1,200,000	65,789	169,550	300,000	(130,450)	(43.5%)
BUILDING & GROUNDS	2,300,000	139,728	570,958	575,000	(4,042)	(.7%)
DEPRECIATION	750,000	46,705	140,116	187,500	(47,384)	(25.3%)
AUDIT & LEGAL FEES	300,000	36,949	54,651	75,000	(20,349)	(27.1%)
INSURANCE EXPENSE	900,000	73,563	219,614	225,000	(5,386)	(2.4%)
PHARMACY COG	16,500,000	1,228,336	3,976,162	4,125,000	(148,838)	(3.6%)
INTEREST EXPENSE	216,252	2,493	31,782	-	31,782	#DIV/0!
OTHER EXPENSES	183,748	(3,706)	(9,786)	45,937	(55,723)	(121.3%)
TOTAL EXPENSES	\$ 74,000,000	\$ 5,591,612	\$ 17,228,217	\$ 18,445,937	(\$1,217,720)	(6.6%)
OPERATING NET INCOME/(LOSS)	\$ (524,000)	\$ (526,380)	\$ (1,271,368)	\$ (76,937)	(\$1,194,431)	
<i>MISCELLANEOUS REVENUE</i>						
INTEREST INCOME	650	53	165	163	3	1.5%
INVESTMENT	1,000,000	564,261	939,843	250,000	689,843	275.9%
RENT	170,000	11,391	36,127	42,500	(6,373)	(15.0%)
GAIN/(LOSS) ON PURCHASE	-	0	0	-	-	
OTHER	-	0	0	-	0	#DIV/0!
TOTAL MISCELLANEOUS	1,170,650	575,705	976,135	292,663	683,473	233.5%
SOUTHEAST NET REVENUE	\$ 646,650	\$ 49,325	\$ (295,233)	\$161,663	(\$456,896)	
Margin on Operating Revenue	(.7%)	(10.4%)	(8.0%)			
Margin on Total Revenue	.9%	.9%	(1.7%)			

Southeast Healthcare
CONSOLIDATED STATEMENT OF FINANCIAL POSITION
FOR THE PERIOD ENDED SEPTEMBER 30, 2024

ASSETS

<i>CASH:</i>			
CASH IN BANK - UNRESTRICTED	\$	2,292,824	
SCHOLARSHIP ACCOUNT			
BUILDING MANAGEMENT		-	
PETTY CASH		3,430	2,296,254
<i>INVESTMENTS:</i>			
SHORT TERM INVESTMENTS		4,462,232	
AMERICAN FUNDS		12,000,201	
RESTRICTED INVESTMENTS		299,481	16,761,914
<i>ACCOUNTS RECEIVABLE:</i>			
Claims Based Receivables			
Total Claims Based Receivables		11,133,716	
Other Receivables			
OTHER GRANTS & CONTRACTS		(459,207)	
APOTHECARE		2,619,892	
MISCELLANEOUS		-	13,294,401
Total Other Receivables		2,160,685	
<i>OTHER CURRENT ASSETS:</i>			
APOTHECARE INVENTORY		350,795	
PREPAIDS		1,735,633	
EMPLOYEE LOAN/EPP		11,924	
OTHER		9,087	2,107,439
TOTAL CURRENT ASSETS			34,460,008
<i>FIXED ASSETS:</i>			
VEHICLES		579,879	
BUILDING, LAND & IMPROVEMENTS		12,991,583	
FURNITURE & EQUIPMENT		3,992,686	
TENANT IMPROVEMENT		174,753	
subtotal		17,738,901	
LESS accumulated depreciation		(12,217,865)	
NET FIXED ASSETS			5,521,036
TOTAL ASSETS			\$ 39,981,044

LIABILITIES & NET ASSETS

<i>LIABILITIES:</i>			
ACCOUNTS PAYABLE	\$	304,374	
ACCRUED EXPENSES		-	
PROPERTY TAX PAYABLE		65,287	
TENANT DEPOSIT		6,857	376,518
<i>ACCRUED WAGES & FRINGE BENEFITS:</i>			
ACCRUED VACATION		1,773,875	
ACCRUED PAYROLL		3,429,475	
ACCRUED RETIREMENT		-	
ACCRUED OTHER		399,869	5,603,219
TOTAL CURRENT LIABILITIES			5,979,737
<i>DEFERRED REVENUE</i>			542,604
<i>LONG TERM DEBT</i>			2,341,019
<i>ADVANCES FROM THE STATE</i>			437,771
<i>CAPITALIZED LEASE AGREEMENT</i>			156,885
TOTAL LIABILITIES			9,458,016
<i>NET ASSETS:</i>			
UNRESTRICTED		28,351,781	
DESIGNATED		1,832,654	
RESTRICTED		39,112	
SCHOLARSHIP		299,481	
TOTAL NET ASSETS			30,523,028
TOTAL LIABILITIES & NET ASSETS			\$ 39,981,044

SOUTHEAST HEALTHCARE
Statement of Cash Flows
September 30, 2024

	Current Period
Cash From Operations	
Change in net assets	49,324
Adjustments to reconcile change in net assets to net cash	
Depreciation	46,705
Unrealized and realized gains on investments, net	(658,822)
Forgiveness of advance from State of Ohio	(4,615)
Total Adjustments to reconcile change in net assets to net cash	(616,732)
(Increase) decrease in:	
Accounts receivable	271,264
Inventory	336,023
Other current assets	(123,550)
Total (Increase) decrease in:	483,736
Increase (decrease)	
Accounts payable	316,638
Accrued expenses and taxes	300,383
Total Increase (decrease)	617,021
Total Cash From Operations	533,350
Cash From Investing Activities	
Purchases of property and equipment	(50,929)
Purchase of investments	94,561
Total Cash From Investing Activities	43,632
Cash Flows From Financing Activities	
Principal payments on long-term debt	(8,345)
Principal payments on capital lease obligations	(8,488)
Total Cash Flows From Financing Activities	(16,833)
Net Increase/Decrease in Cash	560,149
Cash and Cash Equivalents, beginning of period	1,736,106
Cash and Cash Equivalents, end of period	2,296,254

SOUTHEAST HEALTHCARE RATIO ANALYSIS

Year to date performance

Current Ratio	(CURRENT ASSETS/CURRENT LIABILITIES)	5.8	Ability to pay current debt with current assets; 2 to 4 is standard.
Revenue over Expense Margin	(YTD REVENUE/YTD EXPENSES)	.965	Indicates revenues (net income) over expenses; Over 1.03 is excellent.
Assets to Liabilities	(TOTAL ASSETS/TOTAL LIABILITIES)	4.23	Indicates debt structure of Organization; 2.0 is standard.
Debt to Net Assets (Equity)	(TOTAL LIABILITIES/NET ASSETS)	.31	Compares borrowed capital to invested capital; .40 is standard.
Days of Cash	CASH & ST INVESTMENTS/AVE. DAY'S EXPENSES	36.1	Indicates number of days of cash SE has on hand. 90 days is good
Average Days in Receivables	(REVENUE/365)AR/Revenue per day)	76.60	Indicates the number of days it takes to collect our receivables

ADAMH Key Performance Indicators

	SOUTHEAST RATIO	ADAMH STANDARDS		INDEX PTS
		EXCELLENT	GOOD	
Administrative Costs to Expenses (Admin/Total expenses)	11.67%	7% - 9.99%	10% - 10.99%	3
Debt to Equity Ratio (Total Liabilities/Net Assets)	0.310	.40 - .49	.50 - 1.19	5
Revenue to Expenses (Total Revenue / Total Expense)	0.97	1.03 - 1.0599	1 - 1.0299	5
Current Ratio (Current Assets/Current Liabilities)	5.76	1.80 - 2.39	1.4 - 1.79	5
Cash to Avg. Mo. Expense (Days) (Cash + ST Invest/Total Expenses)	36.1	80 - 89.99	50 - 79.99	3
Fund Balance Reserve (Net Assets / Ave. Monthly expenses- including CGS)	2.30	6 - 6.99	4 - 5.99	5
% of Revenue from ADAMH (ADAMH Revenue/Total Revenue)	23.1%	< 55.0%	70% - 55%	5
				4.4

Index Coding
5 - Excellent
4 - Good
3 - Fair
2 - Poor
1 - Correction Required

SOUTHEAST, INC. PROCUREMENT SUMMARY

Describe Goods and Services Requested for Purchase:

Tear off old roofs and install new flat roof on 873, 875, & 877 Mound St. This facility is part of our Bridge to Success program. The project includes removing old broken clay tiles and replacing all gutters & downspouts. Southeast will use funds from Elevate grant for this project.

Vendors:

Cotterman & Company – \$57,202.00 – remove old roofs

Legacy Roofing - \$47,113.00

DeMarco Incorporated - \$61,500.00 – remove old roofs

ASI Commercial Roofing - \$74,950.00 – remove old roofs

Vendor Recommended: DeMarco Incorporated

Reason for Selection (Check all that apply):

- Price Quality of goods/services Availability of goods/services within the required timeframe
- After sale services, including availability of parts/supplies Bidder's previous records of performance and service
- Ability of bidder to render satisfactory service in this instance Payment terms Warranty offered
- Ability to provide samples Other: _____
-

Summary of Reason for Recommendation:

DeMarco had the most comprehensive, complete quote. They were one of 3 companies that got up on the roof to inspect it, instead of using a drone. They are taking everything off down to the decking, so it can be inspected and replaced as necessary. ASI and Cotterman are also taking down to decking. Legacy plans to drill bore holes so they can check the decking, without taking off both the old roofs. DeMarco has the best price for deck replacement per foot & they are the only company using 1/2" HD board which is a closed cell foam board that provides waterproofing & better insulation. They were one of two companies offering EPDM (ethylene propylene diene terpolymer – synthetic rubber), which should last a little longer than a TPO (thermoplastic polyolefin) roof. All companies offered a 20-year warranty. Demarco has an A+ BBB rating.

Recommended Motion

The Southeast Board approves the selection of DeMarco Incorporated for the Mound St. roof replacement not to exceed \$80,725. This includes a 15% contingency and up to \$10,000 for deck replacement.

Approval Date: _____

Approved By: _____

Print Name

Title

SOUTHEAST HEALTHCARE

Area: Fiscal Administration
Subject: Federal Legislative Mandates Grant Funding Limitations

Page 1 of 4
SE Doc#:

Effective Date: 11/27/2024
Issue/Revision Date:
Supersedes:

Approved by: Board of Directors
Signatory: President & CEO

PURPOSE

To ensure compliance with federal legislative mandates (FLM) for federal funding assistance.

POLICY

Southeast will comply with all applicable legislative mandate requirements of all federal laws governing financial assistance awards that limit the use of funds for HRSA grants and cooperative agreements as part of the Further Consolidated Appropriations ACT.

PROCEDURE

1. Confidentiality Agreements

None of the funds appropriated or otherwise made available by FLM Act may be available for a contract, grant, or cooperative agreement with an entity that requires employees or contractors of such entity seeking to report fraud, waste, or abuse to sign internal confidentiality agreements or statements prohibiting or otherwise restricting such employees or contractors from lawfully reporting such waste, fraud, or abuse to a designated investigative or law enforcement representative of a Federal department or agency authorized to receive such information.

2. Salary Rate Limitation

None of the funds appropriated shall be used to pay the salary of an individual, through a grant or other extramural mechanism, at a rate in excess of Executive Level II:

3. Gun Control

None of the funds made available may be used, in whole or in part, to advocate or promote gun control.

4. Anti-Lobbying

No part of any appropriation contained in this Act or transferred pursuant to section 4002 of [Public Law 111-148](#) shall be used, other than for normal and recognized executive-legislative relationships, for publicity or propaganda purposes, for the preparation, distribution, or use of any kit, pamphlet, booklet, publication, electronic communication, radio, television, or video presentation designed to support or defeat the enactment of legislation before the Congress or any State or local legislature or legislative body, except in presentation to the Congress or any State or local legislature itself, or designed to support or defeat any proposed or pending regulation, administrative action, or order issued by the executive branch of any State or local government, except in presentation to the executive branch of any State or local government itself.

SOUTHEAST HEALTHCARE

Area: Fiscal Administration
Subject: Federal Legislative Mandates Grant Funding Limitations

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No part of any appropriation contained in this Act or transferred pursuant to section 4002 of [Public Law 111-148](#) shall be used to pay the salary or expenses of any grant or contract recipient, or agent acting for such recipient, related to any activity designed to influence the enactment of legislation, appropriations, regulation, administrative action, or Executive order proposed or pending before the Congress or any State government, State legislature or local legislature or legislative body, other than for normal and recognized executive-legislative relationships or participation by an agency or officer of a State, local or tribal government in policymaking and administrative processes within the executive branch of that government.

The prohibitions in subsections (a) and (b) shall include any activity to advocate or promote any proposed, pending or future Federal, State or local tax increase, or any proposed, pending, or future requirement or restriction on any legal consumer product, including its sale or marketing, including but not limited to the advocacy or promotion of gun control."

5. Acknowledgment of Federal Funding

When issuing statements, press releases, requests for proposals, bid solicitations and other documents describing projects or programs funded in whole or in part with Federal money, all grantees receiving Federal funds included in this Act, including but not limited to State and local governments and recipients of Federal research grants, shall clearly state-

- (a) the percentage of the total costs of the program or project which will be financed with Federal money;
- (b) the dollar amount of Federal funds for the project or program; and
- (c) percentage and dollar amount of the total costs of the project or program that will be financed by non-governmental sources."

6. Restriction on Abortions

None of the funds appropriated in this Act, and none of the funds in any trust fund to which funds are appropriated in this Act, shall be expended for any abortion.

None of the funds appropriated in this Act, and none of the funds in any trust fund to which funds are appropriated in this Act, shall be expended for health benefits coverage that includes coverage of abortion.

- (a) The term "health benefits coverage" means the package of services covered by a managed care provider or organization pursuant to a contract or other arrangement."

Exceptions to Restriction on Abortions (Section 507)

The limitations established in this section shall not apply to an abortion-

- (a) if the pregnancy is the result of an act of rape or incest; or

SOUTHEAST HEALTHCARE

Area: Fiscal Administration
Subject: Federal Legislative Mandates Grant Funding Limitations

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SE Doc#:

- (b) in the case where a woman suffers from a physical disorder, physical injury, or physical illness, including a life-endangering physical condition caused by or arising from the pregnancy itself, that would, as certified by a physician, place the woman in danger of death unless an abortion is performed.

Nothing in this section shall be construed as prohibiting the expenditure by a State, locality, entity, or private person of State, local, or private funds (other than a State's or locality's contribution of Medicaid matching funds).

Nothing in this section shall be construed as restricting the ability of any managed care provider from offering abortion coverage or the ability of a State or locality to contract separately with such a provider for such coverage with State funds (other than a State's or locality's contribution of Medicaid matching funds).

None of the funds made available in this Act may be made available to a Federal agency or program, or to a State or local government, if such agency, program, or government subjects any institutional or individual health care entity to discrimination on the basis that the health care entity does not provide, pay for, provide coverage of, or refer for abortions.

- (a) In this subsection, the term "health care entity" includes an individual physician or other health care professional, a hospital, a provider-sponsored organization, a health maintenance organization, a health insurance plan, or any other kind of health care facility, organization, or plan."

7. Ban on Funding of Human Embryo Research

None of the funds made available in this Act may be used for-

- (b) the creation of a human embryo or embryos for research purposes; or
- (c) research in which a human embryo or embryos are destroyed, discarded, or knowingly subjected to risk of injury or death greater than that allowed for research on fetuses in utero under 45 CFR 46.204(b) and section 498(b) of the Public Health Service Act ([42 U.S.C. 289g\(b\)](#)).
- (d) For purposes of this section, the term "human embryo or embryos" includes any organism, not protected as a human subject under 45 CFR 46 as of the date of the enactment of this Act, that is derived by fertilization, parthenogenesis, cloning, or any other means from one or more human gametes or human diploid cell."

8. Limitation on Use of Funds for Promotion of Legalization of Controlled Substances

None of the funds made available in this Act may be used for any activity that promotes the legalization of any drug or other substance included in schedule I of the schedules of controlled substances established under section 202 of the Controlled Substances Act except for normal and recognized executive-congressional communications.

SOUTHEAST HEALTHCARE

Area: Fiscal Administration
Subject: Federal Legislative Mandates Grant Funding Limitations

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SE Doc#:

The limitation in this section shall not apply when there is significant medical evidence of a therapeutic advantage to the use of such drug or other substance or that federally sponsored clinical trials are being conducted to determine therapeutic advantage.

9. Restriction of Pornography on Computer Networks

None of the funds made available in this Act may be used to maintain or establish a computer network unless such network blocks the viewing, downloading, and exchanging of pornography.

(b) Nothing in this section shall limit the use of funds necessary for any Federal, State, tribal, or local law enforcement agency or any other entity carrying out criminal investigations, prosecution, or adjudication activities.

10. Restriction on the Purchase of Sterile Needles

No funds appropriated shall be used to purchase sterile needles or syringes for the hypodermic injection of any illegal drug: *Provided*, That such limitation does not apply to the use of funds for elements of a program other than making such purchases if the relevant State or local health department, in consultation with the Centers for Disease Control and Prevention, determines that the State or local jurisdiction, as applicable, is experiencing, or is at risk for, a significant increase in hepatitis infections or an HIV outbreak due to injection drug use, and such program is operating in accordance with State and local law.

RESPONSIBILITIES

Executive Leadership

FORMS

None Cited

Southeast, Inc.

Investment Funds

	FISCAL YEAR					CALENDAR YEAR		
	As of 09/30/2024	6/30/2024	As of 7/1/24	GAIN/(LOSS) 7/1/24 - 6/30/25	% of Gain/(Loss)	As of 1/1/24	GAIN/(LOSS) 1/1/24- 09/30/24	Percent
AMERICAN FUNDS								
AMCAP Fund - A	1,051,456	1,002,716	1,002,716	48,740	4.9%	884,890	166,566	18.8%
EUROPACIFIC GROWTH FUND	328,937	312,340	312,340	16,597	5.3%	291,856	37,081	12.7%
GROWTH FUND OF AMERICA	1,460,173	1,387,569	1,387,569	72,604	5.2%	1,188,001	272,172	22.9%
NEW WORLD FUND-A (Growth)	114,254	106,938	106,938	7,316	6.8%	100,169	14,085	14.1%
CAPITAL WORLD GROWTH & INCOME	835,371	790,522	790,522	44,849	5.7%	719,582	115,789	16.1%
FUNDAMENTAL INVESTORS	1,212,082	1,148,605	1,148,605	63,477	5.5%	1,001,388	210,695	21.0%
WASHINGTON MUTUAL INVESTORS FUND	1,469,537	1,374,693	1,374,693	94,844	6.9%	1,235,333	234,204	19.0%
CAPITAL INCOME BUILDER (Equity Income)	1,430,414	1,315,613	1,315,613	114,801	8.7%	1,260,051	170,363	13.5%
INCOME FUND OF AMERICA (Equity Income)	1,652,724	1,524,215	1,524,215	128,509	8.4%	1,461,658	191,067	13.1%
AMERICA HIGH INCOME TRUST (Bond)	880,940	837,951	837,951	42,989	5.1%	807,238	73,702	9.1%
INTERMEDIATE BOND FUND of AMERICA	803,951	770,252	770,252	33,699	0.0%	768,279	35,672	0.0%
CAPITAL WORLD BOND	760,361	711,262	711,262	49,099	6.9%	738,911	21,450	2.9%
TOTAL AMERICAN FUND INVESTMENTS	12,000,201	11,282,676	11,282,676	717,525	6.4%	10,457,355	1,542,846	14.8%
BANK FUNDS								
PREMIER MONEY MARKET/Scholarship Fd.	338,114	336,683	336,683	1,431	0.4%	291,621	46,493	15.9%
5/3 BANK - Money Market & Fixed Income	2,579,764	2,458,623	2,458,623	121,141	4.9%	2,461,974	117,790	4.8%
TOTAL BANK FUND INVESTMENTS	2,917,878	2,795,306	2,795,306	122,572	4.4%	2,753,595	164,283	6.0%
TOTAL SOUTHEAST INVESTMENTS	14,918,078	14,077,982	14,077,982	840,096	6.0%	13,210,949	1,707,129	12.9%