



CORNERSTONE
WHOLE HEALTHCARE ORGANIZATION, INC.



2021-2022
Annual
Report

Letter From Our CEO/President

I am happy to present to you Cornerstone Whole Healthcare Organization, Inc.'s (C-WHO's) first annual board report. C-WHO was founded in 2018 to help bridge the gap in healthcare needs for rural and marginalized populations. Additionally, we sought to change the dynamic of healthcare organizations, opting for a Matrix Model which allows C-WHO and its staff to be agile, innovative, and bold in the development and delivery of our work. This has afforded us a special place in the world of healthcare and health innovation. We have national experts asking to work with us on our projects, and when other healthcare organizations are experiencing workforce shortages, C-WHO has experienced an influx of individuals seeking us out to collaborate and join our innovative team. I believe this speaks volumes to the culture we have created to be collaborative, innovative, and a thought leader in the industry.

Over the past 4 years, C-WHO has grown exponentially. We now have over 50 staff and contractors, and an annual revenue of more than \$1.7 million. We expect to see this number double in the next year. We welcome new collaborative efforts and will be expanding our footprint nationwide over the course of the next 5 years with opportunities to expand internationally. This growth is exciting and comes with challenges which we have met head on. We are excited to see the growth that will continue to happen within C-WHO and across our partnering organizations. This next year will see the addition of direct services to patients as well as an expansion in contracts and grants.

Please enjoy this board report, which highlights our organizational efforts over this past year. The C-WHO team would like to thank our partners and stakeholders for an amazing four years. We would not be where we are without you.

Sincerely,



A handwritten signature in blue ink that reads "Jennifer Yturriondobeitia".

Jennifer Yturriondobeitia, MSW, DBH

Chief Executive Officer/President

About Us

Cornerstone Whole Healthcare Organization, Inc. (C-WHO) is a 501(c)(3) private non-profit, serving rural and other vulnerable populations, dedicated to improving the conditions for health among all communities. Our diverse team of thought leaders, content experts, project managers, data scientists, clinicians, and information technology specialists offer an array of services to help your organization not just survive but thrive in the ever-changing health and healthcare space.

Our Mission

We forge partnerships in pursuit of health equity to identify and optimize opportunities that improve outcomes and create sustainable systems.

Our Vision

To be a force that inspires and creates radically innovative solutions across the health continuum.



In Pursuit of Health Equity.

We strive to inspire and create
radically innovative solutions
across the health continuum.

Data Management and Analysis

Our data scientists work with you to understand, manage, and own your data and accomplish your goals.

Continuous Quality Improvement

We work with your organization to create improvement cycles across your different focus areas to give you the tools to take the next steps toward your goals.

Proposal Development & Management

We identify proposals that match your organization's needs and work with you to develop workplans, budgets, and submission content that are truly appropriate for your team.

Provider Network Management

Our team has expertise in managing behavioral health providers and pharmacy providers as part of our integrated and inclusive approach to supporting healthcare communities.

Clinical Technical Assistance

We work with clinics, hospitals, and other healthcare organizations to identify your goals for improvement and connect teams with the tools tailored to needs, size, ability, and culture.

Training Center

We facilitate individual trainings and develop training networks to meet the needs of communities. Trainers are selected based on expertise and fit with the target population

Research Project Management

We have worked across various study projects from qualitative text analysis to large scale biometric collection and analysis.

Virtual Conferences

We will work with your organization to plan sessions, enable virtual speaking and training events, and provide continuing education credits to professionals.

Resource Hub

C-WHO understands the importance of knowing what services and supports are available across multiple areas. As a result, we have developed various structures to deliver crucial content.



Key Projects

I-ROPES



The Idaho Rural Opioid Prevention and Pharmacy Education Stewardship Project, with funding from HRSA, is creating better systems of care for individuals with OUD by linking community resources.



rEASON



The Rural Emergent Alternative Surgical Opioid Non-Use project, with funding from HRSA, is providing opioid sparing analgesia guidelines to health care providers and patients to mitigate surgically-gated OUD.

D-DIRCS



The Durable Data Idaho Resource Center Services project, with funding from PacificSource, is implementing novel data management technical assistance to small practices so they can own their own data and can use it in a meaningful way.



GRITTE



The Greater Rural Idaho Telehealth Team Expansion project expands access to critical behavioral health services and treatment resources in rural under-served communities across Idaho.

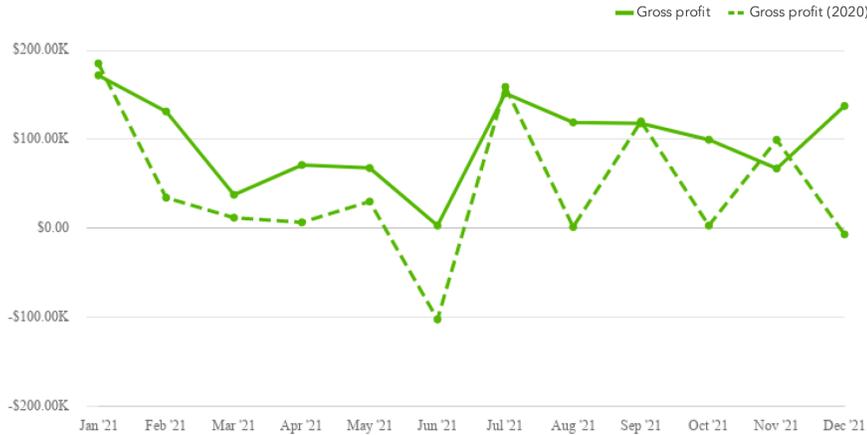
Financials

Cornerstone Whole Healthcare Organization INC

GROSS PROFIT BY TIME
Last fiscal year

\$1,176,521.43

Total gross profit



2021 Revenue

C-WHO continued to grow in 2021. We continue to increase our contracts and grants to keep up with this growth as reflected in our 2021 revenue. We anticipate continued growth this next year due to new contracts and business line development.

\$1,176,521.43

2021 Expenditures

While our financial growth has been consistent, we maintain spending below our total revenue. This keeps the organization lean and able to maintain its current growth pace while being fiscally sound.

\$1,145,095.00

Cornerstone Whole Healthcare Organization INC

EXPENSES BY TIME
Last fiscal year

\$1,145,095.00

Total expenses

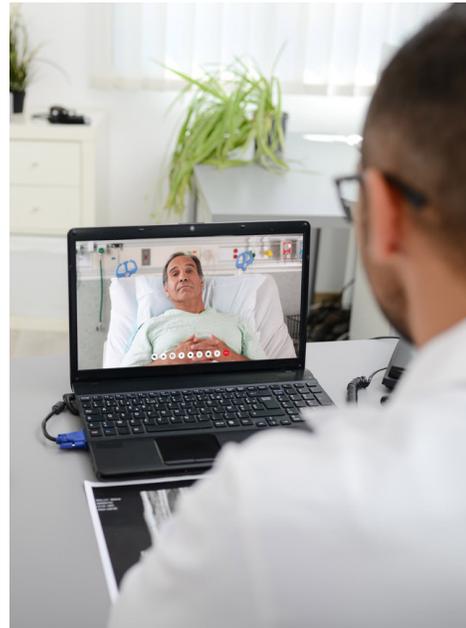


System of Care Services and Strategies



This last year has brought many changes to our Division. First, we experienced a name change to the System of Care Services and Strategies Division. This name change represents a merging of two prior divisions (Clinical Innovation and Advancement as well as the Community-Based Health Equity & Innovation Division). The Division houses two programs: the Behavioral Health Clinical Innovation and Advancement Program and the Community-Based Equity & Innovation Program.

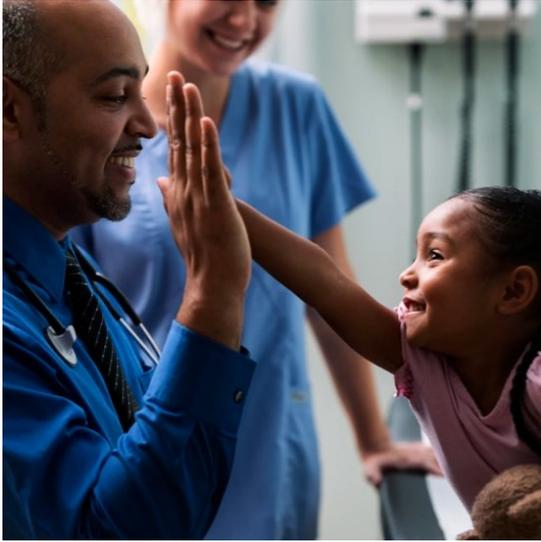
In addition to the many projects, grants, and contracts we are working on the SOCSS Division has been working toward direct service delivery. In years past, our clinical staff have acted as subject matter experts and provided technical assistance to organizations supporting them as they develop behavioral health programs. While we continue with these services, we are also working on building out our own behavioral health delivery system. Our team is set to begin delivering same day access tele-behavioral health services in October 2022 with plans to be fully credentialed through public and private payers by January 2023.



Chief Administrative Officer & Interim COO
of System of Care Services and Strategies

Denise Jensen, LMSW

Public Health & Grants Management



The Division of Public Health and Grants Management supports emerging projects in the intersection of community health and healthcare and the general grant administration processes within C-WHO. Key functions include exploring new partnerships with local public health, state public health, non-clinical services, and healthcare providers. Two examples of this work are:

- *Pride in Idaho Care Neighborhoods*: The project developed best practice guidelines for rural providers and care teams related to LGBTQ+ health services. These practices are now being implemented in healthcare clinics.
- *Healthy Minds Partnership*: Supports expanded access to behavioral health services in rural Idaho schools through public-private partnership.

The Grants Management team reviews proposals and grants activities against organizational resources and policies and procedures. The team recently added a Compliance Specialist to support the Grant Management functions and intersection with financial policies.



Chief Operation Officer of Public Health & Grants Management

Rachel Blanton, MHA

Business Intelligence & Research

Over the past year, the Business Intelligence and Research team has expanded from 3 team members to 7 team members to address the needs of C-WHO and our partners. One of our key projects with PacificSource has expanded from 8 to 16 clinics who are receiving technical support, data support, and clinical support (across all divisions). The team provides data collection, aggregation, validation, dashboard development and visualization, and reporting services to more than 20 clinics and critical access hospitals as part of several grant efforts. We work and operate cross-functionally in all divisions and specifically with the Technology and Strategy team related to data security, interoperability, API builds, Azure administration, data transfer and storage options. We also support Electronic Health record expertise across the many different platforms we interact with (Epic, Epic-OCHIN, Cerner, Meditech, Practice Partner, eCW, NextGen, Thrive, Health Land, Athena, etc.).



We have developed several lines of business related to our combined expertise that includes EHR implementation support, Data Warehouse Development and Quality Measure reporting to state federal and local stakeholders. Additionally, we are excited to announce our submission of a paper for publication to Stat (a statistical journal) related to the PacificSource DDIRCS project. Finally, we are co-presenting at two concurrent sessions during CFHA about our innovative work. The Business Intelligence and Research Division is integral to all facets of C-WHO's work.



Chief Operation Officer of
Business Intelligence & Research

Jenn Rolfes, DBH, MBA, MS (Statistics)

Strategy & Technology

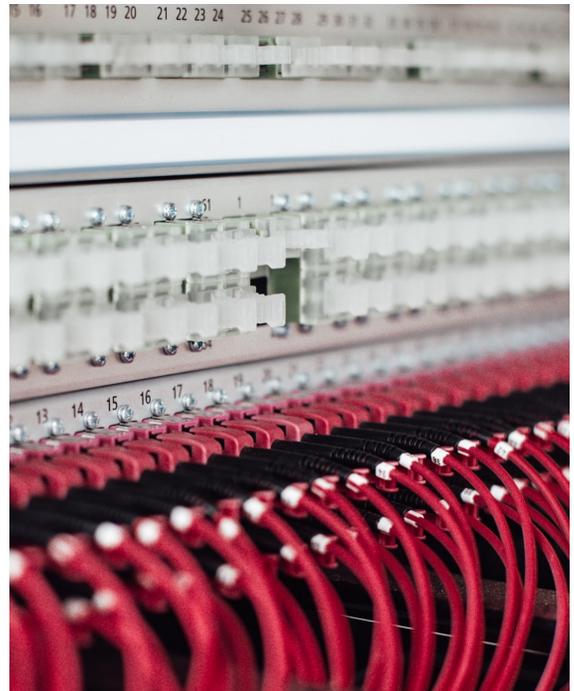


In additions to the projects listed in the Data and Research Team which this division supports we have been focusing on the below in the past year:

1. Continuing to work on the contract with Heritage Health to guide them on the Data Warehouse (ETL) project
2. IT continues to provide c-who laptops and equipment as we get funds to help cover the expense
3. We have hired an EPIC Specialist that is assisting with the Pacific Source Data project
4. We have started the process of organizing policy and procedure and folder/ document management
5. We are working on a new project management tool (building ourselves using MS) to replace Mavenlink

Future:

- Potentially Hiring for these positions:
 - InfoSec Manager and
 - EHR support member
 - Project Manager (interns or Jr.)
- Close Valor Health Request for Proposal Project by end of the year



Chief Operation Officer of
Strategy & Technology

Jennifer Clark, MS

Pharmacy & Primary Care



Ongoing Grant Coordination and Support Efforts

- GRITTE
- I-ROPPEs
- rEASON
- CHE (Bingham Health)
- PPHIRE
- DDIRCS

Evolution of grant-based pharmacy consortiums to formalized Advanced Services Pharmacy Network (ASPN) - Kick-Off meeting held 7/22/22

Representation present from throughout Idaho

- Specialty Pharmacy
- Integrated Clinical Pharmacists
- Community Pharmacy
- Nuclear Pharmacy
- Urban and Critical Access Hospitals
- Health Plans
- Health System Pharmacy Administration
- College of Pharmacy



Chief Operation Officer of
Pharmacy & Primary Care

Tyler Hemsley, PharmD

Marketing & Communications



This year The Marketing and Communications team grew to three team members. The team has been supporting almost every C-WHO project in one way or another. We assist with workflow development, creation of marketing flyers, posters, brochures, press releases, social media posts, targeted email campaigns, landing page development, website designs, learning management development, and conference planning.

The main area of growth, this year, was implementing a marketing platform to increase our efficiency and broaden our communication abilities for C-WHO and our clients. We have utilized this tool to build out a robust learning management system for C-WHO and other clients, created automatic targeted email campaigns and newsletter distributions, assisted with the launch of the newly created C-WHO podcast, implemented landing pages, community boards, and specific offers for a variety of trainings, consortiums, networks, and conferences. This year we have also fine tuned our social media strategy and increased our presence dramatically.



Chief Operation Officer of
Marketing & Communications

Linda Cardwell

Business Development



In a strategic effort to build out the infrastructure needed to keep up with the growth of C-WHO, we introduced the business development department whose vision and mission is to provide ancillary income to support the operations of C-WHO and create additional unrestricted capital.

We have over the last few months tested, started, and refined several ancillary business streams; others will be rolled out as resources and timing align. Some of the subsidiaries will partially owned alongside vested partners while others will be wholly owned subsidiaries. We are in the process of implementing a clinic & training institute, a medical spa/OTC supplies, and a real estate investment+ business. Each of these subsidiaries will, as they develop, provide additional operating and unrestricted income which will further C-WHO's mission and vision.



Chief Operation Officer of
Business Development

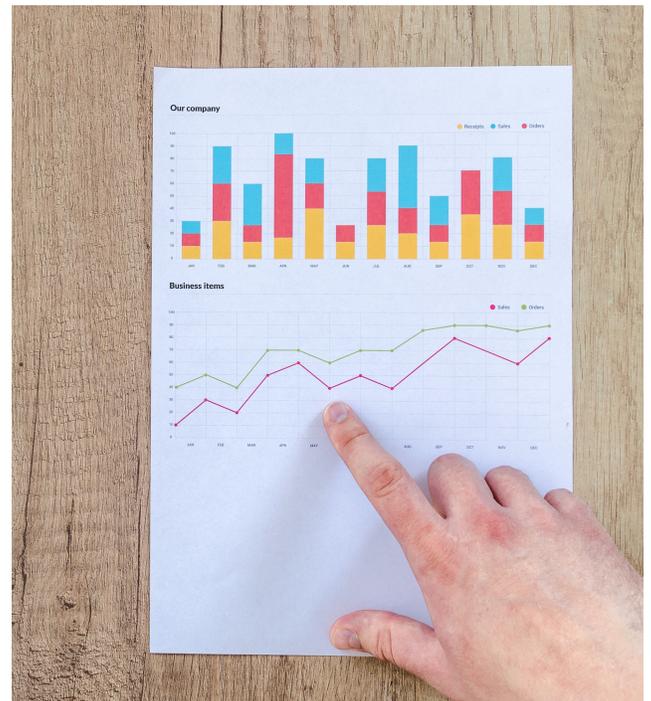
Jeremy Johnson

Finance



C-WHO has shown a path of steady growth from inception and has not ceased this growth in 2022. We have seen both expenses and Revenue grow as we are expanding both services and contracts. We are also expanding our operational division which includes human resources, finance, and business development, in an effort to meet targets and scale according to our growth.

We have also reached the point in our growth where we are working with KDP, an advisory and auditing group who is working with us to streamline our financial processes, accounts, and upscale our software. In addition to this, and with great excitement, we will also perform a financial audit for the 2022 fiscal year. This will allow us to show our progress as well as be able to apply for additional grants and funding that were unavailable to us previously.



Chief Operation Officer
of Finance Management

Ross Novick, JD

Board of Directors



Jason Haugen
CHAIRMAN OF THE BOARD



Jen Yturriondobeitia, MSW, DBH
PRESIDENT & CHIEF EXECUTIVE OFFICER



Sandra Shelton
BOARD MEMBER



Dhuha L. Ali, MD
BOARD MEMBER



Palina Lauangketh, DSL, MHS, RHIT
BOARD MEMBER



Suzanne McKinney, MS
MEMBER AT LARGE



Keith Davis, MD
RURAL HEALTH CARE DIRECTOR



Jen Clark, MS
Secretary

Future Goals

Develop integrated local systems to include previously uncoordinated providers (specialty, hospital, pharmacy, primary care), develop care transition and care coordination protocols

Develop a new integrated pharmacy network, promote the development of state integrated behavioral health networks in one new state per year, train a minimum of 5,000 unique providers per year

Implement a local and independent tele-behavioral service line to offer preventative care, integrated care, and traditional therapy, train new integrated health clinicians

Develop fully integrated monitoring systems for independent and rural providers, facilitate data improvement projects and support maintenance services in over 50 clinics per year

Create a data vault to allow practices and systems to truly own their data, implement an AI learning experience for free text records, support clinics and hospitals in EHR conversions

Develop proposals for a minimum of \$10 million per year in rural and underserved areas, develop a nonprofit healthcare marketing and communications center for excellence, co-develop over \$20 million of funding with partner services (law enforcement, public health, education)

