



CORNERSTONE

WHOLE HEALTHCARE ORGANIZATION, INC.



2022 Annual Report

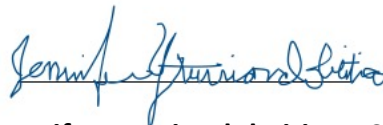
Letter From Our CEO/President

2022 was an amazing year for Cornerstone Whole Healthcare Organization, Inc. (C-WHO). In the four years since its inception, C-WHO has grown in leaps and bounds. As with all new organizations, C-WHO has had to navigate the growing pains of a young company in an ever-growing industry, and we've done so while keeping our mission, vision, values, and culture intact (not an easy feat). Organizationally, and within each division, we've developed a more solid foundation from which we are better able to manage organizational growth. This has meant developing divisional charters, missions, visions, and staffing plans, as well as creating an organizational administrative structure to conduct some of the enterprise-wide business of the organization.

While we are becoming clearer in the work that C-WHO, and each of its divisions conducts, we have not lost our original intent of health equity and radical innovation. As an organization, we strive to create a work environment where our staff are encouraged to grow and thrive, and that our partners trust they are receiving the highest level of expertise and professionalism, while still being the agile and task-oriented organization we've become known for. C-WHO's name has gotten out and our partners are endorsing our work across the country. I believe, this is due to our focused eye on maintaining our mission, vision, values, and culture that has allowed us to grow so rapidly and with such success.

I invite you to read through our annual report and discover more about what C-WHO was up to in 2022. Get to know our divisions and the leaders we've brought into the organization to ensure its success. 2022 was a foundational year that set us up for the growth we are already seeing in 2023. I would like to thank my leadership team and all our staff at C-WHO for the tireless effort they put in every day. As an organization based in teamwork, I believe that not any one of us alone could have made C-WHO the success that it is, it takes our entire team, and I am grateful to lead them in this endeavor.

Sincerely,



Jennifer Yturriondobeitia, MSW, DBH

Chief Executive Officer/President

About Us

In Pursuit of Health Equity.
We strive to inspire and create
radically innovative solutions
across the health continuum.



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.

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 Services

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 Integration & 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. We provide healthcare/practice transformation, team-based care, and clinical integration for primary care, behavioral health, and pharmacy.

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.



New Key Projects



Idaho School Outreach Services project is funded by Idaho Department of Health and Welfare to improve mental health among youth living in Camas and Lincoln Counties by utilizing evidence-based practices in suicide prevention, mental health resiliency training, and supported access to care.



Advanced Services Pharmacy Network brings together key thought leaders and representatives from across the pharmacy landscape to align efforts around strategic projects and initiatives for advanced pharmacy services. Currently focused in Idaho, there have been recent developments to extend our partnerships to other states in the Pacific and Mountain Northwest.



C-WHO is assisting Central Oregon Behavioral Health Consortium in building an enduring structure to serve as a capacity building platform for the systematic integration of behavioral health into rural primary care clinics and practices.



Pride in Idaho Care Neighborhood is a multi-funder project focused on enhancing access to LGBTQ+ affirming care in rural healthcare communities across Idaho who may face inequity, discrimination, or systemic barriers to whole health and wellness.



C-WHO is supporting Northeast Oregon Network with their Wellness at Work project that supports the health care workforce throughout Oregon by providing training to frontline staff working with rural or culturally underserved populations.

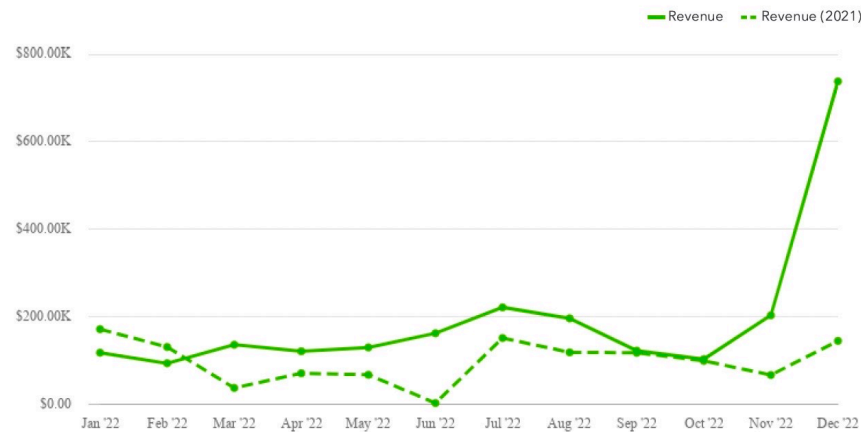
Financials

Cornerstone Whole Healthcare Organization INC

2022 REVENUE
Last fiscal year

\$2,349,805.78

Total revenue



2022 Revenue

C-WHO continues to track on a growth trend financially. Our ending revenues compared to 2021 are significantly higher indicating our growth and incoming funding awards through grants and contracts.

\$2,349,805.78

2022 Expenditures

Expenses increased in 2022 compared to 2021. This was anticipated due to moving from a contractor only to an employed model which has increased spending.

\$2,512,955.75

Cornerstone Whole Healthcare Organization INC

2022 EXPENSES
Last fiscal year

\$2,512,955.75

Total expenses



Corporate Administration



The Administration team provides enterprise level administrative support to the organization.

Vision: The pursuit of empowering innovation and creating a sustainable infrastructure for the future of C-WHO.

Mission: To provide foundational infrastructure which allows the organization to be agile, mobilize resources, and innovate new ideas.

The Administration team's 2022 Highlights:

- Established an HR department including policies and procedures and onboarded 18 employees.
- Established credentialing department and obtained contracts with public and commercial payers for both behavioral health and physical health.
- Received funding to provide MSO Executive Director services to IBADCC, Idaho's substance use disorder counselor certification board.



Chief Administrative Officer

Denise Jensen, LMSW

Behavioral Health Innovation & Community Advancement



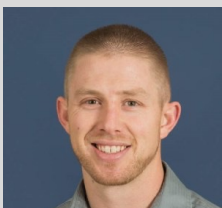
The Behavioral Health Innovation & Community Advancement team develops and implements innovative, scalable, and financially viable solutions for Behavioral Health while advancing partnerships within the communities we serve.

Vision: Transform care delivery systems to bring essential and innovative solutions for whole person care across the healthcare continuum.

Mission: Inspire behavioral health and community equity through innovative solutions while advancing community partnerships and initiatives.

Behavioral Health Innovation and Community Advancement 2022 Highlights:

- Go live with virtual brief services-increasing referral rate week by week.
- Go live with IHNC Integrated Behavioral Health.
- New COO-Allows for more focused work for the division and Denise able to jump fully into CAO duties.
- IDOC grant funding to expand services-Short term project focused on BH support to IDOC staff



Chief Operating Officer Behavioral Health
Innovation & Community Advancement

Jacob Wilson, LCSW

Public Health & Grants Management



Our Public Health division supports emerging partnerships in the intersection of community and clinical initiatives designed to improve access to health and health status.

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

Mission: We forge partnerships in pursuit of health equity to identify & optimize opportunities that improve outcomes and create sustainable systems. The team's 2022 highlights:

- 3 national publications/presentations for LGBTQ+ healthcare services
- Added four new team members with backgrounds in public health
- Expansion into maternal child health programs

The Grants Management team at C-WHO utilizes grant funding to catalyze services and supports for underserved communities of care. Grants are a tool to develop sustainable resources for the organization and its partners.

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

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

The team's 2022 highlights:

- 5 new community supported organizations through grant writing with over \$500,000 awarded in funding
- Invitation to submit NIH community grant



Chief Operation Officer of Public Health & Grants Management

Rachel Blanton, MHA

Healthcare & Pharmacy Innovation



Our Healthcare and Pharmacy Innovation team develops innovative, scalable and financially sustainable solutions for Healthcare and Pharmacy in the healthcare neighborhood.

Vision: To support and sustain C-WHO's vision, aligning Healthcare and Pharmacy solutions across the healthcare continuum.

Mission: To develop and grow viable networks and care delivery models aligned with value-based contracting and population health.

The Healthcare and Pharmacy team's 2022 Highlights:

- Multiple avenues for recurring revenue have been presented and reviewed and planning is underway
- All current grant and contract deliverables are being met. New statements of work have been proposed with multiple partners and alignment with PacificSource contract has been solidified.
- The Advanced Services Pharmacy Network Advisory Panel has been formalized. Outreach and enrollment of new network partners continues. Key relationships have been established or advanced with payers, independent pharmacies, clinically integrated networks, and the ISU College of Pharmacy.



Chief Operation Officer of
Healthcare & Pharmacy Innovation

Tyler Hemsley, PharmD

Business Intelligence & Research

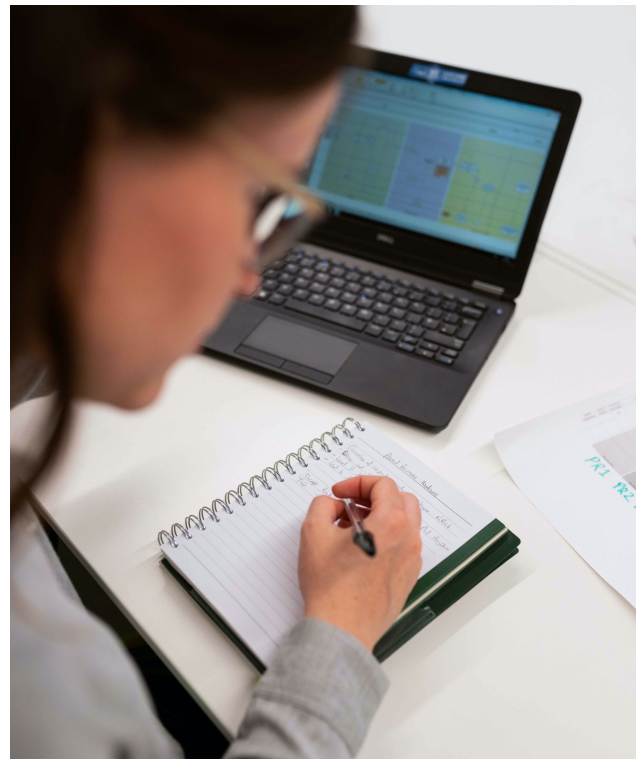


The Business Intelligence & Research team support healthcare organizations in designing innovative solutions through data extraction, validation, analysis and storytelling, to minimize burden on care teams and improve patient outcomes.

Mission & Vision: To design and support data solutions with our partners and clients that allow for scalable pursuit of the Quintuple Aim, both for our organization, our clients, and our industry.

The Business Intelligence & Research team's 2022 highlights:

- With support from several divisions, applied for an NIH grant - a 10-year \$12 million award that we were invited to apply for to improve health equity for the LGBTQ+ population
- Secured two additional multi-year contracts for \$380,000 total with Oregon Washington Health Network
- Kicked off the multi-year PacificSource expansion project focused on patient experience, data integration, risk adjustment, clinical workflows and pharmacy optimization
- Supported the development of 3 SAMSHA grants, 2 HRSA grants and a foundation grant
- Grant support for 13 federal grants (evaluation, data extraction, reporting, analytics); 3 grants internal to C-WHO and 10 are with seven partner organizations



Chief Operation Officer of
Business Intelligence & Research

Jenn Rolfes, DBH, MBA, MS (Statistics)

Strategy & Technology



Our Strategic team formalizes and supports execution of C-Who's strategic initiatives, partnering with internal and external stakeholders.

Vision: Ensure a focus on sustainability & innovation across C-Who's team.

Mission: Build mechanism and governance structure to drive rigor and accountability for execution of strategic initiatives, ensuring alignment across the organization.

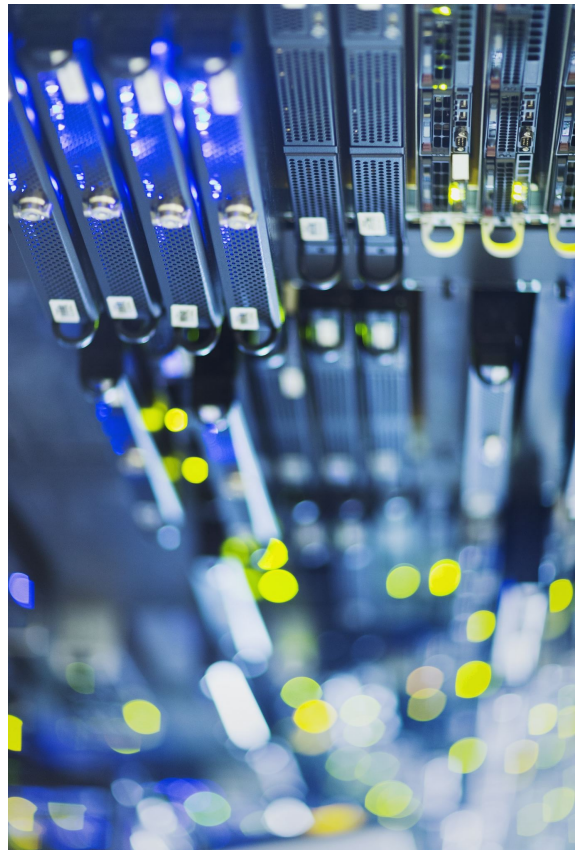
The Technology team supports all technology platforms internal and external partners at c-who.

Vision: To support and sustain innovative solutions across our customers.

Mission: To build new revenue streams for c-who while supporting and optimizing technology and create sustainable systems in and out of c-who.

Our Strategy and Technology team's 2022 highlights:

- Successfully completed the Heritage Health ETL Project (under budget)
- Opened c-who's first Health Neighborhood Center in Idaho
- Conducted 1st quarterly strategic session with ELT and divisional CO
- Started internal belief audit with staff
- Started documentation of SOP for EPMO Standard Operating Procedure and Guidelines & Practice Implementation Playbook



Chief Operation Officer of
Strategy & Technology

Jennifer Clark, MS

Marketing & Communications



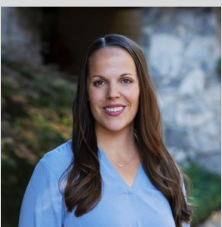
The Marketing and Communications team supports the internal and external strategies and projects at C-WHO through marketing and communication efforts that reflect C-WHO's brand, goals, values, and mission.

Vision: For C-WHO to be well-recognized as an innovative leader in equitable and sustainable healthcare.

Mission: Strengthen the C-WHO brand through consistent communications in a diverse array of marketing channels.

The Marketing & Communications team 2022 highlights:

- We implemented a marketing platform to increase our efficiency and broaden our communication abilities for C-WHO and our clients
- We have built out a robust learning management system for C-WHO and other clients, created automatic targeted email campaigns and newsletter distributions
- We produced, launched, and promoted a bi-weekly C-WHO podcast
- Implemented landing pages, community boards, and specific offers for a variety of trainings, consortiums, networks, and conferences
- We have increased our social media following and engagement exponentially



Chief Operation Officer of
Marketing & Communications

Linda Cardwell

Finance



The Finance team's purpose is to keep C-WHO financially compliant and viable.

Vision: Ensure GAAP compliance, organizational sustainability, provide growth strategies and support for leadership and support departments with financial management needs.

Mission: To build, sustain, and forecast in an efficient, compliant, and scalable manner.

The Finance team's 2022 highlights:

- Finance Dept became certified in Grant Cost Allocation for developing indirect cost plans
- Ross became certified in the Harvard Business School CORE curriculum for Business Analytics Economics for Managers and Financial Accounting.
- Completed a soft audit for fiscal year 2021.
- Implemented and updated GAAP accounting processes and procedures, internal controls and close out checklists.
- Implemented payroll for the C-WHO employee model.



Chief Operation Officer
of Finance Management

Ross Novick, JD

Board of Directors



Jason Haugen
BOARD CHAIR & TREASURER



Jennifer Yturiondobeitia, MSW, DBH
PRESIDENT & CHIEF EXECUTIVE OFFICER



Sandra Shelton
BOARD MEMBER



Dhuha L. Ali, MD
BOARD MEMBER



Palina Louangketh, DSL, MHS, RHIT
BOARD MEMBER



Laura Clark, MBA
BOARD MEMBER



Suzanne McKinney, MS
MEMBER AT LARGE



Keith Davis, MD
RURAL HEALTHCARE DIRECTOR

Looking to the Future

Develop integrated local systems which include training centers for international medical graduates and others to deliver health and behavioral health care in a team-based, holistic approach

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 consultation, 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)

