



# Changing Lives. Strengthening Communities.

2022-2023 ANNUAL REPORT

**COPA**  
HEALTH



**We inspire health,  
hope, and happiness  
by delivering  
world-class solutions  
to individuals, families,  
and communities.**

# Letter from our Board Chair and CEO

We are pleased to present Copa Health’s 2023 annual report. It is presented to you with gratitude.

This is the first annual report from Copa Health, and it includes information from all our service lines. Along with a new name, we chose a strong purpose statement to set the path for the organization to move forward.

Our strategic plan led us to strengthen our infrastructure in technology, streamlining critical processes organization-wide, and moved us toward a people-first platform in terms of our workforce. Along with providing a structure to ensure upward advancement for staff members, hourly wages have increased approximately 18% on average since FY20.

It also led us to grow in terms of the number of vulnerable individuals we are privileged to serve. We are very proud that we increased our housing programs to include youth and to provide safe and well-appointed assisted living for those in their senior years. We also have additional projects that will come to completion in the next year that will provide low-income housing, transitional residential for adults, and a youth residential facility in Mesa. All are designed to decrease the cost of care, remove gaps in care and reduce homelessness while promoting recovery.

Our geographical footprint of care expanded over the last year to include an integrated clinic, in-home services and employment services in Lakeside, AZ. Another integrated clinic and a youth residential facility opened this summer in Utah.

Finally, Copa Health promoted the formation of a behavioral health Accountable Care Organization, and it was joined by several outstanding partner behavioral health organizations in Maricopa County. Supported by AHCCCS and health plans, it will better serve complex needs members with coordination of treatment.

Of course, we could not do this without our exceptional support staff and providers that come to work each day, living our values and ready to make a difference for those we serve. We are humbly thankful to those that support us financially so that we can make this happen.

We are proud of our accomplishments over the past year and are excited about what the future holds for Copa Health. We look forward to another year of providing compassionate, world-class service in our communities.

Yours in servant leadership,



David M. Day, Board Chair  
Hindsight Financial Forensics, PLLC



Dr. Shar Najafi-Piper  
Copa, Chief Executive Officer

# Board of Directors



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Shar Najafi-Piper, PhD,  
Copa Health

# Executive Leadership Team



Dr. Shar Najafi-Piper  
Chief Executive Officer



Dr. Darwyn Chern  
Chief Medical Officer



Martin Quintana  
Chief Financial Officer



Stacy Garner  
Chief of Staff



Latrice Hickman  
Chief Risk & Compliance Officer



Dr. Diana Medina  
Chief of Clinical Education



Dan Hixon  
Chief Information &  
Digital Officer



Rita Martinez  
Chief People First Officer



Maria Cristina Fuentes  
Chief of External Affairs



Janey Durham, VP  
Employment Related Services  
& Day Programs



Dr. Wendy Bunn, VP  
Housing and  
Community Support Services



Michaela Statt, VP  
Integrated Health Solutions



Norm Duve, VP  
Community Relations



Jenn Barrett, VP  
Revenue Optimization

# Our Values & Strategic Goals



Strategic Goals:

- Support the Health of Our Members and Staff
- Seek Precision
- Lead the Way in Innovation



Purpose Statement:

We inspire health, hope, and happiness by delivering world-class solutions to individuals, families and communities.

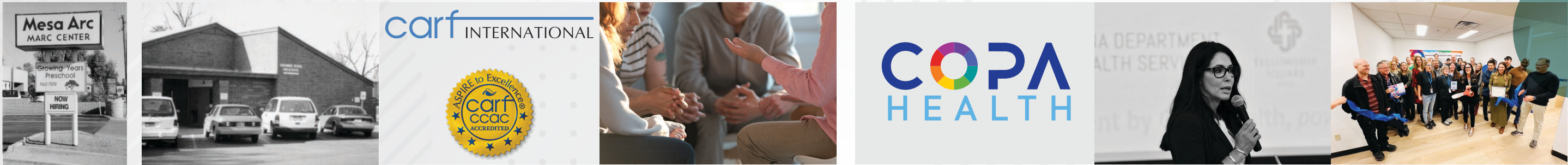
# History of Copa Health

In 1957, nine families came together to form an organization to support those with special needs. Through the years, our services have expanded to include intellectual and developmental disabilities, mental health, housing, veterans’ services, elder care, family support, integrated primary care, case management, and psychiatric care for individuals in Arizona and Utah.

See key milestones below:

Our purpose is to inspire hope, health and happiness by delivering world-class solutions to individuals, families and communities. Our core values: people first, compassion, innovation, perseverance, accountability, and integrity. These values guide our actions.

— Dr. Shar Najafi-Piper , COPA Chief Executive Officer



## 1950-1960s

**1957:** **Mesa ARC** is formed and partnered with **Mesa Public Schools** to provide special classroom instruction for those with mental and physical disabilities.

## 1970s

**1973 MARC** restructures to become **Marc Center for the Developmentally Disabled** offering vocational programs for adults; home and community-based services; and advocacy for people with developmental disabilities.

## 1980s

**Arizona expansion:** formal accreditation by the **Commission on Accreditation of Rehabilitation Facilities (CARF)**; vocational programs in Apache Junction, expanded preschool/childcare services; **15 group homes** housing adults with developmental disabilities; and adult day services.

## 1990s

**Behavioral Health:** **Marc Center’s Community Living Services** program serves individuals at **23** settings and merges with **Marc Behavioral Health Services**, expanding services offered to include behavioral health.

## 2000s

The 2000s saw the greatest growth in Copa Health history with the establishment of two **Villages programs**, community support services, behavioral health service expansion, community living and vocational training.

Copa acquires 5 outpatients clinics.

## 2010s

Continued expansion of residential, community and employment services.

Community Support Services expands into **Navajo and Apache County**.

**Integrated care** is launched at two clinics.

**Shar Najafi-Piper, PhD** becomes the **CEO** to lead the organization.

## 2020-2022

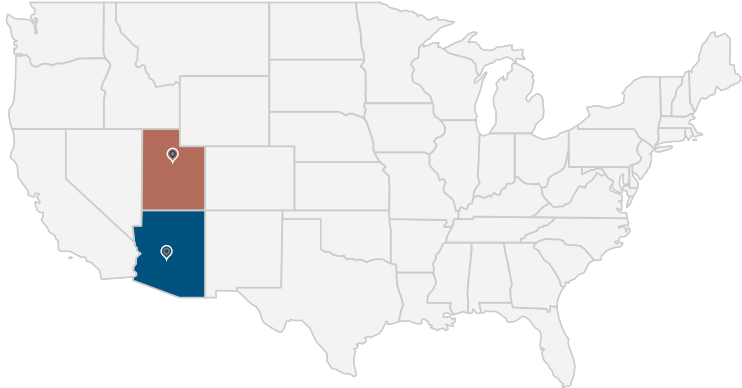
Copa implements telehealth and includes mobile gyms to amplify the ability to serve during the pandemic.

Two ACOs are implemented to strengthen service delivery and treatment to complex care populations in central and southern AZ.

An integrated clinic, housing, and employment related services are added in Lakeside, AZ.

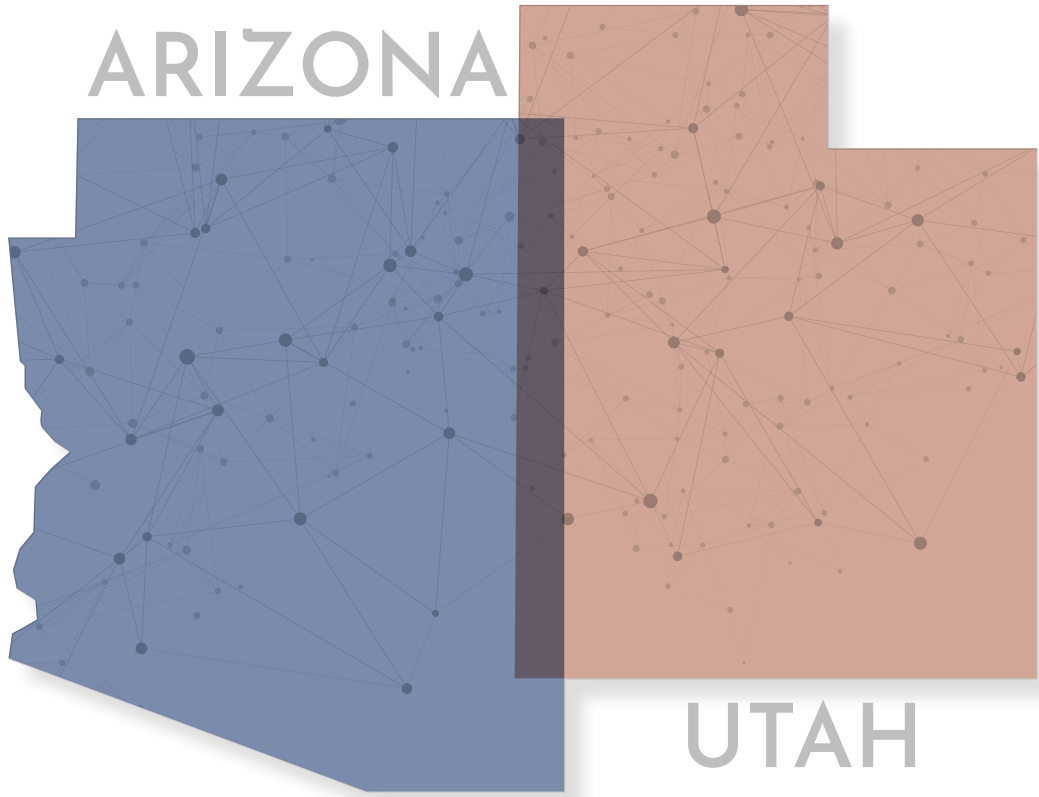
The organization expands into Utah with an integrated clinic and a behavioral health youth residential facility in the Salt Lake City area.

# Overview of Programs



National Footprint

ARIZONA



UTAH



251

Supportive Housing



27

Employment Related Services Sites



150+

Supported Employment Sites



10

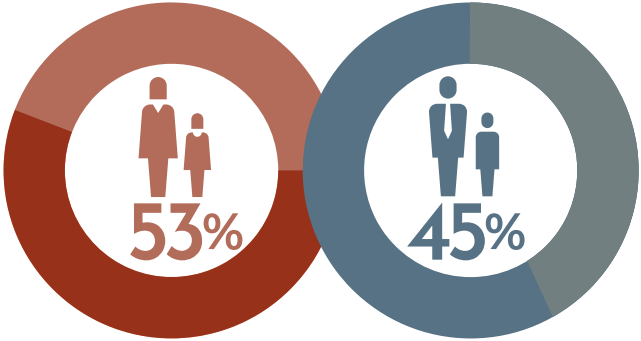
Integrated Outpatient Clinics

# Number of People Served



10,485 FY2022

Total People Served\*



9,332

Integrated Health Solutions



3,010

Employment Related Services & Day Programs



824

Residential & Community Support Services

## COPA Programs

- Integrated Health Solutions
- Housing & Community Support Services
- Employment Related Services & Day Programs

\*Some members participate in more than one of Copa Health Programs.

# Integrated Health Solutions



## Integrated Outpatient Clinics

In FY22 Copa Health served over 10,000 individuals through our integrated outpatient health clinics in Arizona, an overall growth rate of 15% making Copa Health the largest integrated clinic operator for individuals with serious mental illness in Maricopa County.

Using evidence-based interventions, Copa provides effective, integrated health care services through 10 outpatient healthcare clinics throughout Arizona and Utah. The Copa Health model delivers outstanding patient outcomes. In FY22, Copa achieved 100% of the member outcome metrics in its value-based contracts and Arizona’s Targeted Investment Program (TIP) and benefited taxpayers by reducing unnecessary patient medical spending by \$8.5 million.

As a participant in the AHCCCS Targeted Investment Program (TIP) Copa Health is one of the few providers to meet all the targets of the program over the six years of the initiative. In addition, Copa Health scores have consistently outperformed comparable agencies in meeting the goals set in the TIP program.

Given the unique challenges our members face, Copa provides both comprehensive mental health services and primary care physical healthcare, including health and wellness programs, addressing both mind and body with convenient service options that include face-to-face, telehealth or telephonic services depending on the individual’s preference.



## Evidence-Based Services

Evidence-Based Counseling services are available at clinics for all members. Copa Health has a cadre of 30 licensed behavioral health professionals who conduct both individual and group therapy. Copa provides ongoing training for therapists in several evidence-based techniques. These include:

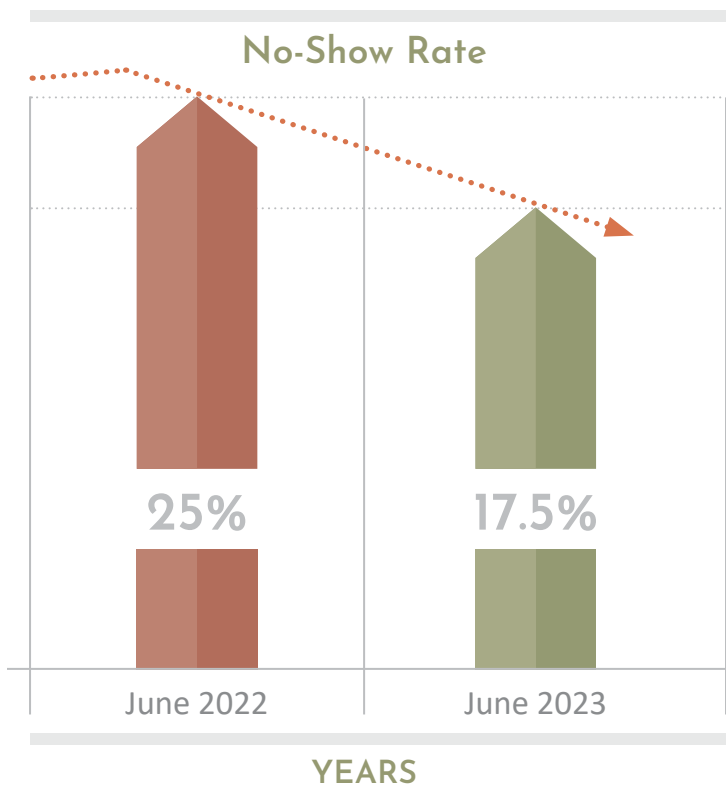
- Cognitive Behavioral Therapy (CBT), which is used for many diagnoses and needs (depression, anxiety, grief, social issues, problem solving) and is the foundation for general counseling. The duration of CBT is driven by the goals of the participant and should have a clearly defined discharge plan.
- Integrated Dual Disorders Treatment (IDDT) is specifically for people with dual diagnoses, meaning substance use and mental health diagnoses.
- Solution Focused Brief Therapy (SFBT) is for those who want to find solutions to a specific issue or concern. Treatment is for individuals with depression, anxiety, social, or other behavioral issues.
- Dialectical Behavioral Therapy (DBT) is used to treat borderline personality disorder. Treatment consists of group skills training and individual therapy. This is a long-term therapy and requires a time commitment to complete treatment.
- Eye Movement Desensitization and Reprocessing (EMDR) is used to specifically treat trauma/ posttraumatic stress disorder (PTSD). The duration is driven by the goals of the participant and have a clearly defined discharge plan.
- Acceptance and Commitment Therapy is an empirically based psychological intervention that uses acceptance and mindfulness strategies along with commitment and behavior-change strategies to increase psychological flexibility.
- Cognitive Enhancement Therapy (CET) helps to enhance mental capacities that produce awareness and meaningful social interactions. It is for people diagnosed with Schizophrenia, and related cognitive disorders (schizo affective and autism spectrum).

In addition, Copa Health provides a variety of other evidence-based programs including Assertive Community Treatment (ACT), Supported Housing and Supportive Employment services. ACT is a service model provided by community-based, mobile mental health treatment teams. The ACT team approach is designed to provide comprehensive psychiatric treatment, rehabilitation, and support to persons with Serious and Persistent Mental Illness, or personality disorders with severe functional impairments, to live independently in the community. The Supported Housing program is designed for persons with SMI to assist them in living in an independent environment. The goal is for individuals to receive intermittent support while transitioning to the community and to achieve the greatest level of independence.



# No Show Reduction Project

A no-show initiative was started in July 2022 with the goal of reducing the percentage of members not showing up to appointments. No-shows impact access to care with individuals not receiving the services they need. The initiative began at the West Valley Integrated Health Clinic, with site leadership working with staff to identify structures and processes impacting no-show rates. The findings and strategies were presented to the other health clinics. There was a significant decrease in no-show rates over a six-month period. The aggregate no-show rate decreased from 24.5 % in June 2022 to 17.5% in June 2023.



## Value Based Contracts

Copa Health participates in numerous value-based contracts with Mercy Care and United Healthcare. These contracts range from permanent supported housing and supported employment to services offered in our integrated clinics. In 2023, Mercy Care collaborated with our ACO partners (APN) to introduce a new value-based contract for quality and utilization measures along with cost containment activities. We have cross-functional teams addressing each of these initiatives and anticipate a successful outcome.

# Utah Expansion

In 2023 Copa Health pushed forward by expanding integrated services to Utah. In the summer of 2023 Copa opened two locations: one in Murray and one in Magna. The Murray location is an outpatient integrated health clinic providing a full array of services to individuals from birth to geriatric. At Magna, Copa opened a 16-bed residential unit serving adolescents.



# Residential and Community Support Services



## Housing Programs and Supports

Copa Health has offered residential services since 1973. Today there are 18 homes for individuals with serious mental illness and 19 homes for individuals with intellectual and developmental disabilities providing home and community-based services to over 151 members. Copa’s program allows individuals with intellectual and developmental disabilities and those with serious mental illness to avoid costly institutional care including skilled nursing facilities, hospitals, or jails, saving taxpayers over \$6 million in the past year.

## Residential Services

Copa Health offers four licensed residential programs designed to provide short-term, structured, and supportive services to adults with serious mental illness (SMI). Often members come to Copa directly from an inpatient psychiatric hospital setting. Pre-authorized services promote recovery and are provided in a structured residential treatment setting with 24-hour supervision by behavioral health technicians. Services include counseling, therapeutic activities, skills training,

transportation, personal care, case management, and assistance with self-administration of medications.

### Copa Health’s Continuing Commitment to Providing Housing Includes:

- Community Based Housing
- Permanent Supportive Housing —HOPE program
- Supportive Housing and Permanent Employment —SHAPE program
- Community Supportive services —CSS
- Individually Designed Living Arrangements —IDLA
- Elder Care

Copa Health earned value-based contract incentives for it’s permanent supportive housing program - Hope - helping members with:



reduction in psychiatric hospitalizations



reduction in engagement with mobile crisis teams



of individuals increased income



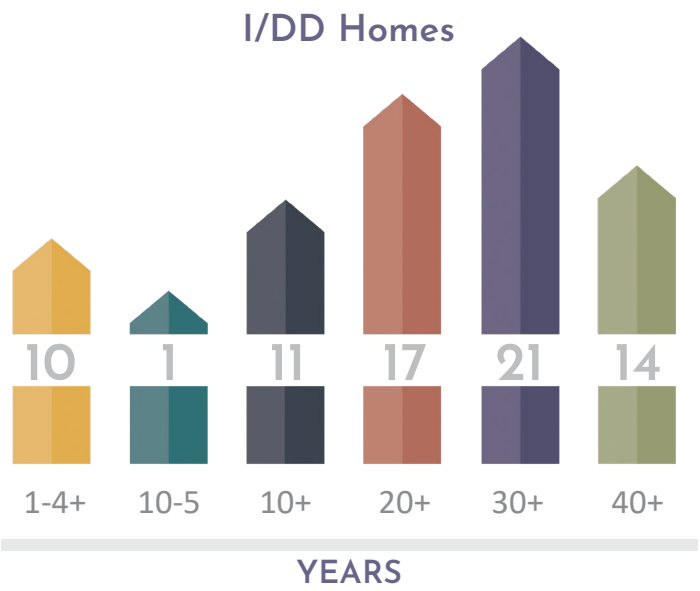
of individuals were served and maintained

## Community Living Services-(CLS)

Community Living Services help people who have disabilities to become as self-sufficient as possible within a home environment.

Copa Health provides 24/7 supervision in the homes. Services focus on home and community integration, engagement in daily living activities, individual needs, strengths, and abilities. Small, three-to-five-person group home settings provide an alternative

living situation for individuals served by Copa Health. Orientation to community, health, and wellness education, menu planning and meal preparation, environmental safety, advocacy, decision-making, and maintaining a home are skills taught in the homes.



# Lighthouse Program



# Employment Related Services & Day Programs




## Housing Programs and Supports


The Lighthouse Model is an evidence-based, supported housing environment and program based on the core principles of Housing First, recovery-oriented services, self-management, member engagement and family involvement. The model braids several evidence-based approaches to create a therapeutic milieu where individuals receive the support, services, and encouragement necessary for the emergence of recovery and resilience. The goal of the Lighthouse program is to provide a safe and stable environment with staff who assist and support the individual to remain successfully in the community and to live as independently as possible to develop a meaningful, purposeful, and fulfilling life. Lighthouse programs are distinguishable from other forms of supported housing by their ability to respond to symptoms therapeutically without threats of evictions for behaviors that are related to their illness.

The Lighthouse program has received national attention as a model that provides both positive clinical and financial outcomes. A report by the Arizona State University Morrison Institute quantitatively delineated that the financial costs of individuals with SMI in


permanent supportive housing were 28.7% lower than individuals with SMI experiencing chronic homelessness. In the 5-year study The Morrison Institute examined the Lighthouse Program and found that behavioral health costs declined 36%, while spending on physical health, pharmacy, and skills training increased, demonstrating a shift in spending away from crisis management toward recovery and personal development. When compared to their previous involvement in the criminal justice system, the Lighthouse tenants had no criminal justice interactions during the study period.



Arizona State University's Morrison Institute conclude that costs of individuals with chronic mental illnesses in permanent supportive housing were 28.7% lower than the costliest setting of chronic homelessness. The Lighthouse program demonstrated 36% reduction in behavioral health costs.



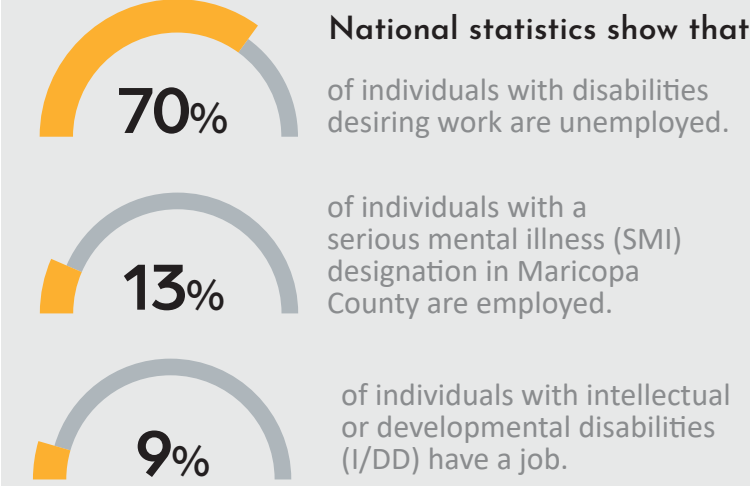
29%  
reduction in overall costs



36%  
reduction in behavioral health costs

## Employment Services

Copa Health has built one of the largest employment training programs for individuals with intellectual and/or developmental disabilities, general mental health, substance use disorder, and serious mental illness. This program places over 60% of its employment trainees with serious mental illness into community competitive jobs. The success of this program is driven by the determination and perseverance of our members and could not be made possible without the various partners and companies that come alongside us to increase employment opportunities for those we serve.



# Employment Related Services & Day Programs Cont.

## Day Programs and In-Home Supports

Day Programs and In-Home Supports aid families and caregivers to ensure members are safe, supported and thriving. These programs keep the family unit intact by allowing parents and caregivers to work while the member they care for is engaged in meaningful day activities that focus on living skills, socialization, and community integration.

In addition to providing caregivers with respite services, the In-Home Supports program provides living skills and personal assistance services that allow individuals to continue living within their own home or within the home of their family as opposed to foster homes, assisted living facilities, nursing care, or shelters.

Copa Health is an innovative leader in whole-person care. Our strength in innovation became especially critical and evident during the COVID pandemic. In addition to expanding telehealth, growing sites, and amplifying services, our Day Services were able to quickly pivot and create new opportunities for staff and improved services for members. One of the innovative services born out of these efforts was the Copa Mobile Gym.

The Copa Health Mobile Gym was created to meet our members where they are and take exercise, wellness, and healthy living to their doorstep or preferred location.

The members of the Mobile Gym take charge of their workouts while working alongside the Travel Wellness Coach to meet their pre-determined goals. The mobile gyms are a critical component of our whole-person approach to care. Through the gyms, our members work on a range of goals and skills they wish to improve upon. Prominent goals for our members include increasing attendance, measurable weight loss goals, mindfulness, strength training, and endurance gains.



## Day Program Success Story: Mobile Gym Testimonial

Copa Health Wellness Coach Dee, Ashley

One member that has benefited is Ashley. Since beginning her program under the supervision of Copa Health Wellness Coach Dee, Ashley has shown tremendous growth in the wellness side of her life. Since taking part in the program Ashley has lost over forty pounds and has improved her diet.

Copa Health’s Employment and Day Programs have seen significant growth:

- Peer Support Training expanded into Salt Lake City, Utah and six additional counties in Arizona: Pima, Pinal, Yuma, Navajo, Gila, and Apache.
- Supported Employment expanded to 3 additional counties in Arizona: Gila, Navajo, and Apache.
- The Villages program added two additional counties in Arizona: Navajo, and Apache.
- Improved Health: 70% of participants engaged in Community Day Services physical activities three times per week.
- Secured two additional mobile gyms.
- Secured five additional community enclaves for members participating in ERS.

The Mobile Gym comes to her usually two or three days a week. Her mother, Barbara, comments, “This program has been a godsend for my daughter’s health. She eats healthier and maintains a good schedule of exercise. We could not be happier.”



“I love the Mobile Gym because it allows me to plan my schedule for work and other things. I do circuit training, elliptical, crunches and barbells, and I exercise to workout videos – all in the Mobile Gym! It is fantastic!”

— Ashley

# People First



# Clinical Education

The People First (Human Resources at Copa) Strategic Plan guides every aspect of our department and maps out a course for our collective journey to become a world-class organization.

Team members across the People First community continue to make progress within the plan’s goals, objectives, and action items. Highlights include:

- Onboarding activities and dashboards as part of the New Employee Welcome Program allow for better understanding and visibility into required onboarding tasks.
- Embarked on new strategic support efforts including new employee onboarding, and mentoring process.
- Re-designed orientation for new employees in the office physical location, including sessions for staff, technical service, and tours.
- Enhanced business process, training, communication, and reporting related to the Performance Management Cycle. Launched supervision essentials to deliver critical information to all new supervisors.
- Realigned the Talent Acquisition roles to provide direct support to People First Strategic Partners.
- Developed a staff recruitment action plan to increase the quality of our recruitment with high quality candidates and a reduction in the time it takes to fill positions.
- Improved sourcing strategies to build diverse and highly qualified candidate pools. Continued delivery of instructor-led recruiter training for hiring managers.
- Developed automated solutions for the Tuition Reimbursement program, records/compliance, and management reporting.
- Created an expedited hiring and onboarding process to meet critical needs.

- Progressed in optimizing Labor & Employee Relations case management with new and improved processes.

The Compensation Initiative, an effort that will modernize Copa Health staff compensation and career structures to create competitive compensation structures and clear, supportive career development resources for staff members to use. The team created and implemented flexible, remote and hybrid work schedule arrangements across various units throughout the enterprise.



## Employee Well-Being

We have expanded employee well-being to focus on building a culture based on the seven pillars of employee well-being:

- Physical
- Emotional
- Financial
- Social
- Career
- Community
- Purpose

The Clinical Education department was established under the vision of CEO, Dr. Shar Najafi-Piper, in January 2020. Dr. Najafi-Piper recruited an exceptional leader in Dr. Diana Medina to execute the vision of Copa Health as a world-class training institution and to recruit and retain top talent to Copa. To achieve this goal Dr. Najafi-Piper and Dr. Medina developed two training programs: the Psychology Training Program and the Master-level program.



## The Psychology Training Program (PTP)

The Psychology Training Program (PTP) offers placement to doctoral psychology students, doctoral-level internship in Health Service Psychology (HSP) and a postdoctoral fellowship from August through July of the following year.

In the program’s first three years Copa Health has seen 38 graduates of this program.



## Master-level Training Program

Our Master-level training program provides individuals completing their master’s degrees in a behavioral health field the opportunity to complete their practicum and/or internship at one of our integrated health clinics. A critical component of this program is creating a space for educational and professional advancement opportunities inside our own organization for current employees who wish to grow in their own careers. 4 interns have completed the program and secured counseling positions.

This year, the internship program became accredited by the American Psychological Association, which allows Copa to engage in a more meaningful way with doctoral psychology trainees in all 50 states and Canada. Our trainees provide therapy services to members at each of Copa’s integrated outpatient clinics and in some residential facilities. They also provide training to staff in diversity and cultural competency issues and are key to running our Employee Support Group.

Retaining talent is a key component to providing the best possible care to our members. We have been successful in retaining 5 psychology trainees that have gone through the program. Three of our trainees have been hired as permanent staff and two have accepted post-doctoral fellowship positions with Copa.

These two programs – and Copa’s vision and commitment to the healthcare industry – are one way

Copa Health is investing in amplifying services. Our members benefit from the level of care they receive from trainees in both of our programs. And our trainees complete the programs equipped to offer much needed services. We are working to continue to expand and grow in the upcoming years.



# Looking to the Future: Housing & Healthcare



At Copa Health we believe housing and healthcare must co-exist to drive whole-person care and see the positive outcomes we expect to deliver for the individuals and communities we serve. With this in mind, we have embarked on two critical projects: Bower Park & La Victoria Commons.

## Bower Park

This collaborative project will provide services at a new transitional housing facility in downtown Phoenix at the northeast corner of 24th Street and Van Buren Street. The facility will provide transitional housing for up to 54 residents, as well as an integrated health care clinic open to the public. Initial capital funding for the project was approved by the Arizona State Legislature and supplemented with funds from the American Rescue Plan Act (ARPA).

Individuals with SMI have a higher level of need than can be fully addressed in large congregate shelter programs. Bower Park’s transitional living model will offer a trauma-informed, smaller, and more easily navigable, facility with mental health support specialists onsite and specifically designed and tailored services to address the unique needs of this population. This project will demonstrate a new approach to the current best practices of combined housing and co-located health care, serving some of Arizona’s most vulnerable citizens and supporting larger community efforts to address homelessness in Maricopa County.

The transitional housing facility is expected to serve at least 100 adults with SMI each year. In addition to the 100 adults in the facility, the integrated clinic will be open to the community including, but not limited to:

An innovative partnership between Copa Health, CASS, and AHCCCS to develop whole-person solutions for adults experiencing homelessness with a serious mental illness (SMI) designation, addressing immediate barriers to engagement, stabilization, recovery and permanent housing.

to, individuals in the nearby downtown 600-bed CASS shelter on 12th Avenue, the 200-bed St. Vincent de Paul shelter on Washington Street, UMOM on Van Buren, the new 200+ bed Sprung facility in South Phoenix, and the 170-bed CASS Senior Temporary Housing facility.

Expected outcomes include, but are not limited to:

- Creation of a transitional facility for individuals being discharged from emergency rooms, inpatient, or other shelter settings.
- Reduction in the number of people discharged to homelessness or unstable housing.
- Reduction in the number of unsheltered homeless persons with severe mental health needs.
- Rehabilitative services for clients served in the transitional housing facility.
- Daily and convenient access to the adjacent fully integrated clinic addressing immediate needs related to psychiatric services, PCP medical care, nursing, and counselling services.
- Intensive focus on housing, health, employment, and community navigation using evidenced-based interventions.

- Measurable positive outcomes for individuals and reduced total medical spending, which will demonstrate a sustainable model for homelessness that can be replicated.
- Transitional housing for up to 100 adults annually, along with housing navigation and follow up support placed in permanent housing with

measurable increases in housing placement and housing retention.

- Continuous evaluation and analysis of how to best serve a highly vulnerable population.



## La Victoria Commons

La Victoria Commons project in Tempe, Arizona represents innovation and collaboration at the highest level. The collaboration between Copa Health, Newtown CDC, and the City of Tempe will be built alongside the Light Rail to ensure access and transportation to work and services.

The affordable housing project includes 104 apartments and 19 townhouses. 30% of these will be set aside for individuals with a Serious Mental Illness designation, Autism, Substance Use Disorder, Developmental Disabilities, Intellectual Disabilities, and other special designations. The program will also include:

- An on-site, integrated outpatient clinic for residents of the apartments, townhome owners and the surrounding community.
- An onsite Copa Health operated café which will provide employment opportunities for our members.
- Community room for residents of the apartments, townhome owners and surrounding neighborhoods.

- Onsite services to assist with housing, employment, and clinical needs of Copa Health members.

Individuals who are being served by Copa Health and similar agencies will have access to on-site wrap-around services, removing time and travel barriers that often threaten access to care and recovery.

Affordable rental units, opportunities for first time homeowners, available medical care, employment assistance, access to transportation, and community gathering space is only the beginning. This partnership will allow many who are struggling to make ends meet to stay in jobs that are underfunded but critically needed. Teachers, healthcare workers, caregivers, and nonprofit employees will be able to continue or pursue their passion of helping others and still have affordable homes and access to so many services and opportunities that are measured through social determinants of health. We believe this partnership will become a model to be replicated throughout Arizona and the rest of the country.

# Innovation: Data & Technology



## Innovative Tech Solutions

In 2020 Copa Health implemented an innovative technological solutions with the potential to revolutionize healthcare by improving accessibility, diagnosis, treatment, and support for these individuals.

- Expansion of telemedicine enables remote consultations and therapy sessions, eliminating barriers of distance and transportation.
- Mobile applications and wearable devices assist in monitoring vital signs, tracking medication adherence, and promoting healthy habits.
- Electronic health records streamline data management, ensuring comprehensive and easily accessible medical information.
- Artificial Intelligence and automated data management can aid in the early detection of conditions, personalized treatment plans, and data-driven decision-making.

These advancements empower healthcare professionals to deliver tailored care, improve outcomes, and provide a higher quality of life for every Copa Health member.

Technology plays a pivotal role in enhancing overall healthcare services for members with intellectual and developmental disabilities, as well as mental health conditions, within organizations dedicated to their care.

## Data Driven Processes

Copa is on a mission to implement data driven processes to improve member care and staff experience. These processes are automation of data flows, informing and alerting providers to make decisions, and error reporting.

Our Information & Digital team has built an impressive data and reporting system. Our Information team has partnered with our Population Health team to focus on actionable reports, actionable alerts, problem identification, and training rollouts.

During 2022, our I&D team added eight new bots to automate business processes, 10 new data sources, developed seven new custom tools, and 189 new reports into Nexus.

We also:

- Expanded use of our Psych Survey tool
- Created and delivered a satisfaction survey to our members.
- Rolled out Microsoft Teams
- Added a backup telehealth solution (Doximity)
- Improved workflows for prescribers by integrating with AZ PMP and ASAM Continuum.

### IT Statistics

2,840 QM Incidents Tracked	293 Psych Survey Members	189 Nexus Reports	868 Reports Sheets	72 New HIE Users
341 Nexus Users	1,236 Psych Screenings	1,096 Satisfaction Surveys	717 CopaNet Users	95,824 Report Views
29 EHR Vendors Eval'd	700+ Doximity Calls	37% Telehealth Encounters	20K CopaNet Pageviews	
16K CopaNet Searches	1,260 Staff Alerts Delivered	521% Telehealth/Month (Since Inception)	2,893 Discharges Tracked	

### IT Year Total - EHR, HELP Desk Network

868	90	188	9,817
EHR Cases Resolved	RCM Requests Completed	Add, Move or Change (ACM) Requests Completed	YR Help Desk Tickets Resolved

# Fiscal Update



Copa Health has seen a marked increase in our revenue trends since FY18. This increase has been primarily fueled by the acquisition of Partners in Recovery (FY18), adding new programs, growth in members served, and earning value-based incentives.

In addition, Copa has:

- Opened new integrated health clinics to amplify access to physical, mental, and behavioral health services.
- Added homes for permanent supported housing to reduce homelessness and housing insecurity.
- Expanded contracts with corporations to provide more community-based employment training and meaningful jobs that promote self-sufficiency and independence.
- Constructed two HUD-funded low-income apartment complexes for individuals with intellectual and developmental disabilities.

Finally, Copa has been an industry leader in pursuing value-based contracts where a portion of health plan funding comes from achieving improved health outcomes for individuals served. Leveraging effective evidenced-based practices, Copa earned \$3.6 million of

At Copa Health, revenues have increased dramatically from \$22 million in FY10 to \$80 million in FY22.

value-based incentives in FY22 for exceeding contractual goals related to access to care for members served and for improving health outcomes that significantly reduced unnecessary medical costs.

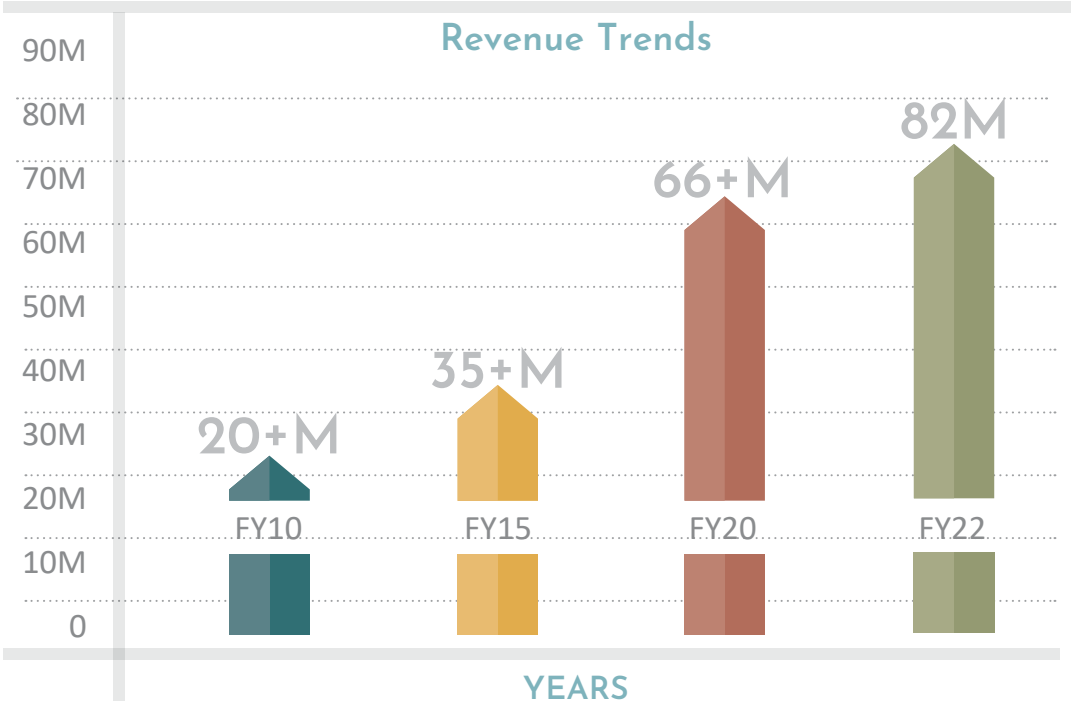
## FY22 Financial Data



**\$82M**  
Total Revenue  
in FY22

Expenses  
**\$77.7M**

Surplus  
**\$4.2M**



This increase was primarily fueled by the acquisition of Partners in Recovery in FY18, adding new programs, growth in members served and earning value-based incentives. The acquisition of Partners in Recovery and its outpatient clinics added roughly 7,000 new members and \$34 million in revenues, making Copa Health the largest integrated clinic operator for individuals diagnosed with serious mental illness.

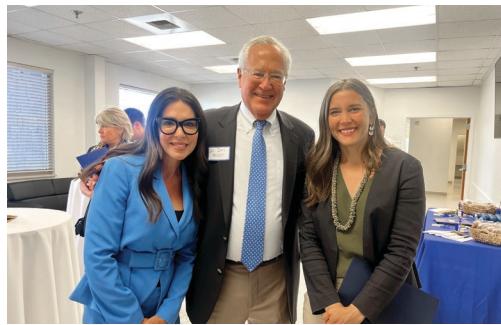
## Value Based Contracts

Copa Health has participated in numerous value-based contracts with payers such as Mercy Care and United Healthcare. These contracts included permanent supported housing, supported employment, and services offered in our integrated outpatient clinics. In 2023, Mercy Care collaborated with our ACO partners, Affiliated Network Providers (APN) to introduce a new value-based contract for quality and utilizations measures along with cost containment activities. Cross[1]functional teams address each of these initiatives and anticipate a successful outcome.

Copa Health has a robust reporting and tracking of details necessary to address these measures. Identification of high-risk individuals is a key to address their overall care and ensure appropriate wrap around supports are provided. Through a collaborative effort with the APN, we share best practices in treating our vulnerable population. Copa’s value-based relationship

with United Healthcare covers our SMI population served and focuses on quality measures along with utilization.





In the past four years, Copa Health has made remarkable strides in fulfilling our mission to provide essential housing and healthcare services to those who need it most. Through unwavering dedication and the incredible support of our community, we have transformed countless lives. We are deeply grateful for the trust and commitment shown by our community, which has enabled us to expand our impact significantly.

Our journey has been one of profound growth and transformation. We have not only provided vital housing solutions but also facilitated access to meaningful employment opportunities and comprehensive healthcare for our members with complex care needs. The collaborative spirit within our organization and the commitment from our community have been instrumental in propelling us forward.

As we reflect on our achievements over the past four years, we remain committed to our vision of a healthier, more inclusive community. With your continued support, we are excited to embark on the next phase of our mission, further expanding our reach and positively impacting the lives of even more individuals in need. Thank you for being an integral part of the Copa Health journey. Together, we are creating a brighter, more hopeful, and healthier future for all.

— Dr. Shar Najafi-Piper, Copa Chief Executive Officer





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