**TRANSITION DOCUMENT**

**Name of Client (Person Signing Contract):**

Anne and Phil

**Practice Name, Tagline, Address, Phone, Fax, URL:**

Rosecrance Health Network

Main office is in Rockford. Please look at the website for all of the locations and services they offer. They are in 5 DMAs.

Locations

With more than 40 locations in Chicago, Illinois, Wisconsin and Iowa, Rosecrance offers comprehensive addiction services for adolescents and adults, including prevention, intervention, detoxification, inpatient and outpatient treatment, experiential therapies, dual-diagnosis care and family education. Rosecrance also offers high-quality, efficient and effective outpatient mental health services for children, adults and families through a variety of programs. Rosecrance serves more than 32,000 families each year.

[**Rockford**](http://www.rosecrance.org/facilities/rockford-offices/)

[**Chicago Area**](http://www.rosecrance.org/facilities/chicago/)

[**Wisconsin**](http://www.rosecrance.org/facilities/wisconsin-offices/)

[**Champaign/Urbana**](http://www.rosecrance.org/facilities/champaign-offices/)

[**Quad Cities**](http://www.rosecrance.org/facilities/quad-cities-office/)

**Client Key Personnel (with Phone & Email Info):**

My main two contacts have been Anne and Janice. They both attended our seminar in Chicago this year. They championed us back to Phil and got this project started.

Anne Boccignone, MBA

*Vice President of Communications & Development*

Anne Boccignone oversees The Rosecrance Foundation, public relations, strategic planning and church relations. Anne Boccignone joined Rosecrance in October as the new vice president of development. Boccignone hails from Beloit, Wisconsin, and has more than 20 years of experience in private, public and nonprofit sector marketing and communications. During that time, she spent more than a decade working in the advertising industry in Minneapolis. She most recently worked as a brand strategist for Rockford strategic communications firm GrahamSpencer. Anne joined Rosecrance in 2014.

Janis Waddell, MS, CSADC

*Senior Vice President of Marketing*



Janis Waddell oversees all local, regional and national marketing efforts of the organization including working with private and public sector referral sources. She has more than 30 years’ experience in the addictions field, including 10 years of providing direct clinical services to adolescents. She earned her Bachelor’s Degree in Education from Western Illinois University and a Master’s Degree in Counseling/Education from Northern Illinois University. Her areas of expertise include behavioral healthcare marketing, insurance managed care contracting, adolescent and adult substance abuse treatment, and current trends. Janis joined Rosecrance in 1984.

Philip W. Eaton, MS

*President/CEO*

Philip Eaton was named President/CEO of Rosecrance Health Network in 1982, but his connection to Rosecrance began in 1971 as a young social worker. His understanding of the roots of Rosecrance and his vision for the future has set the standard for the organization for more than 30 years. Under his leadership, Rosecrance opened Northern Illinois’ first chemical dependency treatment center for adolescents and Illinois’ only licensed recovery homes for female adolescents. Eaton holds a Master of Science Degree in Community Mental Health from Northern Illinois University and a Bachelor’s Degree in Sociology from Trinity College. He has served as Chairman and a Board member of the National Association of Addiction Treatment Providers (NAATP) and the Illinois Alcoholism and Drug Dependency Association (IADDA). Eaton was awarded the Northern Illinois University College of Health and Human Services Alumni of the Year Award in 2001; the Administrator of the Year Award by the American College of Addiction Treatment Administrators in 2002 and was the recipient of the Distinguished Community Award from the University of Illinois College of Medicine in Rockford in 2002. In 2011, Eaton was named Alumnus of the Year by Trinity College in Deerfield, IL.

OTHER KEY PRESONNEL

LIST KEY PERSONNEL IN YOUR BUSINESS YEARS WITH THIS BUSINESS

Philip W. Eaton, President/CEO 46 years with Rosecrance

David Gomel, PhD, President of Rosecrance Inc. 24 years with Rosecrance

John Schuster, Senior Vice President and Chief Financial Officer 6 years with Rosecrance

Janis Waddell, Senior Vice President of Marketing 32 years with Rosecrance

Anne Boccignone, Vice President of Communications & Development 3 years with Rosecrance

Craig Stallings, Admin, Adult Substance Abuse Treatment 20 years with Rosecrance

Steve Smith, Admin, Child & Adolescent Services 7 years with Rosecrance

Chris Gleason, Admin, Regional Behavioral Health Services 6 years with Rosecrance

Jason Gorham, Director of Rosecrance Griffin Williamson Campus 27 years with Rosecrance

Craig Riehle, Director of Access 13 years with Rosecrance

Mary Egan, Director of Outreach Chicago 9 years with Rosecrance

Carlene Cardosi, Clinical Director 7 years with Rosecrance

Meghan Cook, Access Coordinator, Griffin Williamson Campus 9 years with Rosecrance

**HSS Team:**

***Marketing Consultant:*** KG

***Account Manager:*** Jenn

***Writer:*** Greg ( I think)

**What are the personal details about this client?**

* Who answers the phone? They have a phone bank. The mystery calls revealed a significant problems. They answer the phone “is this mental health or addiction”
* What kind of training have they had? I don’t think they have had any
* What tracking protocols do you currently have in place? It is intermittent
* Etc.

**How did this organization come to be a client of HS? Why are they interested in marketing now?**

They attended our Chicago seminar. Following is an excerpt from their website regarding their history.

FROM THE WEBSITE

Help Hope Recovery®

With more than [40 locations](http://www.rosecrance.org/locations/) in [Chicago](http://www.rosecrance.org/facilities/chicago/) and [Northern Illinois](http://www.rosecrance.org/facilities/rockford-offices/), [Wisconsin](http://www.rosecrance.org/facilities/wisconsin-offices/) and [Iowa](http://www.rosecrance.org/facilities/quad-cities-office/), Rosecrance offers [comprehensive addiction services for adolescents](http://www.rosecrance.org/substance-abuse/adolescent-services/) and [adults](http://www.rosecrance.org/substance-abuse/adult-services/), including prevention, intervention, detoxification, [inpatient](http://www.rosecrance.org/substance-abuse/residential-drug-rehab-treatment-center/) and [outpatient treatment](http://www.rosecrance.org/substance-abuse/outpatient-alcohol-drug-rehab-chicago/), experiential therapies, dual-diagnosis care and family education.

Rosecrance also offers high-quality, efficient and effective [outpatient mental health services](http://www.rosecrance.org/mental-health/) for children, adults and families through a variety of programs. Rosecrance serves more than 32,000 families each year.

History from their website

The Rosecrance story shows how a responsible organization evolves through the decades to meet a community’s changing needs. Founded as an orphanage for a handful of boys in 1916, Rosecrance has become a comprehensive behavioral health network serving more than 32,000 families each year.

That transformation accelerated in November 2010 with the affiliation between Rosecrance and Janet Wattles Center, the region’s largest provider of community mental health services. The two organizations formally merged on Sept. 1, 2011, to create the state’s most comprehensive network of behavioral health services.

Addiction treatment services primarily are provided at two large inpatient facilities in Rockford: Harrison Campus for adults and Griffin Williamson Campus for adolescents. Rosecrance also has five offices in the Chicago area.

Mental health services, all outpatient, primarily are provided at the Ware Center in downtown Rockford, which serves the adult population, and at the Berry Campus, which serves children and families.

The common theme of operations at Rosecrance and Janet Wattles before the merger was their mutual commitment to providing quality evidence-based treatment to the people they served. Their joint mission now is to provide help, hope and recovery to children, youth, adults and families.

**Children the focus of Rosecrance early years**
The history of Rosecrance traces to Dr. James and Fannie Rosecrance, who left provisions in their wills to establish an orphanage for boys. Upon Fannie Rosecrance’s death in 1916, the couple’s homestead in New Milford became the Rosecrance Memorial Home for Children. The orphanage remained at that site for 55 years, when the Rosecrance Board of Directors purchased farm land on Alpine Road in Rockford and built a new campus there.

Rosecrance on Alpine

As the foster care system evolved in the late 1960s and 1970s, Rosecrance began to serve children with behavior disorders. In 1982, Rosecrance formally changed its mission to offer adolescent addiction treatment. The Rosecrance Center, which was initially licensed for 20 inpatient beds, was the first chemical dependency treatment center for adolescents in Northern Illinois.

In August 2004, Rosecrance opened a new $14 million, 78-bed campus to serve youth on University Drive in Rockford. The Griffin Williamson Adolescent Treatment Center is the largest inpatient treatment program in the state. Rosecrance also serves youth through prevention and outpatient services and through recovery homes for teens. The organization’s long-term teen recovery homes, a program started in 1997, are among only a handful of such facilities in the nation. Boys are served at Hillman House. The girls recovery home, Marlowe House, is the only licensed program of its kind for girls in the state of Illinois.

**Adult services added in 1992**
Rosecrance began offering treatment for adults in 1992, when the organization acquired the Evergreen Recovery Center in downtown Rockford. The program had 32 inpatient beds. To better serve the treatment needs of the adult population, Rosecrance closed Evergreen and opened a new 72-bed treatment center on Harrison Avenue in Rockford in November 1995. The campus has twice been expanded and renovated, and it now has an inpatient capacity of 98.

Rosecrance also operates Greendale House, a transitional housing program for single men and women and women with young children.

Rosecrance continues to enhance services for children, adolescents, adults and families. We are the leading provider of alcohol and drug addiction treatment in Northern Illinois and are nationally recognized in the field.

**Ware Center and Berry Campus**
The Winnebago County Mental Hygiene Society was founded in 1947, and many of the agency’s first consumers were veterans returning from World War II.

The clientele expanded dramatically when, during the 1960s, many thousands of individuals with serious mental illness were released from institutions and returned to their home communities. Stepping up to meet their treatment needs, the local agency began its long history of outpatient services to the individuals with chronic mental illness. Through the years, the agency became known for serving indigent and low-income residents with chronic conditions who could not find treatment elsewhere.

One of the center’s most dedicated supporters was a local real estate agent and civic volunteer named Janet Wattles. So committed was she to the Center’s work that the board decided to name the agency in her honor. And so, from 1972 until September 2011, the agency was known as the Janet Wattles Center. The current name of the downtown adult services building, the Ware Center, honors the longtime president/CEO Frank Holmes Ware, who died Feb. 13, 2011, shortly after the collaboration with Rosecrance was announced.

From services to adults with chronic mental illness, the Center expanded programming in the 1980s to serve youth with severe emotional disturbances. As demand for youth services grew, it became apparent that the Center needed space beyond what was available at the downtown center on West State Street. In 2007, the Center opened the Mildred Berry Center on the city’s far east side. It was named for a renowned speech pathologist and children’s advocate. Now called Berry Campus, the building offers programming for children with emotional disorders and their families. The Berry Campus also contains a Family Resource Center, which offers a variety of services and educational resources to help families.

**Other endeavors**
The Ware Center and Berry Campus created several other programs that serve a niche in the community.

The Silver Lining Clubhouse is a psychosocial program that provides extensive rehabilitation and recovery services for adults. It operated from a separate building on 22nd Street for a dozen years before being relocated to the Ware Center in 2011.

The Stars of Light Theatre Troupe, which is made up of patients, staff and volunteers, presents programs to area schools, churches and social clubs to educate about mental illness and reduce stigma. The group has won several state and local awards. In 2011, the group received the Volunteer Group of the Year Award from the United Way of Rock River Valley.

The Ware Center also offers vocational rehabilitation programs and Community Integrated Living Arrangements (CILA). Under the direction of the late Frank Ware, the agency developed a number of 24-hour supervised and supported housing units in the community. In 2010, the Center received a federal grant to provide transitional housing for homeless veterans with serious mental illness.

Through its addiction and mental health services, Rosecrance has collaborated with the 17th Judicial Circuit on numerous grants and programs to serve individuals who are involved in the criminal justice system. Rosecrance has been an active player both in the formation and ongoing operation of the “mental health court” and the “drug court.”

The agencies merged in 2011, in part, to provide improved services for a growing number of individuals who have co-occurring disorders and need both mental health and addiction treatment.

All Rosecrance programs are fully accredited by The Joint Commission and licensed by the Illinois Department of Human Services.

**STATS**

Avg No. of New Referral Sources per Month: 31

Number of clients in our alumni database: 363

Product/Service Average Annual Private Pay/Commercial Revenue

Residential/Teen $6,878,000

Residential/Adult $12,898,000

Total Private Pay Residential and

Outpatient Substance Abuse Services,

plus Mental Health Outpatient; $26,675,000

Top 5 Most Financially Lucrative or Desirable Products/Services:

1. Adult residential substance abuse services (nonpublic)
2. Adolescent substance abuse services (nonpublic)
3. TMS services (nonpublic)
4. Outpatient including IOP substance abuse services (nonpublic)
5. Private counseling

Bottom 5 Least Financially Lucrative or Desirable Products/Services (start with least lucrative/desirable as #1):

1. Community mental health services which is all state funded.
2. Public adult residential substance abuse services
3. Individual treatment services
4. Any Medicaid service in either substance abuse or mental health
5. Pharmacy services

**What are the timing issues discussed with the practice?** (E.g., new doctor coming on-board, training needed ASAP, need stationery now, etc.)

They ar elooking to adhere to their fiscal year which is July to June

**Marketing & Practice Objectives:**

* Optimize case size. We need to genrate more high income producing addiciotn patients and decrease the % of mental health
* **Positioning:**

## From the website –

## What we believe

#### Our mission

Rosecrance provides help, hope and recovery to children, youth, adults and families.

#### Our vision

Lasting recovery helps individuals achieve full potential, restores families, and strengthens communities.

#### Our core values

**Excellence:**We embrace the challenge of continuous performance improvement.

**Integrity:** We reflect the highest ethical standards.

**Compassion:** We seek to serve through the loving example of Christ.

**Recovery:** We believe in the power of fellowship, hope and the desire of every human spirit to heal.

**Diversity:** We value the unique contribution and worth of each individual.

**Spirituality:** We acknowledge the presence and power of God as central to the recovery process.

**Commitment:** We dedicate ourselves daily to the needs of those we serve.

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**SWOT**

* **SWOT Analysis – November 2016**
* **Strengths**
* Brand/Reputation
* Payer Mix
* Clinical excellence
* Forward leaning
* Vision clarity
* Passion
* Mission
* Competency/dedication of our staff/teams/workforce
* High quality services
* Long history/reputation of quality (doesn’t mean much to new audiences necessarily)
* New administration
* Millennials
* Successful treatment provider
* Deliver best or evidence based treatment
* Structure
* Excellence/Knowledge in SA/MH industries
* Our donors
* Our Board
* Quality of Care (Law Litigation)
* Compassionate & Committed staff
* **Weaknesses**
* Front door/process for admission
* Managing larger size –
* Bureaucratic
* Longer decision time
* Not agile
* Empower the directors more
* Staffing
* Turnover
* Gaps
* Difficulty filling specialized roles
* 50% Public Funding
* Reimbursement rates
* Reliability
* Discussion:
* Bureaucracy - is scale enough to make it work for us, save us $$
* Is $100K the goal?
* Helping departments understand their scope/parameters and let them work up to that level.
* Metrics
* **Opportunities**
* Alternative funding/1115 waiver
* New service lines and programing
* Understand changing environment & refocus our resources
* TTT inquiries
* Expanded footprint
* Parity
* Large population in close proximity (Chicago/Milw/Madison)
* High adaptability of staff/organization
* Recheck and fix flow of front door/admissions
* Expand lines of service without drifting from mission
* Mental health residential
* New treatments
* New business potential with changes in landscape, eg. More people have insurance coverage
* Tell more people about Rosecrance – develop “Friends & Family” network
* Partner with medical surgical hospital offering behavioral health solution
* Expand IOP service lines
* Geriatric psych
* Pilot w/ managed care
* Discussion:
* Funding Landscape is changing
* Another merger?
* Distance management
* Details of #1 & #2
* **Threats**
* Growing Competition
* Changing payer, finances and contracts
* Trend away from Residential
* Overhead Cost
* IL financial problems/fiscal pressures/reimbursement cuts
* Underestimating  competition
* Uncertain external environment
* Staff recruitment and retention
* Perception of substance abuse
* For-profit monsters
* Uncommon competition, ie. New, never before BH providers
* Not making changes quickly enough
* New finance models

**Barriers, Threats & Weaknesses:**

* Market thonlks they are mental health

**Projects/Services On Contract:** (Include any details discussed, why you sold these products/services, and what their priority is.)

* [Click to type]

**Training Issues / Expectations:** (Please oiutline the issues as you see tham and *exactly* what you want included and what the client is expecting. Include typf of training, total number of days, and issues to be covered on those days.)

* 5 days, focus on the phones. Janice has the outreach teram pretty well taken cre of. She will be open to input but I want to be carful not to step on toes.

**Gateways:**

* Addiction
	+ Teen

Teen substance abuse services

Addressing a teen’s struggle with substance abuse means understanding the emotional, developmental, physical, psychological, familial, social and cultural factors involved in their addiction. At Rosecrance, we have developed an evidence-based, 12 Step-based program that incorporates clinical, medical, educational and experiential therapies into a comprehensive individualized treatment plan.

Your length of stay in any treatment programs is dependent on your progress and accomplishment of treatment goals — as determined by you, your counselor and, when appropriate, your family.

PLEASE REVIEW THE WEBSITE IN ITS ENTIRETY – Following are a few pertinet links

[**CORE
SERVICES**](http://www.rosecrance.org/substance-abuse/adolescent-services/#content)

[**WHAT SETS US APART**](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/#content)

[**FOR
FAMILIES**](http://www.rosecrance.org/substance-abuse/adolescent-services/families/#content)

[Medically Monitored Detoxification](http://www.rosecrance.org/substance-abuse/adolescent-services/)

[Residential Treatment](http://www.rosecrance.org/substance-abuse/adolescent-services/)

[Partial Hospitalization](http://www.rosecrance.org/substance-abuse/adolescent-services/)

[Intensive Outpatient Treatment](http://www.rosecrance.org/substance-abuse/adolescent-services/)

[Recovery Homes](http://www.rosecrance.org/substance-abuse/adolescent-services/)

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[**WHAT SETS US APART**](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/#content)

[**FOR
FAMILIES**](http://www.rosecrance.org/substance-abuse/adolescent-services/families/#content)

[Psychiatric Services](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Experiential Therapies Department](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Recreational Therapies Program](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Art Therapies Program](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Music Therapies Program](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Horticultural Therapies Program](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Family Programming](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Recovery Lifeline](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Healing Garden](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Prevention Education](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

[Interventions](http://www.rosecrance.org/substance-abuse/adolescent-services/what-sets-us-apart/)

* + Adult
* Mental Health – to a very small degree

**Most Desired Gateways***(Of the above gateways, which ones do you most want to promote?)*

* Addiction for teens and adults

**Marketplace Profile, Target Audience Demographics, Etc.:**

* 5 DMAs

**Prior or Existing Marketing Efforts / Current Advertising:**

* See dropbox. They provided a lot of their collateral. They have done outdoor in the Chicago market. They stopped because they didn’t have tracking data to support its success or failure. They have also spent about $18K on line monthly. Website was built about 7 eyars ago. The know it needs to be redone. They have also done print and radio. Charlie has been brought up to speed on their previous marketing efforts.
* Janice runs the “outreach” group. I recommended new collateral for this team but Anne decided to gold off at the last minute. The have a lot of collateral we can use in the interim. They are also looking to use their current outdoor and radio collateral. They are asking us to create new, but want to see if we can alternate the old create in with the new, if it makes sense, se they old collateral adheres to their brand guidelines, it has some traction and they like it. Up for discussion.

FROM THE MQ

CURRENT MARKETING (last 12 months)

Activity Total Cost Total Revenue I see this as a…

 5 Marketing Reps \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_  Opportunity  Challenge  Non-issue

 3 marketing focused outreach \_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_  Opportunity  Challenge  Non-issue

counselors

 Direct Marketing Budget $250,000 \_\_\_\_\_\_\_\_\_\_\_\_\_  Opportunity  Challenge  Non-issue

 Radio Campaign in Chicago $167,000 \_\_\_\_\_\_\_\_\_\_\_\_\_  Opportunity  Challenge  Non-issue

 Radio Campaign in McHenry Co. $20,000 \_\_\_\_\_\_\_\_\_\_\_\_\_  Opportunity  Challenge  Non-issue

 Digital Campaign $361,000

(Search, Display, Social)

 SEO $24,000

 Trade Print Advertising $30,000

 TMS Digital Campaign-Madison $15,000

 Chicago Print Adv-Lakeview Intro $30,000

 Collateral $75,000

 Community/School Public $100,000

Speaking/Advocacy

 Market Study w/Referral Sources $38,000

**Media History:**

* Do we have their authorization to place media form?
* Not yet. They are still deciding whether to implement trational media in the Champaign market. Charlie did a compelte media overveiw for all of the DMAs, they have asked to start in the Champaign market only.
* **Offers Tried:**
* Didn’t dicuss – free consult

**Offers HS Recommended:** (If any)

* Free consult either in the facility of via Skype.

**Competition:** (List all competitors. Also share any specifics abou thte compeititive situation that were discussed with the client. . Please include websites, even if you have to search for them!)

* COMPETITION
* . COMPETITIVE ANALYSIS (To be filled out by PRACTICE OWNER)
* Please list your most significant competitors:

|  |
| --- |
| * **Local/Regional**
 |
| * Abraxas in Woodridge
 |
| * Alexian Brothers
 |
| * Chestnut Health Systems
 |
| * Gateway
 |
| * Hazelden
 |
| * Linden Oaks
 |
| * Timberline Knolls
 |
| * Rogers Memorial Hospital
 |
| * **National**
 |
| * Acadia Healthcare
 |
| * Advanced Recovery Systems
 |
| * American Addiction Center
 |
| * Cumberland Heights
 |
| * Hazelden
 |
| * Northbound Treatment Program
 |
| * Visions
 |
| * Wilderness Programs
 |
| * **Intensive Outpatient Programs**
 |
| * Central DuPage Hospital
 |
| * Child And Adolescent Family Recovery Center
 |
| * Fair Treatment Program
 |
| * Highland Park Hospital
 |
| * Hinsdale Hospital
 |
| * OMNI Youth Services
 |
| * PEER Services
 |
| * Presence Behavioral Health
 |

**What, if any, are the additional HS opportunities beyond the current contract?** (Please explain the opportunities as you see them and why were were not included in the current contract/phase.)

Larger digital budget, traditional media, collateral

**Creative Preferences:**

* See Brand Guidelines

**Other Notes:**

* [Click to type]

*– end –*