To all the BHRS community of clients, families, and partners:

Earlier this year, I held meetings throughout the County to share with you an idea about how to bring our services closer to the people who need them (“Community Service Areas” –for more on this please go to www.smchealth.org/BHRSGoodModern).

The input received in those conversations with over 1,000 persons was consistent: not one of you said that this idea was not worth pursuing. On the contrary: you asked me to go back to the drawing board, and continue exploring this idea further, taking your input into account in order to achieve more clarity on how a CSA would work.

I took that input, worked on it with BHRS’ management team, and we came up with a process. The most recent expression of that process (by no means, the last), was a weeklong workshop—a retreat of sorts- held between November 5 and 9. 35 dedicated participants came with lots of questions, yet with open hearts and minds. What happened during that week was transformative beyond our wildest dreams: not only did this group further the CSA idea in a thoughtful, creative, and provocative manner, but it also coalesced around the project, developing new relationships, deepening existing ones, committing their energy and their time to make this a reality for our clients, families, and communities (see quotes from participants at the bottom of page #3).

I was moved, amazed, and grateful, especially grateful this Thanksgiving season, to witness such “magic” unfold—as one of the participants put it.

This group of 35 individuals was representative of the diverse community of stakeholders and of the geographic breadth of our county, and it included staff, partners, clients, family members, and advocacy organizations (see list of participants below). Their charge was: 1) To identify novel ways to meet each community’s behavioral health needs utilizing all staff, contracted resources and untapped community resources; 2) To identify a set of core services that each CSA should have; 3) To most effectively use our wide range of specialty expertise and resources.

The week was dedicated to investigating at a deep level how our current processes work, thinking of new ways to examine and conceive a “future state” system of care; the week also allowed us to begin to identify what it would take to realize this vision, and to outline what our next steps should be.

Now we will move into the next stage, where we will be working in specific communities around the county (starting with the Redwood City/Fair Oaks area), with additional stakeholders, in order to understand what supplemental services are deemed needed in those communities in addition to the core services identified through this part of the process.

I am looking forward to joining with other key stakeholders as we move closer to implementing these changes on behalf of our current and future clients, their families, and the communities in which they live.

Wishing you a fulfilling Thanksgiving season,

Steve

ps.: A Communications Plan is being developed, which will provide much more detail. We are committed to keeping you informed, so please stay tuned for future updates.

“Your wellness, your way, your community”
<table>
<thead>
<tr>
<th>PARTNERS (non-BHRS)</th>
<th>Affiliation(s)</th>
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<tbody>
<tr>
<td>Avilés, Jeanette</td>
<td>Primary Care</td>
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<td>Bartolome, John</td>
<td>Asian American Recovery Services</td>
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<td>Chaikind, Janet</td>
<td>Primary Care (Pediatrics)</td>
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<tr>
<td>Delgado, Crispin</td>
<td>Health Policy and Planning (Health System)</td>
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<td>Gadda, Monica</td>
<td>Edgewood Center for Children and Families</td>
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<td>Greenberg, Brian</td>
<td>InnVission Shelter Network</td>
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<td>Jones, Kevin</td>
<td>Telecare</td>
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<td>Mattei, Don</td>
<td>Law Enforcement</td>
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<td>McNair-Knox, Faye</td>
<td>OneEPA</td>
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<tr>
<td>Mills, Ray</td>
<td>Voices of Recovery / Client</td>
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<td>Pelletier, Anjanette</td>
<td>Special Education Local Plan Area (SELPA)</td>
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<td>Robison, Steve</td>
<td>NAMI (San Mateo Chapter) / Family Member</td>
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<td>Rodriguez, Chris</td>
<td>Aging and Adults Services (Health System)</td>
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<td>Tomlinson, Robin</td>
<td>El Centro de Libertad</td>
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<td>Torres, Debbie</td>
<td>Human Services Agency</td>
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<td>Villanis, Christine</td>
<td>Probation Department</td>
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<tr>
<td>Wilson, Nancy</td>
<td>Mental Health and Substance Abuse Recovery Commission (MHSARC) / Client</td>
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### BHRS STAFF
Amezcua, Eliseo / Boyle, Matt / Carr, Kacy / Chu, Shirley / Demarco, Toni / Du, Nan / Dwyer, Ellie / Gayle, Linford / Harrison, Lee / Miles, Pat / Moncada, Héctor / Munson, Steve / Muckel, Adriana / Oceguera, Rosamaría / Saggese, Claudia / Sorbo, Paul / Taylor-Fullerton, Mary / Wallace, MaryEm

### CORE PLANNING TEAM / CONSULTANTS
BHRS: Clausen, Keith / Davila, Judy / Kaplan, Stephen (Executive Sponsor) / Santana-Mora, Sandra

**Kaizen Promotion Office:** Mehta, Viral

**Rona Consulting:** Kudo, Miwa / Schowengerdt, Dan
Q: What is “3P”?
A: The acronym 3P (Production Preparation Process) is a systematic, cross-functional application of Lean Principles for development of a Product or Service. Adapted from other industries, this technique brings together stakeholders, content experts, and the observations of clients/families in a workshop format to:

- Deeply explore and understand how current processes (services) are performing.
- Assess innovations found elsewhere but applicable, to unfreeze perceptions and “leap forward” in design thinking
- Create and model a new “forward looking” concept of service
- Determine the attributes needed to operationalize
- Develop a first draft of the plan to implement the concept

Q: Why is 3P the method used to develop our future?
A: Encouraging feedback had been received on the Community Service Area (CSA) Proposal that BHRS Leadership decided to move forward with planning to operationalize it. Having observed how the San Mateo Medical Center successfully used the 3P approach in the preparation of their new South County Primary Care Clinic, BHRS opted to use a similar process, bringing together stakeholders, and informed by clients and family members to develop and verify the concept. This is just the beginning of phase 2, which will offer plenty of opportunity for involvement and engagement of additional stakeholders. It is worth noting that the initial phase (which we called “Listening Sessions”) offered the “10,000-foot view” of the CSA model. The 3P workshop (phase 2), developed the “2,000-foot view” (a deeper description of how a CSA would operate). We are now moving into phase 3, which will further develop the “ground level” detail.

QUOTES FROM PARTICIPANTS:

“Thank you again for including me in the process, and looking forward to my continued involvement.”
Debbie Torres

“It was a welcome, energizing paradox: a large government system encouraging creativity and innovation for positive change – I was pushed to stretch my brain and step far outside of the box as we imagined a more hopeful community.”
Mary Taylor-Fullerton

“I found the week energizing!”
Claudia Saggese

“I came away from the week with a sense of awe and inspiration. I feel like I was privileged to be a part of a great moment in history and the beginnings of something that will change the world (or at least the world of mental health and substance use recovery treatment systems).”
Lee Harrison

“It was a privilege to be included among the talented individuals who worked so diligently on laying a foundation for transformation of San Mateo County’s Behavioral Health and Recovery Services Division for the greater good and, in the process, to be afforded an opportunity to give voice to needs specific to the East Palo Alto community in the beginning stage of this important process.”
Faye McNair Knox, PhD

“The process was uniquely designed, and I am confident that it will result in more cost efficient and effective behavioral health services in San Mateo County. The ultimate beneficiaries will be a wide range of stakeholders, but especially our community of clients.”
Brian Greenberg

“I had a great time and want to thank you for allowing me to participate in the process. Whatever you need from me regarding this effort please let me know.”
Don Mattei

“After the week, I now feel I have the right tools to tackle changes and make my efforts count.”
Shirley Chu

“It was a profound experience of working together with very dedicated people to create a future blueprint for the county services to continue to improve and enhance its role as an integral part of the community.”
John Bartolome

“It was a deeply inspiring week based on trust, shared purpose, and a willingness to be used in the service of something greater.”
Matt Boyle