CalHIVE
BEHAVIORAL HEALTH INTEGRATION

2025 Annual Convening
Successes, Systems and Sustainability
Participant Workbook

Tuesday, May 13, 2025
Long Beach, CA

Contents

ABOUT THE EVENT

Greetings and welcome to the 2025 CalHIVE BHI in-person convening! We are excited to bring teams together for our day-long learning and collaboration session.

The Desired Impact

As a result of this session, we hope attendees will have:
- Presented successful BHI practices
- Analyzed data trends from pilot site measures (process and financial)
- Identified continued improvement opportunities to integrate behavioral health into primary care
- Co-designed CalHIVE BHI sustainability plan
- Evaluated small tests of change and identified key opportunities to enhance Behavioral Health Equity Improvement Plan
- Celebrated cohort success

The People

All eight organizations participating in CalHIVE BHI are in attendance today, in addition to guests from other invited partner organizations. See more detail on who's in the room in the Attendance Roster (pages 19 - 20).

Participating Organizations and Vision Statements:

Chinese Hospital, a hospital system with locations in San Francisco and Daly City		Is dedicated to build a culturally and linguistically competent behavioral health center to lower the barriers for our community in accessing behavioral health care.
Community Memorial Healthcare, a hospital		Every patient is seen, heard, and offered compassionate, culturally sensitive, and holistic guidance for their mental health journey.
Perlman Clinic, a multi-site primary and specialty care clinic in San Diego		Every patient deserves access to appropriate resources driven by evidence-based care. To build systems that enable PCP's to confidently care for those with behavioral health needs that impact their overall wellbeing.
Pomona Valley Hospital Medical Center, a medical center located in Pomona		To provide sustainable integrated behavioral health care to meet the needs of every patient.

Riverside Family Physicians, a primary care practice in Riverside	Riverside Family Physicians	To foster a culture that embraces continuous improvement and positive changes on improving patient and staff well being.
San Francisco Health Network, a multi-site Federally Qualified Health Center (FQHC) and part of San Francisco's public health system	San Francisco Health Network SAN FRANCISCO DEPARTMENT OF PUBLIC HEALTH	To promote and support the well-being of all SFHN Patients through seamless care team collaboration.
Scripps Health, a health system (hospitals and ambulatory care) based in San Diego	Scripps	Bringing comprehensive, compassionate and supportive behavioral health to southern California today, tomorrow, and forever forward.
Sharp Rees-Stealy Medical Centers, a multi-specialty medical group located in San Diego	SHARP	The best place to start and support your journey to happiness.

Speakers & Planning Team

The CalHIVE BHI team, made up of members from the California Quality Collaborative (CQC) and the Collaborative Family Healthcare Association (CFHA), will be speaking and facilitating sessions throughout the day.

Read more about the speakers and facilitators in About the Speakers and Organizations (pages 15 - 18).

- ♦ CalHIVE BHI Team: Anna Baer, Daniela Vela Hernandez, Erika Lind, Kristina Mody, Mary Nickel-Nguy, Jose Ordonez, Peter Robertson, Brian Sandoval
- ♦ Other CQC team members: Anna Elgart

The Time and Timing

This convening will be on Tuesday, May 13th from 8 a.m. - 3:30 p.m. Breakfast and lunch will be provided.

The Place and Space

The convening is held in Long Beach, California at The Grand (4101 E Willow St, Long Beach, CA 90815)

Land Acknowledgement

We acknowledge that we are on the land of the Tongva/Gabrieleño who have lived and continue to live here. We honor and respect the Tongva Nation and their spiritual connection as the first stewards and the traditional caretakers of this land.

CalHIVE BHI – Collaborative Values

1. Collaboration around a common goal

2. Trust & transparency

3. Reflect, learn & revise

Meeting Materials
In addition to this meeting workbook, meeting materials (slides, worksheets and resource links) will be posted on the CalHIVE BHI website (available via this QR Code).

AGENDA

The Time	The Content & Facilitator	Achievement-Based Objectives
8:00 a.m. – 8:30 a.m.	**Breakfast**	
8:30 a.m. – 9:00 a.m.	**Welcome: Where We've Come, Where We're Going** ♦ Kristina Mody, Director, Practice Transformation (CQC)	♦ **Recognize** program accomplishments and values ♦ **Reflect** on time left in the program and collective opportunities
9:00 a.m. – 10:30 a.m.	**BHI Pilot Site: Bright Spot Sharing** ♦ Anna Baer, Program Coordinator, Practice Transformation (CQC) ♦ Daniela Vela Hernandez, Technical Assistance Associate (CFHA)	♦ **Present** successful BHI practices ♦ **Identify** practice for local implementation ♦ **Celebrate** cohort success
10:30 a.m. – 10:45 a.m.	**Systems Level Implementation** ♦ Kristina Mody, Director, Practice Transformation (PBGH/CQC)	♦ **Review** impact of system-level integration
10:45 a.m. – 10:55 a.m.	**Break**	
10:55 a.m. – 12:15 p.m.	**BHI Implementation – What Now?** ♦ Jose Ordonez, Data Manager (CQC) ♦ Brian Sandoval, Clinical Advisor (CFHA) ♦ Daniela Vela Hernandez, Technical Assistance Associate (CFHA)	♦ **Analyze** data trends from pilot site measures (process and financial) and site visit reports ♦ **Identify** improvement opportunities to strengthen BHI program

The Time	The Content & Facilitator	Achievement-Based Objectives
12:15 p.m. – 1:15 p.m.	**Lunch & Networking**	♦ **Vote** for CalHIVE BHI 2025 awards
1:15 p.m. – 2:15 p.m.	**Sustainability** ♦ Kristina Mody, Director, Practice Transformation (CQC) ♦ Brian Sandoval, Clinical Advisor (CFHA)	♦ **Conduct** SWOT analysis for BHI payment ♦ **Co-design** CalHIVE BHI sustainability plan
2:15 p.m. – 3:15 p.m.	**Behavioral Health Equity Improvement Plan (BHEIP): Small Tests of Change** ♦ Mary Nickel-Nguy, Senior Manager, BHI (CQC) ♦ Peter Robertson, Senior Director, Practice Transformation (PBGH/CQC)	♦ **Share** small tests of change supporting BHEIP ♦ **Gather and share** peer feedback to enhance and strengthen BHEIP
3:15 p.m. – 3:25 p.m.	**Reflections and Commitments: Looking Ahead to 2026** ♦ Daniela Vela Hernandez, Technical Assistance Associate (CFHA)	♦ **Document** action items ♦ **Commit** to next steps
3:25 p.m. – 3:30 p.m.	**Closing & Award Ceremony** ♦ Peter Robertson, Senior Director, Practice Transformation (PBGH/CQC)	♦ **Celebrate** cohort success

PARTICIPANT WORKBOOK

This workbook will help you and your team capture questions, lessons learned and action items collected during the convening.

Session: BHI Pilot Site: Bright Spot Sharing

Record learnings from each presentation below.

Organization *Topic*	Learnings and Questions
Chinese Hospital *Launching CoCM program internally*	
Community Memorial *Community health workers*	
Perlman Clinic *Virtual patient visits & leveraging patient portal*	

Organization *Topic*	Learnings and Questions
Pomona Valley Hospital Medical Center *Billing lessons learned*	
Riverside Family Physicians *Community engagement*	
SFHN *BHI workflows (with multiple disciplines)*	
Scripps *Provider engagement*	
Sharp *PHQ-9 Pre-Screening QI project*	

Session: Systems Level Implementation

Coordinated		Co-Located		Integrated	
Level 1 Minimal Collaboration	**Level 2** Basic Collaboration at a Distance	**Level 3** Basic Collaboration Onsite	**Level 4 Close** Collaboration Onsite with Some System Integration	**Level 5** Close Collaboration Approaching an Integrated Practice	**Level 6** Full Collaboration in a Transformed/ Merged Integration Practice

Source: SAMHSA

Session: BHI Implementation – What Now?
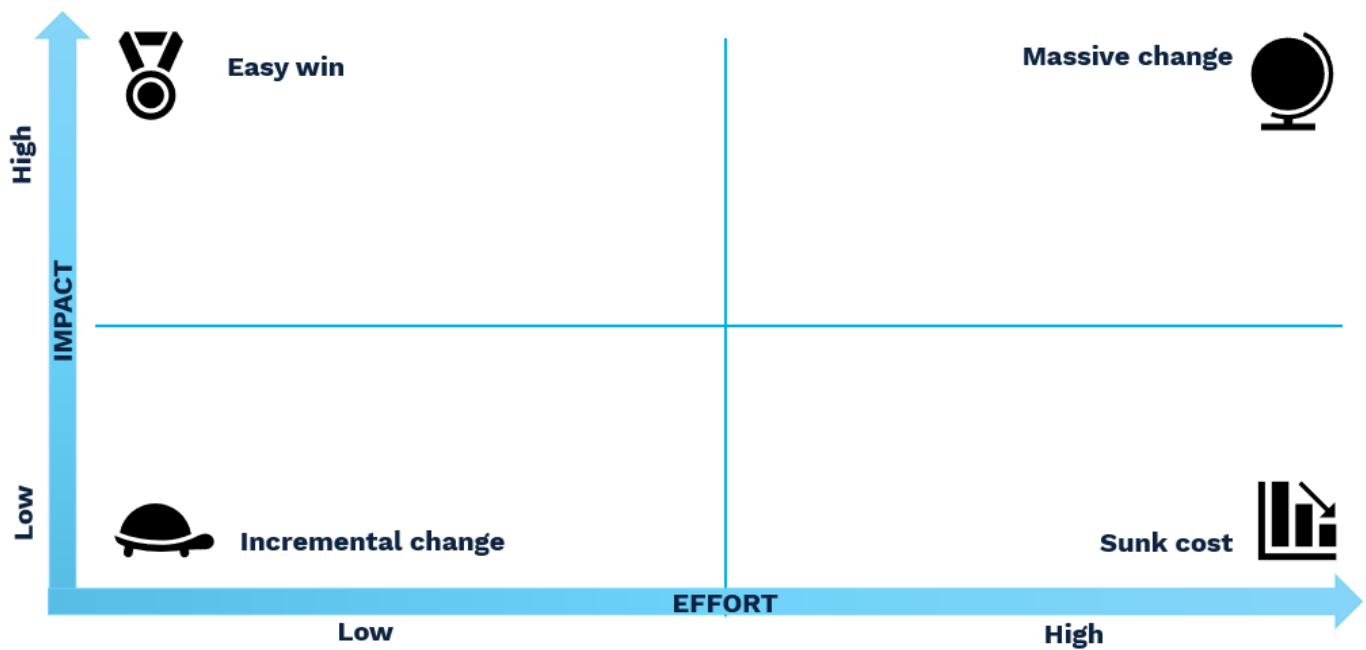
As a team, review your team Data Packet.

1. **Review Data** - Identify priority data points (1-2)

2. **Brainstorm** - Gather as many ideas as possible to improve data

3. **Cluster –** Group similar ideas to find themes

4. **Assess Feasibility** – Map priority solutions on prioritization matrix

5. Prioritize – Get team consensus on 1-2 feasible solutions

▶ **Try it – Post It App**
Free; scan notes and upload

Session: Sustainability

Definition: Ensuring gains are maintained beyond the life of the project

STRENGTHS	WEAKNESSES
What resources can we deploy? What are our advantages? What's working well?	*What abilities are we lacking? Where are we starting to struggle? How can we overcome these?*

OPPORTUNITIES	THREATS
Who might most value our strengths? What trends work in our favor? What prizes are within reach?	*What headwinds do we face? Who might challenge us? What could go wrong?*

Session: Behavioral Health Equity Improvement Plan: Small Tests of Change

- **I Like...** *Highlight specific strengths or achievements you appreciated during their planning stage.* Example: "I like how the team has clearly outlined the problem statement and engaged stakeholders early in the process."

- **I Wish...** *Provide constructive suggestions for areas of improvement.* Example: "I wish there was more focus on defining measurable outcomes for the PDSA cycle."

- **I Wonder...** *Pose thoughtful questions or suggestions to encourage forward-thinking and innovative ideas.* Example: "I wonder if incorporating patient feedback at this stage could further strengthen the intervention design.

What feedback did you hear on your team's PDSA?

What adjustments could your team make to enhance your PDSA?

Session: Reflections and Commitments - Looking Ahead to 2026

Record reflections and commitments below.

ABOUT THE SPEAKERS AND ORGANIZATIONS

California Quality Collaborative

calquality.org

The California Quality Collaborative (CQC), a health care improvement program of the Purchaser Business Group on Health (PBGH), is dedicated to helping ambulatory care teams gain the expertise, infrastructure and tools they need to advance care quality, be patient-centered, improve efficiency and thrive in today's rapidly changing environment.

The program is dedicated to advancing the quality and efficiency of the health care delivery system across all payers, and its multiple initiatives bring together providers, health plans, state and purchasers to align goals and take action to improve the value of health care for Californians.

Collaborative Family Healthcare Association

cfha.net

The Collaborative Family Healthcare Association (CFHA) is a multi-guild member association whose goal is to make integrated care the standard of care across the United States and beyond. For us, collaboration is not just a word in our name; it defines who we are, how we interact with each other and other organizations. We believe deeply that collaboration across professions is an essential element necessary for revisioning healthcare.

FACULTY BIOGRAPHIES

Peter Robertson
Senior Director, Practice Transformation
As Senior Director of Practice Transformation, Peter Robertson leads the California Quality Collaborative's (CQC) technical assistance programming. Most recently, Peter led the CalHIVE Network, a multi-year improvement collaborative that supported the expansion of virtual care tools for chronic disease management. Prior to his current role, Peter served as Director of Insights, Analytics and Data Management at PBGH. Previously, Peter led the quality measurement activities of the American Academy of Ophthalmology (AAO). This work included the development and maintenance of quality measures stewarded by the AAO and the implementation of a broad range of measures for federal quality reporting within the AAO's IRIS® Registry. Peter's background also includes experience developing clinical practice guidelines at the American Academy of Otolaryngology. Additionally, he worked for the regulatory body of the National Health Service in England and Wales, analyzing and reporting patient experience data. Peter earned a master's degree in Public Administration from Indiana University and a bachelor's degree in International Management from the University of Manchester.

Kristina Mody
Director, Practice Transformation

As Director of Practice Transformation with PBGH's California Quality Collaborative (CQC), Kristina Mody leads technical assistance design and delivery, working directly with delivery system partners to transform clinical practices, including behavioral health integration into primary care and chronic condition management using virtual care. In her role, she plans and implements programs ranging from multi-year improvement collaboratives to day-long trainings, leveraging adult learning principles as a [Certified Dialogue Education Practitioner](). She also serves as an improvement coach for participating health care delivery organizations and their improvement teams to support them as they advance toward high-value, patient-centered advanced primary care. Kristina brings a wealth of experience creating technical assistance that meets the needs of health care quality leaders, especially those working with underserved patient communities. Kristina earned her M.P.H. and B.A. in English and History from the University of California, Berkeley. In her free time, she enjoys reading, cooking, and exploring California's parks and beaches with her husband, two children and dog.

Mary Nickel-Nguy, DSW
Senior Manager, Behavioral Health Integration

As PBGH's Senior Manager, Behavioral Health Integration with the PBGH's California Quality Collaborative (CQC), Dr. Mary Nickel-Nguy leads CalHIVE Behavioral Health Integration Improvement Collaborative improvement advising. She oversees the implementation of behavioral health integration strategy and provides technical assistance. She also serves as an improvement coach for participating health care delivery organizations and their improvement teams to support them as they advance toward high-value, patient-centered and equitable advanced primary care. Mary comes to PBGH with diverse clinical and program operations experience. She is a licensed clinical social worker and has experience in private practice, medical and behavioral health systems, health plans and higher education. Previously, she served as Principal Clinical Program Manager at Blue Shield of California (BSC), leading behavioral health roadmaps, strategy and implementation for the Accountable Care Organization department, with a focus on value-based programs. Mary earned a Doctorate in social work from the University of Pennsylvania, a Master of Science in social work from Columbia University and a Bachelor of Arts in social work from California State University of Sacramento.

Jose Ordonez
Manager, Data Analytics

As Manager of Data Analytics for PBGH's California Quality Collaborative (CQC), Jose Ordonez leads the infrastructure of data collection, validation, and analysis of clinical, process and utilization performance measures within CQC's technical assistance programming. In his role, Jose leverages health equity, demographic and payer data to identify health disparities and inequities across participating provider organizations' patients. He also provides technical assistance to participating health care delivery organizations on data reporting and visualization and supports in making more data driven decisions. Previous to his current role, Jose served as Data Analyst for CQC's CalHIVE Network, a multi-year quality improvement collaborative, where he managed the data collection, validation and analysis for a set of chronic condition management, utilization and depression screening performance measures. Prior to joining PBGH, he interned at 10,000 Degrees, where he assisted with data entry, management and analysis for the College Success Program while he was an undergraduate. He also served as a research assistant on a project where he assisted in the data collection on measures around food waste reduction, school lunch participation and consumption of fruits and vegetables. Jose received a Bachelor of Science in Nutritional Science with a concentration in Physiology and Metabolism from the University of California at Berkeley.

Erika Lind
Manager, Care Transformation Events and Learning

As Manager of CQC Events and Learning, Erika Lind is responsible for implementing the systems and processes that underpin PBGH's Care Transformation programs, events and learning. She leads and executes in-person and virtual event planning and production, serves as an advisor to team members in creating engaging learning programs and manages the design and production of virtual improvement collaborative learning events. Erika previously served as Associate Project Manager for PBGH's Care Transformation team. Before joining PBGH, she worked in the entertainment industry as a Production Assistant and Product Placement Coordinator, where she organized deadlines for production schedules, maintained budget trackers for set coordinators and acted as a liaison between luxury brands and production companies. Erika received a Bachelor of Arts in Communication with certificates in Health and Wellness and Personal Training from the University of California, Santa Barbara.

Anna Baer
Program Coordinator

As Program Coordinator, Anna Baer works with the Practice Transformation team to provide logistics, event and administrative support. Prior to joining PBGH, Anna worked in digital health software and social services. She has led software improvement projects focused on increasing patient access to maternal health resources and served as a peer-to-peer coach, guiding child welfare case workers through a standardized practice model. Anna holds a Master of International Development degree from the University of Pittsburgh's Graduate School of Public and International Affairs.

Daniela Vela Hernandez, LMFT
Technical Assistance Associate

Daniela Vela Hernandez, LMFT is part of the Collaborative Family Healthcare Association's Technical Assistance team as a Technical Assistance Associate and supports clinics with behavioral health integration implementation and workflow optimization. Prior to joining the CFHA team, Daniela developed a strong clinical background and experience in multiple settings from community mental health clinics to startup behavioral health. She is passionate about making mental health services accessible to all and is able to use her knowledge of traditional mental health services and integrated behavioral health to support the growth and implementation of integrated care. Daniela grew up in San Diego, but now resides in little-known Imperial, CA with her husband, two children, and two pups. When not supporting the CFHA mission, Daniela is out rooting for her kiddos on the field.

Brian Sandoval, PsyD
Clinical Advisor

Dr. Brian Sandoval is a psychologist with more than a decade of experience spearheading efforts to integrate behavioral, medical, and social care services. Dr. Sandoval's career spans various capacities, including program design, policy development, payment reform, clinical training, and direct patient care. Currently, he is Executive Director, Behavioral Health (South Division) at Providence. Prior to his current role, Dr. Sandoval spent eight years at a community health center, designing and implementing an exemplary behavioral health program across two states. He co-chairs CFHA's Value-Based Care Committee and has served on several state committees to align policy, payment, and clinical care delivery. He continues to work nationally as an independent consultant and subject matter expert in behavioral health integration. Dr. Sandoval and his family currently reside in the Phoenix, AZ metro area.

ATTENDANCE ROSTER

As of 5/1/25

Name	Email	Job Title
Chinese Hospital		
Kaier Guan	kaierg@chasf.org	Clinic Care Coordinator
Scott Huang, DO	scotth@chasf.org	Medical Director
Ruby Li	rubyl@chasf.org	Clinic Operation Coordinator
Jiami Wu, MPH	jiamiw@chasf.org	Director of Clinics
Rain Zhang	yingz@chasf.org	Clinic Supervisor
Community Memorial Health Services		
Janice Aharon-Ezer	jaharonezer@cmhshealth.org	Behavioral Health Clinical Specialist
Maureen Hodge, LCSW	mhodge@cmhshealth.org	Director of Ambulatory Behavioral Health
Perlman Clinic		
Lauren MacGregor	lmacgregor@perlmanclinic.com	Operations Manager
Mike Rufo	mrufo@health.ucsd.edu	Director of Physician Network
Pomona Valley Hospital Medical Center		
Dan Blocker, PhD, LMFT	Daniel.blocker@pvhmc.org	Director of Behavioral Health
Darlene McPherson	Darlene.mcpherson@pvhmc.org	Director, Operations
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Scripps Health		
Denise Coyle, MD	coyle.denise@scrippshealth.org	Family Medicine Physician
Vicki Diamond	Diamond.victoria@scrippshealth.org	Director, Population Health
Gurinder Dabhia, MD	Dabhia.gurinder@scrippshealth.org	Pediatrician - MD

Name	Email	Job Title
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Sharp Rees – Stealy Medical Centers		
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Aasif Parekh	Aasif.Parekh@sharp.com	Project Coordinator
California Quality Collaborative		
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Erika Lind	elind@pbgh.org	Manager, Care Transformation Events and Learning
Kristina Mody	kmody@pbgh.org	Director, Practice Transformation
Mary Nickel-Nguy, LCSW	mnickelnguy@pbgh.org	Senior Manager, Behavioral Health Integration
Jose Ordonez	jordonez@pbgh.org	Manager, Data Analytics
Peter Robertson	probertson@pbgh.org	Senior Director, Practice Transformation
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Brian Sandoval, PsyD		Clinical Advisor
Guests		
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Muriel LaMois	Muriel.lamois@blueshieldca.com	Program Manager, Industry Initiatives – Blue Shield of California