



Annual Report

2023



CARE CLOSE TO HOME



A WORD FROM THE CHIEF EXECUTIVE OFFICER

In the pages ahead, we share many of the accomplishments that took place throughout 2023. In total, Southwest Health System cares for more than half of the residents in Montezuma County through our hospital and clinics. The choice each person makes to receive care through one of our services provides the financial resources to sustain and improve healthcare delivery in our region. As you read this year's report, reflect on the variety of services you can obtain close to home at Southwest Health System (SHS).

The past year has also highlighted the challenges of sustaining rural hospitals and health care nationwide. This came to light when discussions about pausing labor and delivery took place mid-year. We are proud to see the services remain available at SHS. This is not the case in all communities. In the past ten years more than 200 hospitals have ceased labor and delivery services and over half of rural hospitals (55%) in our country do not offer labor and delivery today. SHS is doing its part to sustain this and other services needed in the community. We have recruited physicians to expand access to care for expecting mothers and their families. You can read more about our recruiting efforts in this annual report. Also, look for more information throughout 2024 as providers join our community.

Finally, caring for people in our community would not be possible without the talented and committed staff at SHS. From our housekeeping staff to physicians, each person plays a pivotal role. When you see one of our staff doing something great, consider recognizing their work through our [Caught in The Act](#) recognition program.

Thank you for taking the time to learn more about our accomplishments in 2023 and the services we provide to you throughout the year.

JOE THEINE

Chief Executive Officer



HOW WE CARE FOR THE COMMUNITY

SHS Mission

Our mission is to provide the highest quality health care to our community by bringing excellence, value, and service together to promote, improve and restore health



Locations

Southwest Memorial Hospital

- Emergency Department

Southwest Medical Group

- Medical Office Building
- Mancos Valley Clinic
- Walk-In Care
- School-Based Health Clinic - Montezuma-Cortez High School

Southwest Memorial EMS Training Center



Services

SHS operates

- Southwest Memorial Hospital (SWMH)
 - Cardiopulmonary & Respiratory Therapy
 - Diagnostic Imaging
 - Family Birthing Center
 - Infusion
 - Inpatient Intensive Care
 - Inpatient Medical & Surgical
 - Laboratory
 - Patient Education – Diabetic Education & Nutrition
 - Rehabilitation Services
 - Sleep Center
 - Same Day & Surgical Services
- Southwest Medical Group (SMG)
 - General Surgery
 - Orthopedics & Orthopedic Surgery
 - Podiatry & Podiatric Surgery
 - Primary Care – Family Medicine, Internal Medicine, Pediatrics, Pain Management
 - School-Based Health Center
 - Sleep Center
 - Visiting Physicians – Interventional Spine Care and Cardiology
 - Women's Health
 - Wound Care

SHS Vision

We envision a health system in which all providers work together to make excellent, patient-centered health services available in our community.



Our Hospital Boards

Southwest Health System (SHS) is a community hospital with local Board Members.

The community benefits by having both boards working closely together to sustain and improve healthcare delivery.



OUTREACH AND INTERNAL COMMUNICATIONS



Community Outreach

SHS strives to support the community. SHS sponsors and attends numerous community events, businesses, and initiatives throughout the year:


- Ute Mountain Roundup Rodeo and Montezuma County Fair
- Four Corners Child Advocacy Gala
- High School and Youth League Athletic Programs
- Organized walks, 5k's, bike races, golf tournaments
- Escalante Days, Mancos Days, Farmers Markets
- High School Futures Fair
- Stand Down for Veterans
- Community Trick-or-Treating
- Multiple Secondary & Post Secondary Career Fairs



SHS Insights

To maintain open communication among all SHS employees, the SHS Insights newsletter was established. This biweekly publication includes news and updates on SHS, employees, services, and the community. SHS Insights is distributed to all SHS employees every other Wednesday.


NOVEMBER 15, 2023



BI-WEEKLY UPDATE

SHS INSIGHTS

OPEN ENROLLMENT Open enrollment is NOW. November 13th thru November 30th. Travis Parker and Amanda Baker have sent emails with information. <small>Please see page 2 for details.</small>	THANKSGIVING MEAL TODAY, Wednesday, November 15th, enjoy a Thanksgiving Meal prepared by Food and Nutrition. FREE for all SHS staff.	HOLIDAY PARTY! Holiday Party Pot Luck on December 20th! Celebrate the holidays and the end of the year with fun, food, and the gathering of the SHS family. <small>Please see page 3 for details.</small>
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UPDATES FROM JOE

This issue of SHS Insights gives us an opportunity to pause and share gratitude for one another as we approach the Thanksgiving Holiday. Two weeks ago, we welcomed Amy Steinbinder to learn from many of our caregivers and I'm looking forward to receiving the feedback you have shared through Amy in the coming weeks. Last week we completed our recertification survey with DNV. I wish each of you could have been present for our debrief with DNV. The surveyors commented on how great their interactions were with our staff and how fortunate we are to have a hospital providing the breadth of services we do in a community of our size. They shared what high-quality care they witnessed being provided. Thank you for the care you provide every

EMPLOYEE FORUM

- 2nd week of each month the Senior Leadership Team will post a pre-recorded video message that will be distributed via e-mail, as well as posted on our intranet website.
- 4th Wednesday of the



AWARDS AND RECOGNITIONS



In 2023, Southwest Memorial Hospital received the Chartis Performance Award for exceptional outcomes. Our quality report, covering factors like mortality rate, safety of care, hospital readmission rate, and care timeliness, demonstrates that our quality performance surpasses other critical access care hospitals in Colorado by a remarkable 52%.



DNV Regulatory Certification for ISO compliance and Critical Access Hospital 3-year reaccreditation

Noteworthy achievements during the survey:

- Leadership
- Customer focus
- SHS offers a greater number of services than many Critical Access Hospitals in similar size communities.

Certificate of Excellence-Colorado Rural Healthcare Center

- Recognized for excellence in Quality and patient care measures.

Colorado Hospital Transformation Project

- All milestones are met with quarterly reporting and all available at-risk dollars earned

Quality Reporting Measures

- Improvement on Sepsis Management Bundle since 2022
- 25% improvement in Exclusive Breast Milk Feeding in Term Newborns since 2022
- Have not had hospital-acquired infections, pressure ulcers, or venous thromboembolism.
- SHS median admit decision time to ED departure time for admitted patients average is 55 minutes while the national average is 120 minutes

BEST OF CORTEZ/MONTEZUMA COUNTY 2023

Congratulations to our outstanding providers and services that were recognized as being the Best of Cortez and Montezuma County!

1st place for Best Pharmacy

1st place for Best Physician - Dr. Schmitt

2nd place for Best Physical Therapy

2nd place for Best Podiatrist - Dr. Carelock



OUTSTANDING PHARMACY

Retail Pharmacy

In 2023, the Retail Pharmacy of Southwest Health System reached its highest point, filling an estimated over 67,000 prescriptions by the end of the year. In the preceding year of 2022, they filled 52,887 prescriptions. Additionally, by the end of 2023, the pharmacy had administered over 40,000 vaccines, contributing to the overall number of vaccines given at the retail pharmacy since January 1, 2018.

Financially, the retail pharmacy is thriving. In 2023, the pharmacy exceeded \$5,000,000 through insurance claims surpassing the \$2,873,360.84 they generated in 2022.



The chart to the left shows the total number of prescriptions that were filled for the Financial Assistance plan for Colorado Indigent Care Program patients in 2023 and 2022.

Notable records in 2023:

- Record fill day was 476 prescriptions filled
- Record fill week was 1801 prescriptions filled
- Record fill month was 7459 prescriptions filled



Inpatient Pharmacy

Southwest Health System's Inpatient Pharmacy wrapped up 2023 with a significant milestone in gross sales, hitting approximately \$15,500,000 in billed medications. During the year, the pharmacy team spent three months improving medication prices, costs, and coding to increase insurance reimbursement. Despite encountering manufacturer-related drug shortages, they still accomplished remarkable outcomes. The total number of doses administered in 2022 was 244,172, and an estimated 256,302 doses were projected to be administered by the end of 2023.

The pharmacy monitors opioid usage within the hospital. Patients typically use 18.30 MME per day among 449 patients. There have been 10 cases exceeding 90 MME and 32 surpassing 60 MME, leading to pharmacy interventions and discussions during daily rounds.



RECRUITMENT AND RETENTION

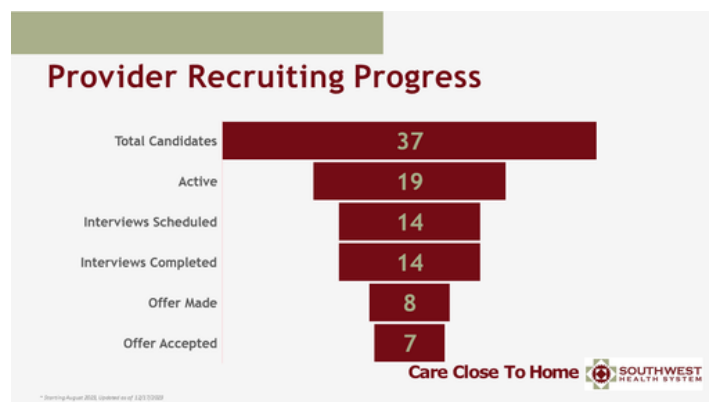
Recruitment

In 2023, Southwest Health System directed its efforts towards recruitment. The provider recruitment initiative took off in July with the establishment of a Retention and Recruitment Task Force. Dr. Jennifer Gero, SMG Medical Director, leads the task force, which convenes monthly to enhance the retention and recruitment of our provider community.

The Retention and Recruitment Task Force collaborated closely to develop a seamless recruitment process and network. They implemented an interview procedure that involves pre-screening phone calls, a tailored interview schedule for each candidate, hands-on engagement with current SHS providers, staff, stakeholders, and the community, as well as post-interview follow-ups.

Recruitment Numbers

Recruitment activities commenced in August 2023. Over a period of five months, SHS implemented significant strategies and adjustments to draw new providers to the region. The data on the right illustrates the total number of candidates we engaged with from August to December. While not all candidates were suitable, those who visited our site, and half of them proceeded to sign a letter of intent.



Provider Highlights Following In-Person Interviews

"We had a great time and really couldn't have asked for a better introduction"

"You all made a fantastic impression. I love the passion everyone shows for their work and the community. It really resonated with me and I'm excited to be joining."

"We absolutely loved meeting everyone." "We can tell what a special community of people you all are and we feel grateful to be interviewing here."

"We are so excited to join you all."

"We feel incredibly lucky to be able to join you and the other amazing physicians in Cortez."

"Excited to join a great team."



RECRUITMENT AND RETENTION

Retention

In 2023, Southwest Health System initiated efforts to enhance provider and staff retention, particularly within Southwest Medical Group. These enhancements consist of:

- Implemented MA education to enhance provider assistance in the clinic.
- Established the SHS Stars program
 - The SHS Stars program was created by the Provider Leadership Council (PLC) to enable providers to promptly acknowledge staff by presenting them with gift cards. The aim of this reward initiative is to cultivate positive interactions between providers and staff, promoting a sense of value and support among the staff. Every month, full-time providers have the opportunity to receive either a \$10 Starbucks gift card or a \$10 SHS cafeteria gift card through a rotating system.



SHS 2023 FINANCIALS

Revenue

What We Billed Insurance or Patients (Gross Revenue)

Inpatient	\$22,334,259
Outpatient	\$130,300,022
Total Gross Revenue	\$152,634,281

What was billed but did not receive payment For (Contractuals and Discounts)

Government Programs Discounts	\$56,642,237
Managed Medicare Discounts	\$16,585,864
Commercial Insurance Discounts	\$7,355,153
Charity & Indigent Discounts	\$7,706,638
Other Discounts	\$5,320,605
Chase	(12,027,087)
Total Discounts	\$81,583,410

**Total Net Patient Revenue
(Gross Revenue - Discounts)** \$71,050,871

Additional Sources of Non Operating Income

Other Revenue	\$6,338,527
Non Operating Income	\$112,995
Sales Tax MCHD	\$2,147,305

**Total Additional
Revenue** \$8,598,827

Net Revenue

(Total Net Patient Revenue + Total Additional revenue) **\$79,649,698**

Expenses

Operational Spend

Employee Pay and Benefits	\$46,307,108
Medical Supplies, Drugs and Other Supplies	\$13,370,406
Building and Equipment Costs: utilities, R&M, maintenance contracts, etc.	\$4,378,500
Purchase Services	\$4,286,594
Other Expense	\$5,328,728

Total Operating Expense \$73,671,336

Reinvestment in Facility and Equipment

Bond Debt Repay (P&I)	\$2,874,017
Line of Credit Equipment (P&I)	\$1,093,845
Capital Equipment Purchases	\$695,410
Added Capital Improvement Fund	\$1,015,892
Total Reinvestment Expense	\$5,679,164

**Total Operating Expense +
Reinvestment in Facility &
Equipment** **\$79,350,500**

Net Income

Funds available for reinvestment into our services and growth

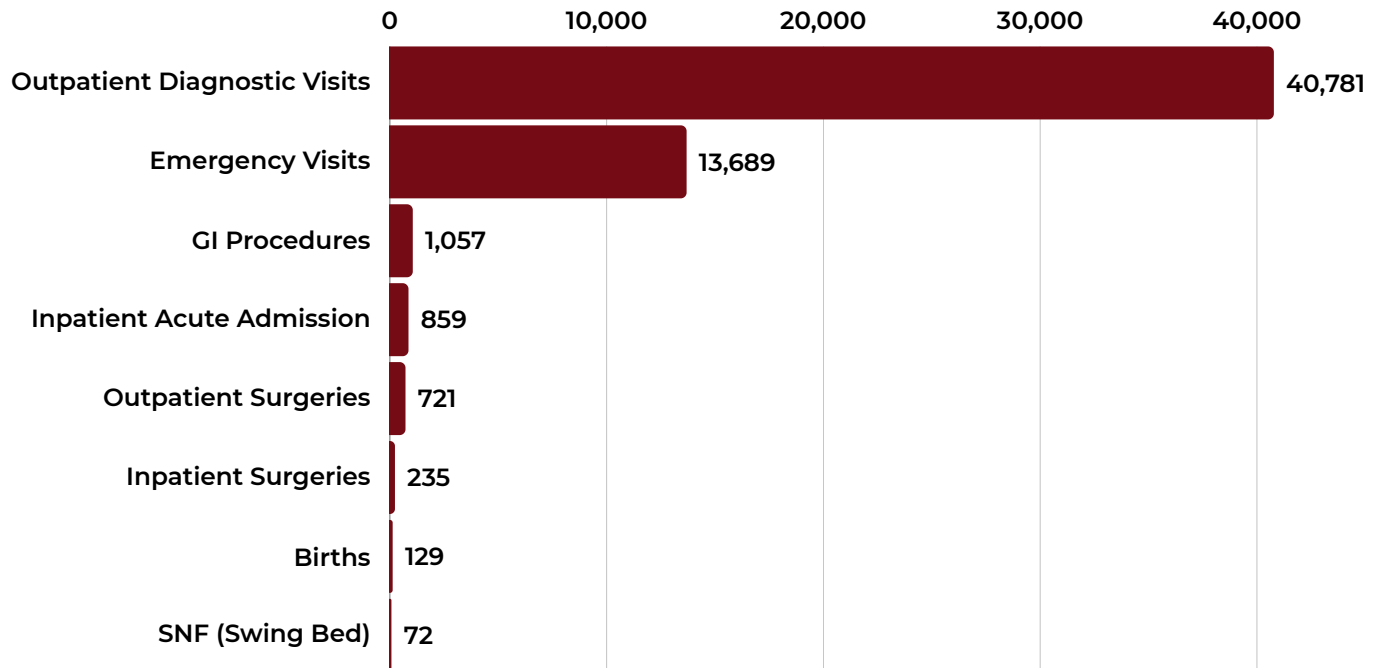
\$299,198



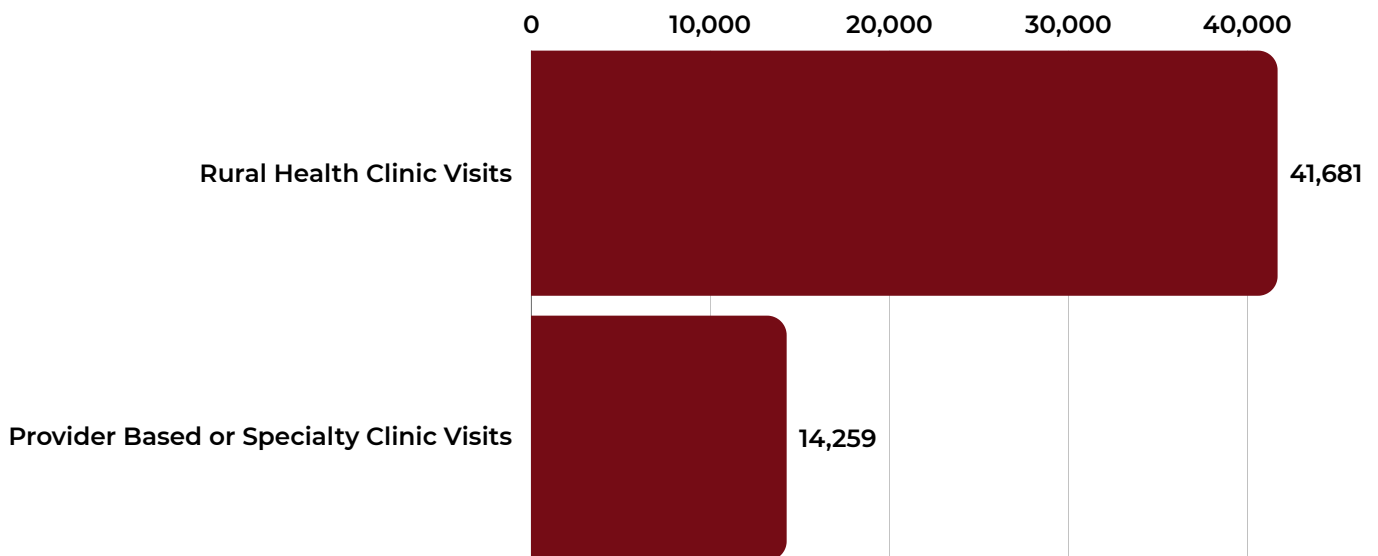


SHS 2023 VISIT VOLUMES

Southwest Memorial Hospital



Southwest Medical Group





GOVERNING BOARD UPDATES

The Montezuma County Hospital District (MCHD) and the Southwest Health System, Inc. (SHS) Boards collaborate to deliver healthcare services to the community. This partnership benefits the community in various ways:

- Funding is provided for necessary expansion projects at the most affordable rates.
- The hospital is operated as a not-for-profit enterprise.
- Taxes collected by MCHD are used to improve healthcare delivery in our community.
- MCHD, as a governmental agency, and SHS, as a not-for-profit corporation, have access to grants and funding that would otherwise be unavailable, increasing the likelihood of securing healthcare funds.
- By working together both organizations help keep healthcare delivery decisions local and focus limited resources on the needs of our community.

2023 SHS Board Updates

- The SHS Board updated the nominating policy and filled vacant seats.
- Additional information was added to the SHS website, including meeting agendas, governing documents, and financial information.
- Hired a permanent CEO, Joe Theine.
- Together with the MCHD Board, restructured some of the long-term debt, creating a capital improvement fund.

2023 Southwest Memorial Hospital Foundation Board

- In 2023, the foundation board hosted two fundraising events that generated more than \$37,324.37. The funds from the two fundraisers in 2023 will be utilized by Southwest Health System to acquire a Fiberoptic Endoscopic Evaluation of Swallowing (FEES) for the hospital's Speech-Language Pathology services.



SOUTHWEST MEMORIAL HOSPITAL FOUNDATION

Southwest Memorial
Hospital
Foundation



The Southwest Memorial Hospital Foundation aims to back Southwest Health System, Inc. in delivering top-notch, easily accessible healthcare to Montezuma County residents and neighboring regions. Additionally, it strives to aid in the recruitment and retention of medical professionals, acquire new equipment and furnishings, maintain effective and efficient emergency care, and offer other services in collaboration with the hospital.



In 2023, the foundation focused on understanding the needs and departments of Southwest Health System (SHS). Initiatives were developed by the foundation board to start fundraising for capital equipment for various service lines at SHS. Additionally, ongoing support was provided for the Montelores Cancer Grant, assisting community members with expenses beyond cancer treatment.

In December, a fundraising campaign was launched by the Foundation to acquire a Fiberoptic Endoscopic Evaluation of Swallowing (FEES) for the hospital's Speech-Language Pathology services, raising \$28,789 for this purpose.

In total, the foundation raised \$37,324.37 from two fundraisers and anonymous donors in 2023.



By 2024, the foundation aims to establish a fully operational and staffed board. Presently, the current board members are actively seeking new additions to the board.

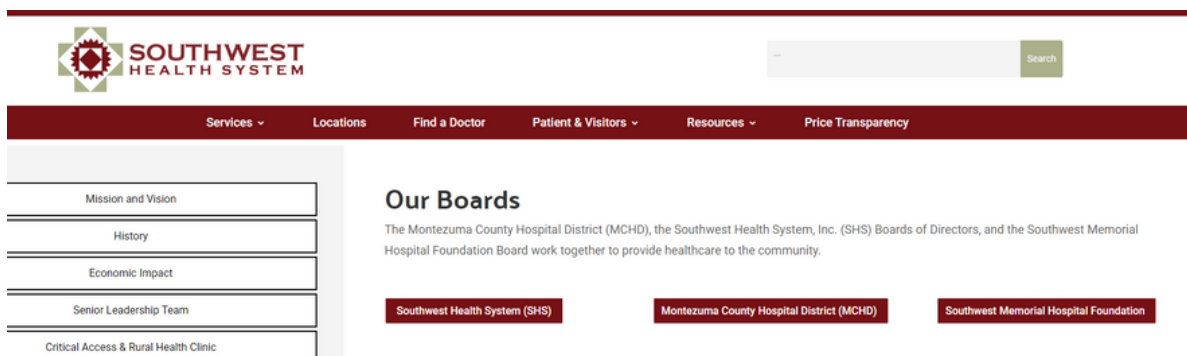
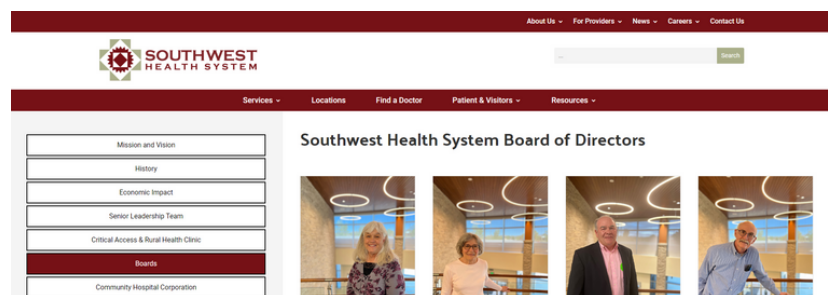
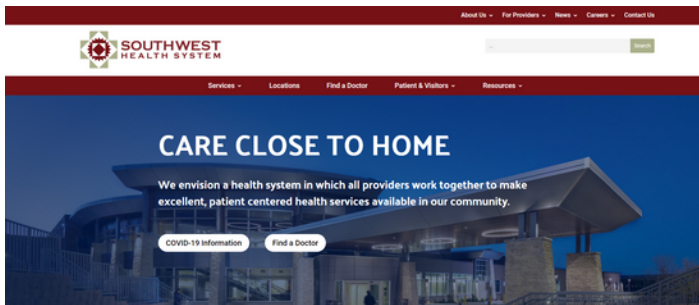


WEBSITE UPDATES

In 2022, the Southwest Health System website underwent a redesign to enhance user-friendliness and provide up-to-date information. The website is updated regularly. Look to our website for updates throughout the year.

In 2023, the Southwest Health System Board of Directors (SHS Board) enhanced its website to increase available information within the updated webpage. The revised webpage now features:

- Meeting minutes and agendas
- Articles on incorporation
- Bylaws
- Key financial indicators
- Schedule of debt payments
- Audited financial statements
- Contact form for communicating with the board



Contact the Board

Because we are unable to offer any medical advice, we ask that you do not submit medical questions or concerns about particular health conditions. Please contact your medical provider directly for medical advice.

Name
Email Address
Message

SUBMIT

Southwest Health System Reports

Here you will find reports and information from the Southwest Health System and SHS Board meetings.

Agendas Approved Minutes of Board Meetings SHS Organization Documents

Articles of Incorporation

Bylaws

Form 990

SHS Financial Data and KPI's

Key Financial Indicators Schedule of Debt Payments Audited Financial Statements

2022 and 2023



SHS EMPLOYEE RECOGNITION PROGRAM

Southwest Health System values the efforts of every SHS Employee, acknowledging those who go the extra mile to uphold the SHS mission of delivering top-tier healthcare to the community. All SHS Employees, including Staff, Physicians, and Contract Employees, are eligible for recognition. Monthly, the Employee Recognition committee reviews "Caught in the Act" submissions to select an Employee of the Month, and quarterly, a Leader of the Quarter is chosen. The recipients are honored each month and quarter. At year-end, an Employee of the Year is picked from the Employee of the Month and Leader of the Quarter pool. Each recognized employee through "Caught in the Act" receives \$10, and SHS staff receive an email with the nomination details.

CONGRATULATIONS SHS EMPLOYEE OF THE YEAR 2023!



Brenton Wright,

Southwest Health System's Director of Rehab Services






SHS EMPLOYEE RECOGNITION PROGRAM

LEADERS OF THE QUARTERS IN 2023

Leader of the Quarter
1st Quarter 2023
Thank you for your hard work.
You are an Inspiration.



Wendy Lindsay,
Cardiopulmonary Supervisor

Leader of the Quarter
2nd Quarter - 2023
Thank you for your hard work.
You are an Inspiration.



Jamie Hightower,
Infusion Coordinator

Leader of the Quarter
3rd Quarter - 2023
Thank you for your hard work.
You are an Inspiration.



Brenton Wright
Director of Rehab Services

Leader of the Quarter
4th Quarter - 2023
Thank you for your hard work.
You are an Inspiration.



Rebecca Green
Executive Chef in the Food & Nutrition Department

EMPLOYEES OF THE MONTH IN 2023

Employee of the Month
January 2023



Andrea Tabor of the Southwest Medical Group's Menace Valley Health Center

<https://www.southwesthealth.org/employees/>

Employee of the Month
February 2023



Laura Pultronek of the Southwest Health System's Retail Pharmacy

<https://www.southwesthealth.org/employees/>

Employee of the Month
April 2023



Nikole Young of the Southwest Health System's Family Birthing Center

<https://www.southwesthealth.org/employees/>

Employee of the Month
May 2023



Jenny Huettli, Diabetic/Diabetes Specialist, Southwest Health System's Patient Education Department

<https://www.southwesthealth.org/employees/>

Employee of the Month
June 2023



Amelie Crane, RN of the Southwest Health System's Urgent Services/Med/Surg Department

<https://www.southwesthealth.org/employees/>

Employee of the Month
July 2023



Cassandra Roggenbach, Secretary for Southwest Health System's Diagnostic Imaging Department

<https://www.southwesthealth.org/employees/>

Employee of the Month
August 2023



Karen Singel, PhD
Nurse Practitioner for Southwest Health System's Menace Valley Health Clinic

<https://www.southwesthealth.org/employees/>

Employee of the Month
September 2023



Theresa Herrera, Billing Center
Southwest Health System's Patient Financial Services (PFS) Department

<https://www.southwesthealth.org/employees/>

Employee of the Month
November 2023



Morgan Winslow
Registered Nurse in the Southwest Health System's Family Birthing Center

<https://www.southwesthealth.org/employees/>

Employee of the Month
December 2023



Kellie Penzance
Registered Nurse in the Southwest Health System's Med/Surg Department

<https://www.southwesthealth.org/employees/>



PATIENT TESTIMONIALS

EMERGENCY DEPARTMENT

The doctor, nurse, lab, and x-ray people were all excellent in providing me with care. I am happy to have this excellent center close by. Thank you.

My nurse Kati was awesome, took really good care of me, and was very attentive, she did an awesome job with the blood draw, the best blood draw I've ever had in the ER, Dr Asche was great and made sure I had the proper meds to get me through the rest of the evening until I could go pick up my prescription.

SAME DAY SURGERY

Everyone was exceptional, I couldn't be in better care. I would recommend Southwest Hospital to anyone needing care. They treat you like family. I'm very pleased with the care from all the staff. Thank you for making me comfortable.

I just wanted to say the service was outstanding in every aspect from the time I entered till the time I left. The staff is very caring. I enjoyed everyone there and I trusted everyone completely. The way they handled it and talked to me I felt very happy and came out with flying colors. I'm so happy. I would recommend them to anyone. Everybody was very great from Dr. Bagley all the way down to the nurses. I love the anesthesia Eric and yeah, you know I was happy to be there getting what I needed done and it seems to have come out well.

INPATIENT - MED/SURG & ICU

Thank you from the bottom of my heart for your compassion and care! Not only for my grandpa but for my whole family.

You know you're amazing right?!? Awesome! Terrific! Did we say amazing? Thank you for all the love, care, and knowledge you have shared and shown. Everyone was amazing and we just want to let you know how much you are appreciated.

SMG WOMEN'S HEALTH

Dr. Schmitt was fantastic and made me feel very comfortable talking about difficult subjects. She was understanding, empathetic, and very knowledgeable. We are lucky to have her in Montezuma County!

Loved all the staff at Southwest Health, super nice and saw everyone in a timely manner, and loved that I was able to get a portable ultrasound to see the baby and hear the heart beat.

SMG SLEEP MEDICINE

Carly and ALL the staff are phenomenal. Things flow with such ease and grace. Appointments are easy to get for both myself and my son. I feel safe coming there and cared about. And I trust, which is very unusual for me to say. Thank you so much!!!

Carly Temple is an excellent medical provider. Also, her nurse was very friendly and helpful. My family and I always have a stellar experience with Carly and her office.



PATIENT TESTIMONIALS

SMG PRIMARY CARE

The staff was very kind and quick! I hadn't finished my new patient paperwork before being called back! Everyone was so friendly and I had many questions as a first-time mom! Andrew Henrichs was very thorough answered all my questions and provided me with good information and feedback as to what I could do moving forward! Definitely will tell my friends about my experience!

This doctor was very good at working with both my husband and myself. He wrote down many things that we needed to do and that helped so much we will be following his suggestions when we get back home and we want to thank him for everything. He was quick, accurate, and very very precise.

SMG SPECIALTY CARE

Dr. Jones was great with my son. He has an awesome bedside manner and really connects with the kids. We really appreciate him.

Dr. Matteson was very thorough, very good at listening, very informative, and very respectful. I was especially impressed that he went over the Consent Form thoroughly. I don't think I've ever had a provider be so thorough about discussing risks and alternatives before.

SMG MANCOS VALLEY CLINIC

Karen is a compassionate and understanding provider. She was very helpful during a difficult time for me.

Karen is a great listener. This was the most interactive medical consultation that I've ever had with a Western medicine approach.

SMG WALK-IN CARE

The service I got was excellent. The receptionist was great. The young lady who waited on me was very nice and the doctor was very nice. And I would recommend you guys to anybody. I had an excellent experience here and I was treated very well.

I have been to your clinic twice. I am from out of town, come from Texas, and I have always been very pleased with the care there and I really appreciate them seeing me in a timely manner. Thank you very much.



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