

**INVESTIGATION REPORT:
INCIDENTS, FINDINGS, AND REMEDIES
*MARCH 10, 2023***

**CONDUCTED BY:
LANDMARK RECOVERY,
DBA PRAXIS OF FORT WAYNE**

**PRESENTED TO:
CITY OF BLUFFTON**



TABLE OF CONTENTS

Purpose • 3

History • 3

Why Bluffton • 3

Investigation

 Facility • 5

 Staffing • 6

 Enhancement to Training • 7

Timeline & Accountability • 8

Conclusion • 9

PURPOSE

This report is an agreed upon deliverable to between the City of Bluffton and Landmark Recovery and serves as an outcome of a Council Chamber meeting on February 21, 2023.

The purpose of this document is to identify and define the operational gaps present at this Landmark facility and to propose and execute remediation plans so that Landmark can best be able to make a positive impact by providing quality substance use disorder treatment to a community in need.

We hope this will be the start to being a collaborative organization that listens and responds to our community partners so that we can be a trusted resource in the community.

HISTORY

In December 21, 2021, Praxis of Fort Wayne opened its doors to provide addiction treatment for the Medicaid population.

WHY BLUFFTON?

Landmark Recovery began providing addiction services in the state of Indiana in July 2019, in Carmel, IN, a suburban community outside of Indianapolis. We opened as substance use disorder provider for individuals with commercial insurance plans or those who could self-fund treatment.

We quickly found that there was a high need for Medicaid beds and a gap in this service type for this vulnerable population. In response, we converted our Carmel location on October 6, 2020 to provide these important and much need services to individuals with Medicaid.

This facility is able to provide services to 48 individuals at a time and quickly the demand outgrew what we were able to provide. In addition, based on the data obtained from our admissions calls, we found that the need for services was not limited to Indianapolis or the surrounding counties, but that there was a huge need in the state for these services, including in the Fort Wayne area.

We chose Bluffton for a variety of reasons, but one of the most important is that the community clearly shared the same welcoming values that aligned with our values as a family owned business.

SITUATIONAL ANALYSIS

Much like the community of Bluffton, our philosophy has always been to welcome our consumers, with all their flaws and help them learn how to change and begin living a life worth living.

Today, we find ourselves much in the same position as our consumers. We have made mistakes and we have damaged the trust and safety of this community trusted us to contribute to. We would like to thank you for being honest and free in your feedback, specifically, we are speaking to the community members impacted.

We appreciate your compassion for the individuals we serve, your community at large, and being brave to share openly so we can make changes.

OUR PLAN

Immediately following the Council Chamber meeting on February 21, 2023, our team began an investigation into the root cause of the issues that are impacting your community to find opportunities for improvements to our processes so that we can rebuild trust with the Bluffton community and continue to improve the services we provide.

Landmark Recovery strives to provide the highest quality services possible and it is disappointing that we did not hit that mark and we can do better.

As stated, we conducted a full investigation into the operations at this location. Investigative efforts engaged our internal teams including, but not limited to:

- Quality Assurance
- Medical and Clinical Operations
- Property Management
- Human Resources
- Implementation

ED Contact:

Drew Mack, 317-294-6599, drew.mack@landmarkrecovery.com

COMMUNITY CONTACT PLAN:

ED will meet with Councilman Scott Mentzer, local hospital, and Fire/Police Chief/s weekly to discuss progress/updates on the below plan for improvement. ED and facility leadership are committed to becoming better neighbors and an asset in the Bluffton community. ED will provide relevant staffing and operational data the day prior to the weekly meeting, once both the community partners and facility leadership have agreed that progress is sufficient, the cadence of meeting will decrease to monthly. Topics will include: staffing, operations, safety, community satisfaction, opportunities for partnership, and discovery.

ADDITIONAL CONTACT:

ED has opened her direct contact and calendar to concerned or interested citizens who would like to meet either in person or via phone/Teams/Zoom. Contact above, there are no prerequisites to requesting such a meeting, feel free to reach out directly to ED by text or email.

INVESTIGATION FINDINGS & PLAN

I FACILITY OPERATIONS

FINDINGS

1. Current discharge planning policies and procedures are designed for facilities that are located in more urban areas where access to public transportation or alternative safe transportation is more readily available. This same approach to transportation is not effective at this location and is leading to negative community impact and patient experience.
2. Current discharge planning policies do not effectively account for developing a safe discharge plan for individuals who choose to discharge against staff advice or if administratively discharged.
3. Current storage of personal belongings in administrative safe does not set patient up for success as mobile phone or other electronic devices needed to arrange for aftercare plan or transportation are not fully charged at time of discharge, regardless of type of discharge.

ACTIONS

1. Policy and procedure will be amended to ensure that safe transportation is obtained or provided to all discharges who are able to remain safe in the facility until this transportation can be arranged, the patients retain the right to refuse transportation by Landmark staff.
2. Landmark will provide a safe space for all unplanned discharges to wait while transportation is arranged that is warm, has available phone charging stations, as well as access to necessary personal needs such as restroom.
3. Discharge planning policy will be amended to include development of a safe discharge plan for individuals who are choosing to leave against staff advice or who are subject to administrative discharge, the patients retain the right to refuse this plan.
4. To ensure that electronic devices such as mobile phones or tablets that may contain critical contact information are fully charged at time of discharge, the facility shall purchase and implement charging bricks for the administrative safe as well as access to charging outlets in the waiting room.
5. All admitting patients will receive education and a document outlining expectations and community rules. This document includes education on behavior expectations while in care, storage and receipt of personal belongings, use of the waiting room, transportation, and interaction with the community outside of the facility.

1. a. Safe transportation plans for all discharges, no matter discharge type, has been implemented successfully and followed by all staff - regardless of time of day. Should patient elopement without discharge plan in place occur, police will be notified within 5-minutes of discovery.
2. a. Temporarily an office located in the lobby is able to be utilized, or the lobby itself, which is equipped with bathroom, entertainment, snacks, and waters for patients to utilize while waiting for transportation. Executive Director has discussed with Scott Mentzer, Councilman, the possibility to partner with a local contractor from Bluffton to construct the wall which will section a portion of the outpatient unit for the permanent transportation safe haven, this area is equipped with a kitchenette, full bathroom facilities, refreshments, and entertainment.
3. a. Both the temporary solution of the lobby, and the permanent safe haven in the outpatient unit have sufficient amenities to provide patients the ability to charge electronics or utilize facility electronics to arrange safe transport, should transport not be set prior.

INVESTIGATION FINDINGS & PLAN

II STAFFING

FINDINGS

1. Facility leadership needs to be stronger.
2. Staffing-to-patient ratios on certain shifts need to be enhanced, which has led to an above-expectation increase in patients leaving against staff advice.
3. Insufficiently training staff, leading to patient and staff retention challenges and de-escalation protocols not being properly executed.

ACTIONS

1. We are actively sourcing new executive leadership for this location and will replace any other leadership positions that are not meeting the bar.
2. We have increased the frequency of New Employee Orientation to allow for weekly onboarding of new staff members to fill any existing gaps and ensure that future gaps are able to be filled expeditiously.
3. We will provide training support to departments that are not meeting standards with key focus on retention techniques, conducting room searches, patient rounding, personal belonging searches, and discharge protocols.

1a. Drew Mack is interim ED, Ethan Koby is joining as AED, PEM is no longer with company, permanent ED will be in training 4/3/23, starting in facility on 5/1/23.

1b. Interim ED Drew Mack is opening her calendar to concerned citizens, community partners, local EMS, etc. for discovery meetings, building relationships, etc. Her contact is 317-294-6599, or drew.mack@landmarkrecovery.com.

2.a. Partnering with Elite Medical Staffing to fill nursing holes, temp nurses will join the facility on 3/13/23, admissions will pause from 3/10/23-3/12/23 to protect nurse to patient ratios in the interim.

3.a. Implementation staff is being deployed for further training in the engagement department, to further enhance retention training and safe discharge procedures.

INVESTIGATION FINDINGS & PLAN

III ENHANCEMENT TO TRAINING

FINDINGS

1. Insufficiently training staff, leading to patient and staff retention challenges and de-escalation protocols not being properly executed.
2. Current de-escalation training is insufficient and contributing to against staff advice and administrative discharges.

ACTIONS

1. We will provide training support to departments that are not meeting standards with key focus on retention techniques, conducting room searches, patient rounding, personal belonging searches, and discharge protocols.
2. Landmark Recovery is partnering with an evidence-based de-escalation training provider who will provide training to improve our interventions to prevent and respond to verbal and physical violence.

1.a. Discharge protocols have been implemented and patient's who are discharging will be provided with a safe transportation plan, regardless of discharge types. Should a true "abscond" (patient eloping from facility campus with no discharge plan or transportation) occur, facility will alert police within 5 minutes.

1.b. Drew Mack will meet with Scott Mentzer (councilman), Fire Chief, and Police Chief weekly, providing updated data for both discharge types and staffing updates. Community partners and facility leadership will debrief on improvements as related to staffing and training.

TIMELINE & ACCOUNTABILITY

FACILITY OPERATIONS

Facility Operations have been implemented, the only outstanding task will include the construction of the wall for the permanent safe haven.

- We anticipate this will be fully implemented by 3/31/2023

STAFFING

Training for permanent ED 4/3, on site 5/1

- We are actively sourcing candidates for the Executive leadership positions and hope to have this individual in place by the end of March or early April.
- Increase to the frequency of NEO is already implemented.
 - Committed to partnering with aforementioned staffing agency until permanent nursing roles are filled to meet reasonable nurse to patient ratios

ENHANCEMENT TO TRAINING

- Additional support and training is in motion for this location and will continue throughout the month of March.
- De-escalation training will be complete for our internal trainers by 3/31/2023 and Indiana locations will be the first locations where staff receive this new, evidence-based training. We anticipate this will be complete by 4/14/2023.

CONCLUSION

Landmark Recovery has taken a humble approach to investigating the issues, missteps, findings, and remedies to be the best-in-class substance use disorder treatment facility that we are known for at other locations.

We recognize that the population we serve can be challenging and being able to provide these much needed services in a welcoming community like Bluffton is a great gift for these individuals and for our organization. We recognize that we made some mistakes and failed to account for some differences between this location and our more urban locations. We welcome the feedback from the community and the chamber and are committed to doing better.

Thank you for the opportunity to work collaboratively with the chamber, our community partners, and the residents of the City of Bluffton. We look forward to remaining in contact to discuss progress on our improvements and any other opportunities that may arise.