

## **Mental Health Idea Exchange: Supply Chain of Social Impact and Innovation in Charlotte, NC**

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### **Abstract**

Hosted by RSM's Nonprofit and Education Industry Leader, Next Stage, and the Foundation For The Carolinas, the Mental Health Idea Exchange held in Charlotte, NC, in October 2024 convened a broad and diverse group of nonprofit, government, foundation, behavioral health provider and education leaders and frontline staff to share innovative models being carried out in the Charlotte region and beyond. Rich discussions following the panel presentations from multiple regions of the nation revealed common themes focusing on the ongoing need for more behavioral health services to address the opioid crisis, continued fallout from the COVID-19 pandemic, stigma associated with mental health challenges, and the need for training and support of mental health providers and educators who in turn support the most vulnerable. The Mental Health Idea Exchange inspired the recognition that Charlotte has evolved in its behavioral health systems approach while recognizing that there is still work to be done.

### **Background and Context**

Hosted by RSM's Nonprofit and Education Industry Leader, Next Stage, and the Foundation For The Carolinas, the Mental Health Idea Exchange held in Charlotte, NC, in October 2024 convened a broad and diverse group of nonprofit, government, foundation, behavioral health provider and education leaders and frontline staff to share innovative models in behavioral health being carried out in the Charlotte region. Innovators implementing models in other areas of the country presented their approaches that enhance behavioral health and healthcare services. Rich panel discussions throughout the Idea Exchange event revealed many common themes among the innovators and highlighted how far the Charlotte behavioral health community has come in creating a cohesive system of care for its residents.

One of the strongest emerging themes of the Mental Health Idea Exchange is the concept that local context matters, along with meeting people where they are. Several studies on economic and social mobility, beginning with the "Chetty Study,"<sup>i</sup> published nearly a decade ago ranked Charlotte among the lowest of similar cities in terms of upward mobility. A more recent study by the same researchers looking at the childhood roots of social mobility pointed out that while Charlotte had dramatic increases in both job and wage growth over time, this was not the case for residents who were born and grew up there.<sup>ii</sup> There has been tremendous corporate investment in Charlotte over the last several decades, given its business-friendly environment and geographical location, which affords connectivity to fast-growing areas of the country.<sup>iii</sup> However, investment

in the nonprofit and provider sector has grown more slowly. The ways in which county and other government systems have engaged the provider community and residents have also evolved. The most recent study by researcher Raj Chetty, released in 2024, shows forward progress for the Charlotte region, which now ranks 38<sup>th</sup> out of 50 cities for economic mobility.<sup>iv</sup>

Charlotte is now at a crossroads of growth, and the “supply chain of social impact” is changing -- where resources start and where they make an impact. This evolution can be seen in the way that Mecklenburg County, where Charlotte sits, developed and carried out its behavioral health strategic plan, released in July 2024.<sup>v</sup> Mecklenburg County was responding to “a perfect storm” of an increasing behavioral health crisis of monumental proportions affecting the nation, “exacerbated by a convergence of factors, including COVID-19, the opioid epidemic, racial and socio-economic inequities, an increase in homelessness, and the pitfalls of social media.”<sup>vi</sup> A changing landscape of Medicaid expansion, occurring for the first time in 2023 in North Carolina, and the emergence of managed care models for individuals with the most complex needs, including people with intellectual disability and co-occurring behavioral and medical challenges, has required the County to reassess its behavioral health service delivery model and to recognize the urgent need to de-silo services and systems. To this end, in a year-long effort, the County brought together a large number of stakeholders from the major systems and community-level agencies, including representatives from law enforcement, the justice system, hospital systems, managed care organizations, provider and advocacy organizations, and community members, in order to create a plan that would address the need to ensure: 1) collaborative and coordinated care, 2) social determinants of health needs are being met, 3) prevention and early intervention services are in place, 4) access to care, and 5) gaps in the service array are filled.

At the same time, in 2023, having identified the opioid crisis as one of the most urgent problems that could not wait, the County was able to rapidly invest Opioid Settlement funds in fiscal year 2024 in eight high-impact strategies:

- Collaborative Strategic Planning
- Employment-Related Services
- Early Intervention
- Evidence-Based Addiction Treatment
- Syringe Services Programs
- Naloxone Distribution
- Recovery Support Services
- Recovery Housing Support

The County implemented an intensive information-gathering process engaging 96 people with lived experience and their family members in six small events to garner input on the most pressing goals to be met and engaging 75 residents in their annual community summit whose input reflected similar priorities. Contracts were quickly executed with fourteen agencies so that they could initiate new programs or expand existing ones to address the needs identified. The County achieved key successes during the fiscal year 2024, such as ensuring the availability of naloxone resources at Charlotte-Mecklenburg public schools and across law enforcement

agencies, expanding Medication Assisted Treatment services for the uninsured and underinsured, and establishing new housing, early intervention, and workforce development programs for community residents experiencing or at risk of opioid use disorder. The county also hired a new staff member to support the implementation of these initiatives with partner agencies.<sup>vii</sup> All of these efforts show a remarkable ability to rapidly and nimbly deploy an infusion of new funding in alignment with the evolving behavioral health strategic plan priorities while being responsive to needs identified by the affected communities themselves.

Further reflecting the importance of local context and partnerships, the Mayor's Racial Equity Initiative<sup>viii</sup>, launched in 2021, brought together organizations with natural community and business alignment and public-private investment to address inequities and remove barriers to opportunity in Charlotte and raised nearly \$250 million to address its goals. The four priority areas for this initiative are:

- Bridging the digital divide and establishing a Center for Digital Equity
- Investing in Charlotte's six "Corridors of Opportunity" neighborhoods
- Transforming JCSU into a top-tier, career-focused HBCU
- Ensuring organizations commit to racial equity through advancing more Black leaders and leaders of color within their individual corporations.

In fact, inspired in part by the Mayor's Racial Equity initiative and its focus on Charlotte specifically, the former United Way of Central Carolinas adopted a new name, United Way of Greater Charlotte, to better reflect a more "specific geography" and connect investments to where they are most needed on a local level within Charlotte and neighboring counties. Significant investment over the past year in projects such as the Mayor's Racial Equity Initiative priority on "Corridors of Opportunity," which will have an impact on more than 50 neighborhoods.<sup>ix</sup> United Way's community investments go a long way toward promoting economic mobility in the Charlotte region.

### **Mental Health Idea Exchange: Three innovative models**

Three innovative models operating in Charlotte were highlighted, which have in common addressing an unmet need, meeting people where they are, and collaborating across partners and sectors.

**Hope Haven**, founded in 1976, began as a residential treatment home for women in early recovery from alcoholism. Now serving over 300 men, women, and children annually, Hope Haven is a licensed residential Therapeutic Community operating on an eight-acre former motel complex, providing individual and group counseling, medical and mental health care, workforce development, job readiness, assistance with employment and permanent housing, all of which prepares people for healthy independent living. Hope Haven opened **The Forum** in 2023 as a community hub for education, training, mentoring, and collaboration for non-profit professionals. This initiative was in direct response to the demonstrated lack of resources for frontline workers. Hope Haven started with the basics, offering classes on topics such as Trauma-Informed Care, De-Escalation Techniques, Ethics and Boundaries, Mental Health, and

Substance Use 101. They polled their partners often, identifying other needs. They submitted the curriculum to state licensing boards so the classes were eligible for CEUs, which was an important incentive for people to take the classes. They also offered Self-Care Days for staff who were burned out and exhausted. By 2024, they expanded offerings to include Motivational Interviewing, Cultural Competency, Race-based Stress and Trauma, and Leadership Development for mid-level managers. Last year, over 1600 colleagues in the health and human services field in the Charlotte area walked through the doors of The Forum at Hope Haven to attend a class or event. These colleagues were from more than 70 different agencies.

**Emerald School of Excellence**, founded in 2017 and opened in 2019, North Carolina's first recovery high school, was founded to address the gap in care for recovering teens transitioning from higher levels of care back to school. Recovery high schools are secondary schools designed specifically for adolescents in recovery from substance use disorders or co-occurring mental health conditions. Emerald School of Excellence is among the few recovery high schools focusing on both mental health and substance use disorder. It offers personalized learning, recovery-focused support, daily one-on-one support, a supportive environment, and a focus on the future. Peer support is an important tool in the school's approaches, and it has had a positive impact on the students. Emerald School of Excellence incorporates core values of faith, fitness, and fellowship, whose innovative approach cultivates a holistic learning environment. The school intensively focuses on career pathways, which serves as a significant motivation for students as they progress through their recovery journey. Numerous students have made a career path in the helping professions as a result of their experiences.

The Steve Smith Family Foundation launched the **Behavioral Health Urgent Care (BHUC)** last year as an expansion of the Smith Family Wellness Center in Charlotte. Key partners are Alliance Health and Mecklenburg County Government, with Daymark Recovery Services operating as the service provider. The BHUC is an alternative to community hospital Emergency Departments, allowing patients with urgent behavioral health needs to receive triage and referral to services. Similar to the urgent care model, the BHUC meets community members where they are and addresses their needs on the spot. Services include rapid assessment and diagnostic screening, short-term evaluation, stabilization and referral, medication evaluation, brief crisis counseling, outpatient treatment, peer support in coordination with other community resources, and discharge planning and resources for follow-up care. The public-private partnerships set this model apart and have served to strengthen its ability to reach community members with much-needed services while keeping a laser focus on urgent care.

### **Overarching themes and key takeaways from the Mental Health Idea Exchange discussions**

Several resounding themes emerged from the Mental Health Idea Exchange through the panel and breakout discussions. These included that despite barriers such as lack of adequate funding, there is an enormous amount of informal collaboration across the organizations providing mental health services, especially among those on the front lines, which offers a significant benefit to individual workers and organizations as a whole. Much coordination is required to weave services together, and there is little or no funding for this type of coordination. Participants concluded:

- No two communities are the same. Even within Charlotte, there is tremendous variation in needs and resources.

- However, we can learn from other regions about their best practices, programs, and policies.
- We excel in our ability to partner across organizations.
- We are currently more reactive than proactive.
- A major concern is how the generation of youth who experienced the COVID-19 pandemic in their school-age years will fare as they reach adulthood.
- There is an urgent need for workforce training and support, especially for mental health providers and educators who experience their own trauma and burnout.

### **Recommendations from the Mental Health Idea Exchange**

- There is common knowledge about how to address literal fire – “stop, drop, and roll.” Let’s do that for emotional fire. Address the workforce crisis by providing training and tangible support for mental health providers and educators.
- Know your community – they are all different, and needs and resources vary. Meet people where they are.
- Continue to explore partnerships that help leverage resources and expertise.
- Drive more funding towards behavioral health services and find ways to pay for unfunded or underfunded services such as service coordination and training.
- Expand peer supports. They are proven to be effective.
- Continue to employ a variety of strategies to address stigma that continues to surround mental health issues. The arts can be a powerful force to reduce stigma and normalize mental health.
- Continue the discussion with groups in other regions so that we can learn together.

### **Role of Innovation in Behavioral Health**

The Mental Health Idea Exchange focused less specifically on individual practice than on the broader systems and collaborative frameworks that enable innovation to thrive in behavioral health. Discussions emphasized the importance of designing adaptable, community-informed models that address systemic challenges, such as workforce shortages, fragmented service delivery, and gaps in funding. By exploring initiatives from both local and national contexts, participants were encouraged to think beyond traditional approaches to behavioral health, embracing strategies that integrate technology, cross-sector partnerships, and grassroots community engagement.

This systems-level focus reinforced the idea that sustainable innovation requires not only creative problem-solving but also the alignment of resources, policies, and organizational culture to support ongoing transformation. Participants explored how innovative models, such as Hope Haven's workforce development programs and the Behavioral Health Urgent Care, demonstrate the power of partnerships to scale impact and address complex community needs. The exchange highlighted that innovation in behavioral health is not a standalone endeavor but part of a dynamic, interconnected ecosystem aimed at fostering resilience and equity.

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<sup>i</sup>Chetty, Raj, and Nathaniel Hendren. "The impacts of neighborhoods on intergenerational mobility: Childhood exposure effects and county-level estimates." Harvard University and NBER 133, no. 3 (2015): 1-145.

<sup>ii</sup>Chetty, Raj, John N. Friedman, Nathaniel Hendren, Maggie R. Jones, and Sonya R. Porter. The opportunity atlas: Mapping the childhood roots of social mobility. No. w25147. National Bureau of Economic Research, 2018.

<sup>iii</sup><https://pgcgroup.com/blog/why-do-business-in-charlotte>.

<sup>iv</sup><https://opportunityinsights.org/paper/changingopportunity/>. Downloaded 10/5/24.

<sup>v</sup>Mecklenburg County Behavioral Health Strategic Plan, July 2024. Downloaded 10/5/24.

<https://mgr.mecknc.gov/initiatives/BHSP>.

<sup>vi</sup>Ibid.

<sup>vii</sup>Marcus Boyd, CMO Program Manager, County Manager's Office, Mecklenburg County. Report shared through personal communication, 2024.

<sup>viii</sup><https://www.equityclt.org/#about>. Downloaded 10/5/24.

<sup>ix</sup><https://www.thecharlottepost.com/news/2023/01/12/local-state/united-way-takes-new-name-16m-in-2023-investments/>. Downloaded 10/5/24.