



STATE OF ARIZONA  
BOARD OF BEHAVIORAL HEALTH EXAMINERS  
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KATIE HOBBS  
Governor

TOBI ZAVALA  
Executive Director

BOARD OF BEHAVIORAL HEALTH EXAMINERS  
MEETING MINUTES  
March 8, 2024

Members Present: Robert Charles, Mary Coonrod, Leanette Henagan, Adalesa Meek, Dominic Miller, Diane Palacios, Mark Shen, Antwan Trotter

Members Absent: Kimberly Bailey

Staff Present: Tobi Zavala, Executive Director; Mona Baskin, A.A.G., Jarett Carver, Investigations Manager; Allison Taylor, Operations Manager

**1. Call to Order**

A meeting of the Arizona Board of Behavioral Health Examiners was called to order on March 8, 2024, at 9:01 a.m. at 1740 West Adams Street, Board Room C, Phoenix, Arizona 85007 with Ms. Meek presiding.

**2. Roll Call**

See above.

**3. Minutes: review, consideration and action**

A. *January 12, 2024, general meeting minutes*

Tabled due to lack of quorum of members to vote.

B. *January 12, 2024, executive session minutes/agenda item 7D*

Tabled due to lack of quorum of members to vote.

C. *February 9, 2024, general meeting minutes*

Tabled due to lack of quorum of members to vote.

D. *February 9, 2024, executive session minutes/agenda item 7D*

Tabled due to lack of quorum of members to vote.

E. *February 9, 2024, executive session minutes/agenda item 12I*

Tabled due to lack of quorum of members to vote.

**4. Consent Agenda: review, consideration and action**

A. Cases recommended for dismissal

1. 2024-0122, Courtney Bogardus, LMSW-16967
2. 2024-0201, Jessica Conlon, LMFT-10404
3. 2024-0134, Danielle Derrick, LPC-20204
4. 2023-0211, 2023-0212 Denise Hausler, LPC-11176
5. 2024-0012, Timothy Mills, LPC-15304
6. 2024-0139, Melissa Milliken, LPC-18543
7. 2024-0058, Lindsay Redman, LPC-15695

Following discussion, Ms. Palacios moved, seconded by Ms. Henagan, to approve the consent agenda item 4(A)(1-3 and 5-6). The motion passed unanimously.

For consent agenda item 4(A)(3), Ms. Palacios disclosed she knows the licensee in a professional capacity but she can review and vote on the case objectively.

4. 2023-0211, 2023-0212 Denise Hausler, LPC-11176  
Ms. Zavala summarized the Board's investigation.

The complainants appeared and addressed the Board.

The professional was properly noticed, but failed to appear.

Following discussion, Ms. Henagan moved, seconded by Mr. Trotter, to dismiss the complaint. The motion passed unanimously.

7. 2024-0058, Lindsay Redman, LPC-15695  
Ms. Zavala summarized the Board's investigation.

The complainant could not be reached telephonically at the number provided.

The professional and her attorney, Flynn Carey, were available for questions.

Following discussion, Mr. Shen moved, seconded by Ms. Palacios, to dismiss the complaint. The motion passed unanimously.

B. Cases recommended for dismissal with a letter of concern.

1. 2023-0230, Patrick Roland, LASAC-15380

Following discussion, Ms. Palacios moved, seconded by Ms. Henagan, to approve the consent agenda item 4(B)(1). The motion passed unanimously.

2. 2024-0005, Candace Wilson, LMSW-18498

Tabled due to lack of quorum of members to vote.

C. Cases recommended for opening a complaint and dismissing with a letter of concern

N/A

D. Cases recommended for acceptance of a proposed signed non-disciplinary consent agreement.

1. 2024-0008, Konia Nikas, LISAC-1704, LPC-2292

2. 2024-0002, Joe Ellis, LISAC-11805

Following discussion, Ms. Palacios moved, seconded by Mr. Trotter, to approve the consent agenda item 4(D). The motion passed unanimously.

E. Cases recommended for opening a complaint and acceptance of a proposed signed non-disciplinary consent agreement.

1. Carter Gilmore, LMSW-21834

Following discussion, Ms. Palacios moved, seconded by Ms. Coonrod, to approve the consent agenda item 4(E). The motion passed unanimously.

F. Cases recommended for acceptance of a proposed signed disciplinary consent agreement.

A. 2023-0195, Kathryn Forsyth, LPC-10773

Following discussion by members, Ms. Palacios moved, seconded by Mr. Miller, to accept the proposed signed consent agreement. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Adalesa Meek	Dominic Miller	Diane Palacios	Mark Shen	Antwan Trotter
AYE		X	X	X	X	X	X	X	X
NAY									
Absent	X								

B. Cases recommended for opening a complaint and acceptance of a proposed signed disciplinary consent agreement.

N/A

C. Cases recommended for opening a complaint and denying for unprofessional conduct.

N/A

D. Cases recommended for release from consent agreements.

1. 2024-0069, *Celina Gravanda, LMSW-20869 (active-restricted)*

2. 2022-0127, *Adi Shakti Khalsa, LAC-18292 (active-restricted)*

3. 2021-0121, *Dwayne Kruse, LMFT-15582 (active-restricted)*

4. 2023-0046, *Alison Mell, LPC-16428*

5. 2022-0072, *Tamar Shindel, LPC-15554 (active-restricted)*

6. 2023-0062, *Lynda Weathersbee, LAC-21958 (active-restricted)*

Following discussion, Mr. Trotter moved, seconded by Ms. Palacios, to approve the consent agenda item 4(I). The motion passed unanimously.

**5. Administrative Hearings**

Administrative Hearing Pursuant to A.R.S. §§ 32-3281 and 41-1092.07, the Board will conduct administrative hearings or consider related procedural issues in the following matter(s). During the administrative hearing, the Board may go into executive session to discuss confidential records pursuant to A.R.S. § 38-431.03(A)(2) or to obtain legal advice pursuant to A.R.S. § 38-431.03(A)(3).

N/A

**6. Formal Interviews**

N/A

**7. Complaints and other disciplinary matters: review, consideration and action**

A. *Milissa Baugh, LASAC-15244*

Ms. Zavala summarized the background information.

The professional was properly noticed, but failed to appear.

Following review and discussion by members, Mr. Shen moved, seconded by Mr. Miller, to open a complaint for further investigation. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Adalesa Meek	Dominic Miller	Diane Palacios	Mark Shen	Antwan Trotter
AYE		X	X	X	X	X	X	X	X
NAY									
Absent	X								

B. 2023-0170, *Julia Gunthner, LPC-14300*

Ms. Zavala summarized the Board’s investigation.

The professional’s attorney, Flynn Carey, appeared in-person and addressed the Board.

Following discussion by members, Mr. Shen moved, seconded by Mr. Miller, to accept the signed modified proposed consent agreement. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Adalesa Meek	Dominic Miller	Diane Palacios	Mark Shen	Antwan Trotter
AYE		X	X	X	X	X	X	X	X
NAY									
Absent	X								

C. 2023-0168, *Sharon Hollenbeck, LPC-18285*

Ms. Zavala summarized the background information.

The complainant was properly noticed, but failed to appear.

The professional’s attorney, David Klink, appeared and addressed the Board.

Following review and discussion by members, Ms. Henagan moved, seconded by Ms. Palacios, to find the following violations:

- A.R.S. § 32-3251(16)(k), engaging in any conduct or practice that is contrary to recognized standards of ethics in the behavioral health profession or that constitutes a danger to the health, welfare or safety of a client as it relates to the following section of the ACA Code of Ethics:
  - A.8. Multiple Clients
- A.R.S. § 32-3251(16)(s), terminating behavioral health services to a client without making an appropriate referral for continuation of care for the client if continuing behavioral health services are indicated.
- A.R.S. § 32-3251(16)(p), failing to conform to minimum practice standards as developed by the board as it relates to:
  - A.A.C. R4-6-1101. Consent for Treatment
  - A.A.C. R4-6-1102. Treatment Plan
  - A.A.C. R4-6-1104. Financial and Billing Records
  - A.A.C. R4-6-1105. Confidentiality

The motion passed unanimously.

Following further review, Ms. Henagan moved, seconded by Ms. Palacios, to offer a consent agreement that stipulates the following:

- The licensee shall be placed on probation for 24 months
- The licensee shall complete pre-approved continuing education in:
  - 5 clock hours in attendance of a Board meeting
  - 6 clock hours in high-conflict court cases with families
  - 6 clock hours in behavioral health ethics
  - 3 clock hours in Arizona documentation in person
- The professional shall receive clinical supervision monthly from a pre-approved independently licensed behavioral health professional
- Clinical supervision shall focus on Board statutes and rules, scope of practice, continuity of care, Arizona documentation, and multiple roles
- Early release available after 12 months at the recommendation of the clinical supervisor

and if not signed, to invite the professional to participate in a formal interview and, if not accepted to remand the matter to a formal hearing. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Adalesa Meek	Dominic Miller	Diane Palacios	Mark Shen	Antwan Trotter
A YE		X	X	X	X	X	X	X	X
NAY									
Absent	X								

*D. 2024-0065, Sharon Hollenbeck, LPC-18285*

Ms. Zavala summarized the Board’s investigation.

The complainant was properly noticed, but failed to appear.

The professional’s attorney, David Kink, appeared and addressed the Board.

Following discussion, Mr. Trotter moved, seconded by Ms. Henagan, to dismiss the complaint. The motion passed unanimously.

The Board took a break 11:45 a.m., reconvening its public meeting at 12:16 p.m.

E. 2023-0208, Gigi Marteney, LPC-2540

Mr. Carver summarized the Board's investigation.

The complainant appeared and addressed the Board.

The professional appeared telephonically and her attorney, Mandi Karvis, appeared in-person and addressed the Board.

Following review and discussion by members, Ms. Henagan moved, seconded by Ms. Palacios, to find the following violations:

- A.R.S. § 32-3251(16)(m), engaging or offering to engage as a licensee in activities that are not congruent with the licensee's professional education, training or experience.
- A.R.S. § 32-3251(16)(p), failing to conform to minimum practice standards as developed by the board as it relates to:
  - A.A.C. R4-6-1101. Consent for Treatment
  - A.A.C. R4-6-1103. Client Record
  - A.A.C. R4-6-1104. Financial and Billing Records
  - A.A.C. R4-6-1105. Confidentiality

Following further review, Ms. Henagan moved, seconded by Ms. Palacios, to offer a consent agreement that stipulates the following:

- The licensee shall be placed on probation for 24 months
- The licensee shall complete pre-approved continuing education in:
  - 6 clock hours in behavioral health ethics to include scope of practice and decision-making model
  - 3 clock hours in how to handle subpoenas
  - 3 clock hours in attendance of a Board meeting
  - 3 clock hours in fraud and abuse
  - 3 clock hours in cultural competency as it relates to blended families
  - 3 clock hours in high-conflict cases
- The professional shall receive clinical supervision monthly from a pre-approved independently licensed behavioral health professional
- Clinical supervision shall focus on Board statutes and rules specifically noting what is referred to, Arizona documentation, cultural competency, and scope of practice
- Early release available after 12 months at the recommendation of the clinical supervisor

and if not signed, to invite the professional to participate in a formal interview and, if not accepted to remand the matter to a formal hearing. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leannette Henagan	Adalesa Meek	Dominic Miller	Diane Palacios	Mark Shen	Antwan Trotter
AYE		X	X	X	X	X	X	X	X
NAY									
Absent	X								

F. 2024-0022, Tracy Palmer, LPC-12995

Ms. Zavala summarized the Board's investigation.

The complainant appeared telephonically and addressed the Board.

The professional and her attorney, Flynn Carey, appeared in-person and addressed the Board.

Following discussion, Mr. Shen moved, seconded by Mr. Miller to accept the proposed signed non-disciplinary consent

agreement. The motion passed unanimously. Ms. Meek recused.

*G. 2024-0007, Joy Plote, LAC-20272*

Mr. Carver summarized the Board’s investigation.

The complainant was properly noticed, but failed to appear.

The professional appeared and addressed the Board.

Following review and discussion by members, Ms. Palacios moved, seconded by Mr. Miller, to find the following violations:

- A.R.S. § 32-3251(16)(ii), violating any federal or state law, rule or regulation applicable to the practice of behavioral health, as it relates to:
  - A.R.S. § 13-3620. Duty to Report Abuse

The motion passed unanimously. Mr. Shen recused.

Following further review, Ms. Palacios moved, seconded by Ms. Coonrod, to offer a consent agreement that stipulates the following:

- The licensee shall be placed on probation for 12 months
- The licensee shall complete pre-approved continuing education in:
  - 5 clock hours in attendance of a Board meeting
  - 3 clock hours in Arizona documentation
  - 3 clock hours in mandatory reporting
  - 3 clock hours in self-care/ compassion and fatigue

and if not signed, to invite the professional to participate in a formal interview and, if not accepted to remand the matter to a formal hearing. The motion passed unanimously. Mr. Shen recused.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Adalesa Meek	Dominic Miller	Diane Palacios	Mark Shen	Antwan Trotter
AYE		X	X	X	X	X	X		X
NAY									
Absent	X							Recused	

*H. 2023-0193, Joanne Sanderl, LPC-1511*

Ms. Zavala summarized the Board’s investigation.

The Complainant appeared telephonically and address the Board.

The professional appeared telephonically and addressed the Board.

Following review and discussion by members, Ms. Palacios moved, seconded by Ms. Coonrod, to find the following violations:

- A.R.S. § 32-3251(16)(m), engaging or offering to engage as a licensee in activities that are not congruent with the licensee's professional education, training or experience
- A.R.S. § 32-3251(16)(q), failing or refusing to maintain adequate records of behavioral health services provided to a client.
- A.R.S. § 32-3251(16)(p), failing to conform to minimum practice standards as developed by the board as it relates to:
  - A.A.C. R4-6-1101. Consent for Treatment
  - A.A.C. R4-6-1102. Treatment Plan
  - A.A.C. R4-6-1103. Client Record
  - A.A.C. R4-6-1104. Financial and Billing Records
  - A.A.C. R4-6-1106. Telepractice

Following further review, Ms. Palacios moved, seconded by Ms. Henagan, to offer a consent agreement that stipulates the following:

- The licensee shall be placed on probation for 12 months
- The licensee shall complete pre-approved continuing education in:
  - 6 clock hours in working with couples and families
  - 6 clock hours in Arizona documentation
  - 3 clock hours in handling subpoenas
  - 5 clock hours in attendance of a Board meeting
  - 3 clock hours in best practice telehealth

and if not signed, to invite the professional to participate in a formal interview and, if not accepted to remand the matter to a formal hearing. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Adalesa Meek	Dominic Miller	Diane Palacios	Mark Shen	Antwan Trotter
AYE		X	X	X	X	X	X	X	X
NAY									
Absent	X								

*I. 2024-0124, Michael Smith, LPC-19290 (active-restricted)*

Mr. Carter summarized the Board’s investigation.

The professional appeared and addressed the Board.

Following review and discussion by members, Ms. Palacios moved, seconded by Ms. Henagan, to find the following violations:

- A.R.S. § 32-3251(16)(k), engaging in any conduct or practice that is contrary to recognized standards of ethics in the behavioral health profession or that constitutes a danger to the health, welfare or safety of a client.
- A.R.S. § 32-3251(16)(ii), violating any federal or state law, rule or regulation applicable to the practice of behavioral health, as it relates to
  - A.A.C. R4-6-205. Change of Contact Information

The motion passed unanimously.

Following further discussion, Ms. Palacios moved, seconded by Mr. Shen, to consolidate complaint numbers 2023-0063 and 2024-0124. The motion passed unanimously.

Following further discussion, Ms. Palacios moved, seconded by Mr. Shen, to offer the professional a consent agreement for the voluntary surrender of the professional’s license. The motion passed unanimously.

Following discussion by members, Ms. Palacios moved, seconded by Ms. Miller, to amend the previous motion to include, if not signed, remand the matter to a formal hearing. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Adalesa Meek	Dominic Miller	Diane Palacios	Mark Shen	Antwan Trotter
AYE		X	X	X	X	X	X	X	X
NAY									
Absent	X								

*J. 2023-0217, Margaret Walden, LCSW-12325*

Ms. Zavala summarized the Board’s investigation.

The complainant appeared and addressed the Board.

The professional and her attorney, Robert Beardsley, appeared in-person and addressed the Board.

Following review and discussion by members, Ms. Palacios moved, seconded by Mr. Trotter, to find the following violations:

- A.R.S. § 32-3251(16)(k), engaging in any conduct or practice that is contrary to recognized standards of ethics in the behavioral health profession or that constitutes a danger to the health, welfare or safety of a client as it relates to the following section of the ACA Code of Ethics:
  - 1.06(c) Conflict of Interest
- A.R.S. § 32-3251(16)(p), failing to conform to minimum practice standards as developed by the board as it relates to:
  - A.A.C. R4-6-1101. Consent for Treatment
  - A.A.C. R4-6-1102. Treatment Plan
  - A.A.C. R4-6-1103. Client Record
  - A.A.C. R4-6-1104. Financial and Billing Records
  - A.A.C. R4-6-1105. Confidentiality

Following further review, Ms. Palacios moved, seconded by Ms. Henagan, to offer a consent agreement that stipulates the following:

- The licensee shall be placed on probation for 12 months
- The professional shall complete a pre-approved 3 semester credit hour graduate level course in behavioral health ethics
- The licensee shall complete pre-approved continuing education in:
  - 3 clock hours in Arizona documentation
  - 5 clock hours in attendance of a Board meeting
- The professional shall receive clinical supervision monthly from a pre-approved independently licensed behavioral health professional.
- Clinical supervision shall focus on use of consultation, dual relationships, decision-making model, Board statutes and rules, code of ethics, and Arizona documentation

and if not signed, to invite the professional to participate in a formal interview and, if not accepted to remand the matter to a formal hearing. The motion passed unanimously.

	Kimberly Bailey	Robert Charles	Mary Coonrod	Leanne Henagan	Adalesa Meek	Dominic Miller	Diane Palacios	Mark Shen	Antwan Trotter
AYE		X	X	X	X	X	X	X	X
NAY									
Absent	X								

*The Board took a break 10:27 a.m., reconvening its public meeting at 10:37 a.m.*

**8. Assistant Attorney General’s Report: Mona Baskin, A.A.G.**

N/A

**9. Applications for licensure and educational programs: review, consideration and action**

*A. Review, consideration, and possible action regarding applications for licensure Counseling*

Mr. Shen moved, seconded by Ms. Palacios, to deny 3 applications based on a failure to pass the required examination and 1 application based on a failure to take the required examination. The motion passed unanimously.

*Social Work*

Ms. Henagan moved, seconded by Ms. Palacios, to deny 11 applications based on a failure to pass the required examination. The motion passed unanimously.

*Marriage and Family Therapy*

Ms. Palacios moved, seconded by Ms. Coonrod, to deny 1 application based on a failure to pass the required examination and 1 application based on a failure to meet minimum requirements. The motion passed unanimously.



*Substance Abuse Counseling*

Ms. Henagan moved, seconded by Ms. Palacios, to deny 1 application based on a failure to pass the required examination. The motion passed unanimously.

*B. Review, consideration, and possible action regarding applications for educational programs*

N/A

**10. Report from Chair**

*A. Summary of current events*

No report.

*B. Discussion regarding Ms. Zavala's annual review*

Ms. Meek reminded members that the constructive feedback from members for Ms. Zavala's annual performance review is due by April 1, 2024. The Subcommittee will discuss the feedback received at the April 12, 2024, and May 10, 2024. Ms. Zavala's performance review will then be presented at the May Board meeting.

**11. Report from the Treasurer**

*A. Review, consideration, and possible action regarding February financial report*

Tabled due to lack of quorum of members to vote.

*B. Review, consideration, and possible action regarding March financial report*

Tabled due to lack of quorum of members to vote.

**12. Report from the Executive Director and/or staff**

*A. Update on Board members and appointments*

Ms. Zavala provided an update in regard to Board appointments. She reminded members that Ms. Knape submitted her resignation effective immediately. She welcomed Dominic Miller the new social work member to the Board. She also shared that the Governor's Office has been notified of the multiple vacancies.

*B. Update regarding the 2024 Sunset Audit by the Arizona Auditor General's Office*

Ms. Zavala provided an update regarding the 2024 Sunset Audit by the Arizona Auditor General's Office. She reminded the members the audit remains confidential but if there are any procedural questions she is available.

*C. Update on education tools*

Ms. Zavala shared with members that another educational tool has been uploaded to the website for licensees and applicants to use to keep track of their acquired hours for independent licensure.

*D. Update on staff changes*

Ms. Zavala reminded the members that Erin Yabu is no longer with the Board and shared her sincere appreciation and thanked Ms. Yabu for her service.

Additionally, Ms. Zavala shared that she hired a new Deputy Director, Polly Knape, who will start on March 18<sup>th</sup>.

*E. Review, consideration, and possible action regarding Ms. Zavala's attendance at the Association of Social Work Board's Educational Conference*

Ms. Zavala requested that she attend the Association of Social Work Boards Educational Conference which will be held in May in DC as she was asked to provide a presentation on clinical supervision.

Following discussion, Mr. Trotter moved, seconded by Mr. Trotter, to approve the attendance of Director Zavala, at the Social Work Board's Education Conference. The motion passed unanimously.

*F. Discussion regarding educating the public on school counselors*

Members discussed the importance of providing education to the public that school counselors that are providing psychotherapy must be licensed by the Board. The members considered sending a letter to the Arizona Department of Education or opening discussion regards to this.

The members sought comment from Christopher Evans, who shared the importance that school counselors are licensed.

Members asked that this discussion be continued.

*G. Review, consideration, and possible action regarding Dominic Miller's attendance at the board member training through the Association of Social Work Board's member training*

Ms. Zavala shared with members that Mr. Miller is signed up to attend the Association of Social Work Boards training for new board members in late March in Texas. She stated that she received approval from Ms. Meek for his attendance and would place it on the March agenda for full Board approval.

Following discussion, Mr. Trotter moved, seconded by Ms. Palacios, to approve the attendance of Mr. Miller at the Association of Social Work Board's member training. The motion passed unanimously.

*H. Review, consideration, and possible action regarding the Board's Secretary/Treasurer election*

Ms. Zavala shared with members that with Ms. Knape resigning from the Board a new secretary/treasurer would need to be voted in. She also stated that Ms. Palacios has expressed interest.

Following review and discussion by members, Mr. Trotter moved, seconded by Ms. Henagan, to elect Ms. Palacios as Board Secretary Treasurer. The motion passed unanimously.

**13. Request for extension of inactive status: review, consideration and action**

N/A

**14. Future agenda items**

Continue discussion on educating the public regarding school counselors

**15. Call for public comment**

None.

**16. Establishment of future meeting date(s)**

*The next regular meeting is scheduled for Friday, April 12, 2024, at 9:00 a.m., at 1740 W. Adams St., Board Room C.*

**17. Adjournment**

Mr. Trotter moved, seconded by Ms. Palacios, to adjourn. The motion passed and the meeting was adjourned at 2:09 p.m.

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Diane Palacios  
Secretary/Treasurer

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Date