



**ONSITE  
PROGRAM**

# County Behavioral Health Fiscal Leadership Institute

June 4-5, 2019

Sheraton Grand Hotel Sacramento  
13th and J Street  
Sacramento, California 95814

In an effort to make the access to information easier, and to bring down paper waste, the California Institute for Behavioral Health Solutions (CIBHS) would like to invite you to use the below QR (Quick Response) Code to access information posted on our CIBHS webpage. We are providing free access to WiFi to be able to take advantage of this feature. Here are some instructions on how to utilize this technology using your Cell Phone:

**Apple iPhone Users:** Open the "Camera" app on your phone, and hold the reader over the QR Code. Our website will automatically pop up with a link from your Safari Navigation Pane to access the page. Click it and you will be automatically directed.

**Android Users:** Please download a QR Reader app and follow the instructions to be able to access.



Using the QR Code, you will be automatically directed to the "Spring 2019 County Behavioral Health Fiscal Leadership Institute" page on our website. There you will find the PowerPoints and Handouts from all of the presentations which are available for quick download. We also encourage you to access the online Evaluation Form on this page to give us your feedback online to help us shape the content and focus of future Fiscal Leadership Institutes.

If you have any difficulty using this technology, feel free to type in this link to your browser: <http://bit.ly/2w1ijvd> Or if you continue to have difficulty with the QR Reader, check in with Gerilyn Walcott at the registration desk by 10:30am and she will help you troubleshoot.

We also invite you to make use of our "County Resource Room" located in the "Tofanelli" room on the 2nd Floor. Equipped with tables, chairs, and power strips, the Resource Room is available throughout the two-day institute to any attendee who needs to do work, take a call, or charge their equipment. In addition you can browse County Resource Information tables which display resources contributed by your County peers that you may find useful. Feel free to bring your own brochures, program information, resources, templates, best practices, etc. to share with other Counties.

June 4, 2019

Dear Fiscal Leadership Institute Attendees,

Welcome to the fifteenth California Institute for Behavioral Health Solutions (CIBHS) Fiscal Leadership Institute! We look forward to spending the next two days with you, and hope that you will enjoy connecting with colleagues who share the ongoing challenges of implementing behavioral health care fiscal policy in counties of all sizes throughout California. CIBHS deeply appreciates the support and financial sponsorship of the institute by the California Department of Healthcare Services.

The purpose of the Fiscal Leadership Institute is to bring together experts in the field to engage with you regarding the latest information, policy and compliance drivers, strategy and innovations concerning behavioral health fiscal policy and practice. The Agenda of the institute reflects the complexity of the many demands that fiscal leaders must contend with every day. Please use our time together to ask and receive answers to the tough questions you, your stakeholders and constituents face, and to continue to build relationships with peers and experts you can call on for information and support in the future.

We are always delighted to welcome new participants to the Institute! CIBHS is committed to continue to facilitate ease of access to the technical knowledge and expertise necessary for your continued success. To this end, the County-to-County sessions can also prove to be of great value. Please be sure to take advantage of the immense historical, practical and experiential knowledge that exists amongst yourselves concerning the interpretation and implementation of fiscal policy.

Again, welcome!



Percy Howard III, LCSW  
President and Chief Executive Officer, CIBHS



Kristy Kelly, MA, MFT  
CIBHS Consultant

**TUESDAY, JUNE 4, 2019**    **STATE-AND-COUNTY**

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9:00 AM	<b>REGISTRATION/COFFEE/LIGHT CONTINENTAL BREAKFAST</b>	Camellia Foyer
10:00 AM	<b>WELCOME AND INTRODUCTIONS</b> <b>Kristy Kelly, MA, MFT</b> , Consultant, California Institute for Behavioral Health Solutions (CIBHS)	Camellia Room
10:15 AM	<b>OPENING REMARKS</b> <b>Rick Goscha, PhD</b> , Senior Vice President of Programs, CIBHS <b>Michelle Doty Cabrera</b> , Executive Director, County Behavioral Health Directors Association of California (CBHDA)	Camellia Room
10:30 AM	<b>POLICY AND FUNDING UPDATES FROM THE DEPARTMENT OF HEALTH CARE SERVICES</b> <b>Chuck Anders</b> , Chief, Mental Health Management and Performance Outcomes Branch, Mental Health Services Division, Department of Health Care Services (DHCS)  This session will address emerging behavioral health policy developments from a state perspective and their potential fiscal implications for county behavioral health agencies. Topics will include but are not limited to: Higher Level Updates on Medi-Cal waiver 2020, the MHSUDS reorganization, and the MHSA Fiscal Regulations.	Camellia Room
12:00 PM	<b>LUNCH (included with registration)</b>	Camellia Room
1:00 PM	<b>MENTAL HEALTH &amp; SUD COST REPORTING: PART 1</b> <b>Chuck Anders</b> , Chief, Mental Health Management and Performance Outcomes Branch, Mental Health Services Division, DHCS <b>Moses Ndungu</b> , Chief, Fiscal Policy Section, Mental Health Management and Performance Outcomes Branch, DHCS  Cost monitoring and reporting are essential components of the work of county behavioral health fiscal managers. This session will be geared for fiscal managers of mental health or SUD services to assist them in maintaining better financial control of the program costs within their agencies. DHCS will respond to specific questions asked by participants and will share some best practices and recommendations for timely and accurate cost reporting. This session will take a closer look at Funding Sources/Allocations and the various funding sources available to the counties for the provision of Mental Health and SUD services.	Camellia Room
2:15 PM	<b>BREAK</b>	

## TUESDAY, JUNE 4, 2019, CONTINUED

- 2:30 PM **MENTAL HEALTH & SUD COST REPORTING: PART 2** Camellia Room  
**Chuck Anders**, Chief, Mental Health Management and Performance Outcomes Branch, Mental Health Services Division, DHCS  
**Moses Ndungu**, Chief, Fiscal Policy Section, Mental Health Management and Performance Outcomes Branch, DHCS  
In the second part of this presentation from DHCS, we will discuss how interim rates are determined and applied to claims. There will also be a review of the different federal and/or state policies, regulations and statutory requirements identifying strategies of how counties can allocate program costs. This will include a high-level overview of cost settlement principles.
- 3:45 PM **BREAK**
- 4:00 PM **ANNUAL REVENUE AND EXPENDITURE REPORTS** Camellia Room  
**Chuck Anders**, Chief, Mental Health Management and Performance Outcomes Branch, Mental Health Services Division, DHCS  
**Donna Ures**, Chief, MHSA Oversight and Fiscal Reporting Section, DHCS  
**Brian Sala, PhD**, Deputy Director for Evaluation and Program Operations, Mental Health Services Oversight and Accountability Commission (MHSOAC)  
During this panel presentation, representatives from State agencies will provide updates regarding the MHSA Annual Revenue and Expenditure Report (ARER). There will also be an opportunity for counties to discuss concerns and challenges associated with submitting the ARER in a timely and accurate manner.
- 4:45 PM **REVIEW INSTITUTE DAY 1 AND DEVELOP QUESTIONS FOR TOMORROW'S MENTORING SESSION** Camellia Room  
**Kristy Kelly, MA, MFT**, Consultant, CIBHS  
**Beth Conley, MPA**, To The Point Facilitation, Inc.
- 5:00 PM **ADJOURN**

5:15 PM–6:30 PM **NETWORKING RECEPTION**

Glide's Market Area

CIBHS is excited to host our first ever Networking Reception! We invite you to join us in the Glide's Market Area on the street level of the hotel. Take advantage of this opportunity to network with your county partners in a relaxed and comfortable environment. Light hors d'oeuvres will be provided.

**WEDNESDAY, JUNE 5, 2019** COUNTY-TO-COUNTY

8:15 AM	<b>REGISTRATION/COFFEE/LIGHT CONTINENTAL BREAKFAST</b>	Camellia Foyer
9:00 AM	<b>WELCOME AND REVIEW OF DAY 1</b> <b>Kristy Kelly, MA, MFT</b> , Consultant, CIBHS	Camellia Room
9:15 AM	<b>A STORY OF RECOVERY</b> <b>Marcus Dancer</b> , Lived Experience Speaker, San Francisco County Mental Health Board Member  The day-to-day work of fiscal managers in the county behavioral health setting rarely brings them in contact with the people whose lives their work affects – that is, people who are receiving public mental health services, their families and caregivers. In this presentation, Marcus Dancer will describe the role of local County Behavioral Health Services in his journey to recovery.	Camellia Room
10:15 AM	<b>PUBLIC MENTAL HEALTH AND SUD/DMC FINANCING, ISSUES AND UPDATES + Q&amp;A</b> <b>Gary Ernst</b> , Administrative and Fiscal Mental Health Consultant <b>Mike Geiss</b> , Geiss Consulting <b>Paula Wilhelm</b> , Senior Policy Analyst, CBHDA  County behavioral health fiscal leaders need as much information as possible to effectively manage resources and budget in the face of significant changes in health care delivery and behavioral health financing. The Panelists will describe the major behavioral health funding streams focusing on mental health and Substance Use Disorder/Drug Medi-Cal, provide updates on important developments, and discuss implications for counties from a fiscal perspective.	Camellia Room
11:45 AM	<b>“HOT” INFORMATION NOTICES</b> <b>Paula Wilhelm</b> , Senior Policy Analyst, CBHDA County Staff TBD  Another week, another new MHSUDS Information Notice! These frequent dispatches from DHCS contain mission-critical guidance for county mental health and substance use disorder programs. Presenters will highlight recent Information Notices with fiscal implications and participants will discuss questions, concerns, and next steps for implementation.	Camellia Room
12:30 PM	<b>LUNCH (included with registration)</b>	Camellia Room

## WEDNESDAY, JUNE 5, 2019, CONTINUED

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- 1:30 PM      **HOUSING THE HOMELESS AND CRIMINAL JUSTICE FUNDING  
RESOURCES: FISCAL IMPLICATIONS**      Camellia Room  
**Tyler Rinde**, Policy Analyst, CBHDA
- The State of California has made available an unprecedented amount of funding for homeless services and supportive housing in the last two years, much of which flows through counties. Additionally, there has been significant attention paid to the intersection of behavioral health and criminal justice, with significant proposals in the State Budget. This presentation will cover the financial aspects of these programs and what counties can expect.
- 2:15 PM      **BREAK**
- 2:30 PM      **COUNTY-TO-COUNTY PEER MENTORING SESSION**      Camellia Room
- This mentoring session provides opportunities for county staff to learn from each other. Experienced staff will answer questions and provide guidance and support to newer staff. Counties can hear about, and share their own best practices, successes and challenges.
- 3:45 PM      **REVIEW INSTITUTE DAY 2**      Camellia Room  
**Kristy Kelly, MA, MFT**, Consultant, CIBHS  
**Beth Conley, MPA**, To The Point Facilitation, Inc.
- 4:00 PM      **ADJOURN**

## Speakers' Biographies for 2019 Fiscal Leadership Institute

**CHUCK ANDERS** is the Chief of the Mental Health Management and Performance Outcomes Branch in the Mental Health Services Division at the Department of Health Care Services. Mr. Anders oversees the financial management functions of the Medi-Cal Specialty Mental Health Services waiver program, the data and analytic functions within the MHSD, and the Mental Health Services Act.

**BETH CONLEY** is President and CEO of To The Point Facilitation, Inc. (TTP). Her work demonstrates the ability to assess issues from the balcony, to create opportunities by networking resources, and to bring stakeholders together in coordinated efforts. Beth started this company to use her skills with graphic recording/facilitation along with her knowledge and experience in working across sectors to assist organizations and associations to achieve better outcomes.

**MICHELLE DOTY CABRERA** recently joined CBHDA as Executive Director. CBHDA represents the behavioral health directors from each of California's 58 counties, in addition to the City of Berkeley and the Tri-City Mental Health Center (Cities of Pomona, Claremont and La Verne). As the chief executive officer, she administers and manages the Association budget and staff, leads all advocacy efforts and relationships with stakeholders and partners, and is leading the efforts to negotiate a new Medicaid waiver (or contract with the federal government) as well as broader behavioral health transformation proposals that could substantially redesign and improve the service delivery system of behavioral health services in California.

Ms. Cabrera has a wealth of experience on state budget and policy as a legislative consultant and lobbyist. Prior to joining CBHDA she served as the Healthcare Director for the California State Council of the Services Employees International Union (SEIU California), where she advocated on behalf of healthcare workers and consumers, including SEIU California's county behavioral health workers.

She served as a Senior Consultant for the Assembly Human Services Committee, chaired at the time by Senator Jim Beall, where she specialized in child welfare issues; and served as a Program Officer for the California HealthCare Foundation.

Ms. Cabrera serves as a member on the National Quality Forum's Standing Committee on Disparities, which seeks to reduce and eliminate health disparities through quality measurement. She serves on the Board of Directors of the California Pan-Ethnic Health Network.

Ms. Cabrera recognizes that county behavioral health is at a critical crossroads and she is working alongside California's Behavioral Health Directors to lead CBHDA by leveraging the experience and talent of California's county behavioral health systems to improve access to quality services for all Californians living with mental illness and substance use disorders.

**MARCUS DANCER** is a member of the San Francisco Mental Health Board and an Associate Minister at the Golden Gate Church of Christ. He speaks frequently at Crisis Intervention Trainings throughout California, sharing his story of recovery. He compassionately serves his community by supporting those suffering from co-occurring mental health and substance use disorders.

**GARY ERNST** has been an Administrative and Fiscal Mental Health Consultant for over 18 years working within different counties in California. He is also a trainer with MAXIMUS, Inc. a national consulting firm where he directs training on SB 90 claiming and Mental Health Cost Reporting for county mental health programs. As a previous director in San Benito County, Gary brings a wealth of knowledge and understanding of fiscal responsibilities.



**MICHAEL R. GEISS** is the founder of Geiss Consulting, a Sacramento-based management consulting firm. He has over thirty years' experience providing services to public sector agencies. Prior to establishing Geiss Consulting, he had over nine years management consulting experience with NewPoint Group and seven years with Ernst & Young. He specializes in financial and economic analyses, business process improvement and operations analyses. Mr. Geiss has managed and participated in over one-hundred separate engagements for various State of California and other government entities, including more than twenty projects for the California Department of Mental Health, numerous projects for more than 42 county mental health agencies in California, and various projects for the California Behavioral Health Directors' Association and the California Institute for Behavioral Health Solutions.

**RICK GOSCHA** is Senior Vice President for the California Institute for Behavioral Health Solutions. Dr. Goscha has over 30 years of experience in behavioral health including provision of clinical services, supervision and program management, agency executive leadership, research and evaluation, and policy development. Dr. Goscha previously worked as the Director for the University of Kansas Center for Mental Health Research and Innovation, recognized nationally and internationally for their work around the Strengths Model and other recovery-oriented, evidence-based practices for people with serious mental illnesses. Dr. Goscha's extensive work around building systemic infrastructures that support recovery-oriented practices, enhancing skill-development through field mentoring, making use of data to guide program improvement efforts, and using client-centered leadership practices, have translated to positive outcomes for behavioral health organizations.

**MOSES NDUNGU** oversees the Fiscal Policy Section of the Mental Health Management and Performance Outcomes Branch in the Mental Health Services Division at the Department of Health Care Services. The section administers the Short-Doyle Medi-Cal Mental Health Plan cost reporting and federal grant management programs. Moses graduated from Grand Valley State University, Michigan in 2007 with a Bachelor of Business Administration Degree with a concentration in Finance.

**TYLER RINDE** is a Policy Analyst for County Behavioral Health Directors Association (CBHDA). Tyler is responsible for assisting CBHDA's legislative work and staffing CBHDA's Legislative Committee. In addition to this role, Tyler staffs Criminal Justice policy and assists with Housing and Homelessness policy for CBHDA. Before joining CBHDA, Tyler was an Executive Legislative Intern with Senator Anderson in his district office in El Cajon, California. Tyler has a BA from University of California, San Diego in political science.

**BRIAN SALA** has served as Deputy Director for Evaluation and Program Operations at the Mental Health Services Oversight and Accountability Commission (MHSOAC) since the fall of 2015. In that capacity, he oversees strategic development of oversight of mental health outcomes and programs statewide, with emphases on improving public understanding of trends and gaps in the public mental health system. During 2009-15, he served as assistant director and then acting director of the California Research Bureau, a public policy research bureau of the California State Library. Prior to joining the State, he served on the faculties of the University of Illinois at Urbana-Champaign and the University of California at Davis. He holds a Ph.D. in Political Science from the University of California at San Diego.

**PAULA WILHELM** joined CBHDA as a Senior Policy Analyst in the spring of 2017, and is responsible for SUD-focused legislative and policy projects as well as housing and workforce issues. Recent areas of focus include the Drug Medi-Cal Organized Delivery System waiver, youth SUD treatment, and the implementation of federal managed care and parity regulations by county alcohol and drug programs. Prior to her time with CBHDA, Paula worked in administration and fundraising for Women's Community Clinic of San Francisco. Paula holds master's degrees in Public Policy and Public Health from UC Berkeley.

**DONNA URES** is the Chief of the MHSA Oversight and Fiscal Reporting Section at the Department of Health Care Services. She has a Bachelor's degree in Psychology from California State University, Sacramento.

# CIBHS COUNTY BEHAVIORAL HEALTH FISCAL LEADERSHIP INSTITUTE PLANNING COMMITTEE

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