



**ONSITE
PROGRAM**

County Behavioral Health Fiscal Leadership Institute

December 12-13, 2016

Doubletree by Hilton Sacramento
2001 Point West Way
Sacramento, California 95815

December 12, 2016

Dear Fiscal Leadership Institute Attendees,

Welcome to the tenth 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 policy in counties of all sizes throughout California.

As ever, the Institute brings together the foremost experts in the field to give you the latest information on behavioral health care fiscal policy and practice. Please use our time together to get answers to the tough questions you face back home. With the recent election, we are on the path to significant changes in the resources available to counties, including the potential unraveling of the Affordable Health Care Act. Clearly these are moving targets, and ongoing attention and advocacy will be required. We know you will be asked to provide expert advice at the local level, and it is our intention to provide you with the best possible information to be able to do so.

With these major initiatives bringing fiscal and administrative changes to counties, this Institute is well-timed to serve as a forum to share your experiences - successes as well as challenges - and hear from leading experts in the field.

CIBHS would like to acknowledge Donna Wigand, MSW, former Mental Health Director for Contra Costa County and Chair of the Fiscal Committee for CMHDA (new CBHDA) who has stepped away from her role of planning and facilitating this Institute. Donna was the original visionary of the Institute. She understood intimately that if the money does not work as it should for counties, services are always at risk we thank Donna for this legacy.

You will find all of the Institute presentations and materials on the CIBHS website at this link:
<http://www.cibhs.org/conference/county-behavioral-health-fiscal-leadership-institute>

Again, welcome!



Sandra Naylor Goodwin, PhD, MSW
CEO and President, CIBHS



Kristy Kelly, MFT
CIBHS Consultant

MONDAY, DECEMBER 12, 2016

- 9:15 AM **REGISTRATION**
- 10:00 AM **WELCOME AND INTRODUCTIONS**
Kristy Kelly, MA, MFT, Consultant, California Institute for Behavioral Health Solutions (CIBHS)
- 10:15 AM **OPENING REMARKS**
Sandra Naylor Goodwin, PhD, MSW, President and CEO, CIBHS
Kirsten Barlow, MSW, Executive Director, County Behavioral Health Directors Association of California (CBHDA)
- 10:30 AM **POLICY UPDATES FROM THE DEPARTMENT OF HEALTH CARE SERVICES**
Karen Baylor, PhD, LMFT, Deputy Director, Mental Health and Substance Use Disorder Services, Department of Health Care Services (DHCS)
Dina Kokkos-Gonzales, Chief, Program Policy & Quality Assurance Branch, Mental Health Services Division, DHCS

This session will address emerging behavioral health policy developments from a state perspective and their potential fiscal implications for county behavioral health agencies.
- 11:30 AM **PATHWAY TO RECOVERY: A PERSONAL JOURNEY OF HOPE AND HEALING**
JDD Doran-Jammer, Mental Health America of Northern California

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. JDD will share his personal journey to recovery and highlight his experiences with MHSA funded and other services provided through the public mental health system. His presentation will provide fiscal managers with an understanding of how the work they do truly supports the recovery of many individuals.
- 12:00 PM **SMALL GROUP EXERCISE**
Beth Conley, MPA, The Kiely Group
- 12:15 PM **LUNCH** (included with registration)
- 1:15 PM **DIALOGUE ON KEY ISSUES FACING COUNTIES**
Kristy Kelly, MA, MFT, Consultant, CIBHS
Beth Conley, MPA, The Kiely Group

This session will be a facilitated county-to-county discussion focused around the key issues currently facing county behavioral health agencies. This session will offer participants the opportunity to bring up questions and have a conversation with their peers around particular behavioral health fiscal topics of concern to the counties.

MONDAY, DECEMBER 12, 2016 continued

1:45 PM

UPDATES FROM THE CBHDA FINANCIAL SERVICES COMMITTEE, FINANCIAL ANALYSIS AND REVIEW SUBCOMMITTEE (FARS)

Kara Anguiano, Fiscal Manager, Stanislaus County Behavioral Health and Recovery Services

Melissa Chilton, Budget Specialist, Mental Health Branch, County of Humboldt, Department of Health and Human Services

Joe Zamora, MPA, Assistant Behavioral Health Director, Riverside University Health System - Behavioral Health

Michele Bennyhoff, MPH, Deputy Executive Director, CBHDA

Panelists will describe FARS' purpose and some of its successes and challenges to-date. The session will include a presentation and discussion of several issues FARS has examined in-depth, including MHSOAC's Fiscal Reporting Data Visualization Tool, MHSA Annual Revenue and Expenditure Report (ARER), development of fiscal regulations related to MHSA, and fiscal impacts of Continuum of Care Reform (CCR).

2:15 PM

PUBLIC BEHAVIORAL HEALTH CARE FINANCING

Kirsten Barlow, MSW, Executive Director, CBHDA

Mike Geiss, Founder, Geiss Consulting

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, provide updates on important developments, and discuss implications for counties from a fiscal perspective.

3:00 PM

BREAK

3:15 PM

FISCAL IMPLICATIONS OF CROSS COUNTY RESOURCE SHARING

Mary Adèr, MPP, MPH, Deputy Director, Legislative Affairs, CBHDA

AB 1299 provides for the presumptive transfer of responsibility for providing or arranging for mental health services to a foster child from the county of original jurisdiction to the county in which the foster child resides. While counties that pay or have paid for specialty mental health services for foster children placed out of county are supposed to be fully reimbursed within the fiscal year the services are provided, the process can be complicated. This session will present the fiscal implications of AB 1299 for counties, and provide county fiscal staff with some examples of ways in which this issue is being addressed across the state.

MONDAY, DECEMBER 12, 2016 continued

3:45 PM

PROPOSITION 64

Thomas Renfree, Deputy Director, Substance Use Disorder Services, CBHDA

Victor Kogler, Vice President, CIBHS

This session will provide an overview of the recently passed California legislation Proposition 64 which legalized recreational marijuana use and created a new funding stream for public behavioral health services. The Adult Use of Marijuana Act imposes a 15% excise tax on all marijuana sales. The LAO estimates that annual tax revenue will exceed \$1 billion. After specific set-asides, sixty percent of this revenue is earmarked for youth substance abuse prevention, treatment, and education services. Panelists will explain the revenue expectations and ways in which counties can access and use these anticipated funds.

4:15 PM

REVIEW INSTITUTE DAY 1 HIGHLIGHTS

Kristy Kelly, MA, MFT, Consultant, CIBHS

Beth Conley, MPA, The Kiely Group

4:30 PM

ADJOURN DAY 1

Presentations & Handouts and can be found at:

www.cibhs.org/event/2016-behavioral-health-fiscal-leadership-institute

TUESDAY, DECEMBER 13, 2016

9:00 AM

WELCOME

Kristy Kelly, MA, MFT, Consultant, CIBHS

9:05 AM

DRUG MEDI-CAL WAIVER RATE SETTING

Don Braeger, Division Chief, Substance Use Disorder Program, Policy and Fiscal Division, DHCS

Patrick Daglia, Branch Chief, Fiscal Management and Accountability Branch, Substance Use Disorder Program, Policy and Fiscal Division, DHCS

Clara Boyden, AOD Administrator/Health Services Manager, San Mateo County Behavior Health & Recovery Services

Bruce Copley, MA, Director, Santa Clara County Alcohol and Drug Services Department

Thomas Renfree, Deputy Director, Substance Use Disorder Services, CBHDA

Victor Kogler, Vice President, CIBHS

The Drug Medi-Cal Organized Delivery System (DMC-ODS) is a pilot program to test a new paradigm for the organized delivery of health care services for Medi-cal eligible individuals with substance use disorder. This session will provide practical information related to rate setting for counties opting-in to the ODS pilot implementation. Panelists from DHCS will provide an overview of the rate setting process. Panelists representing three different counties will discuss how they each approached setting rates and addressed potential risks. Subject Matter Experts from DHCS, CBHDA and CIBHS will join the panelists for a moderated Question and Answer period.

10:30 AM

A REGIONAL MODEL FOR DRUG MEDI-CAL (DMC) EXPANSION: WORDS FROM THE NORTH COUNTRY

Jim Featherstone, LCSW, Consultant

Two years ago, eight rural Northern California Counties (Del Norte, Siskiyou, Modoc, Humboldt, Trinity, Shasta, Lassen and Mendocino) approached the Partnership Health Plan of California to request its assistance in creating a regional response to the State Pilot for DMC Expansion. The preparation work has included on-site program visits to county programs, nonprofit providers and federally qualified health care centers. Lead by a Steering Committee of Health and Human Services Directors, Technical Work Groups, provider meetings and negotiations with DHCS, these eight counties in the far north region of the State are preparing the first Regional Implementation Plan that features an alternative financial structure. This session will present the components of this unique Regional Model and discuss the proposed alternative financial structure between the Health Plan and the Counties.

TUESDAY, DECEMBER 13, 2016 continued

11:15 AM

SHARING RISK AND VALUE: CONTRACTING OPPORTUNITIES

Don Kingdon, PhD, Principal, Behavioral Health Integration, Harbage Consulting

Mike Geiss, Founder, Geiss Consulting

In this session, participants will be presented with information regarding current opportunities to increase the value of sub-contractor services from a Medi-Cal beneficiary experience, delivery system improvement and a financial risk perspective. The information provided is intended to strengthen the role of the county Mental Health Plan (MHP) as a prudent purchaser of services consistent with federal healthcare program requirements. Presenters will provide information and examples that highlight the importance of tracking delivery system results using trend analysis. The presenters will demonstrate how these trends can then be transformed into value based purchasing baseline and goals information for purchasing purposes. Participants will be encouraged to apply the information provided to their roles as county fiscal officers and staff, creating important links between purchasing and value that benefit those they are responsible for serving.

12:00 PM

LUNCH (included with registration)

12:45 PM

WHOLE PERSON CARE PILOTS AND THE HEALTH HOME PROGRAM

Molly Brassil, MSW, Director, Behavioral Health Integration, Harbage Consulting

This session will describe the major components of the California's Whole Person Care pilot program, including its relationship to furthering local efforts to improve beneficiary care in the Medi-Cal program. This session will also describe the major components of California's Health Home Program, including its relationship to the existing managed care infrastructure. The session will include a discussion of timeframes, including regional phases for implementation and demonstration timelines, and fiscal considerations relevant for both programs.

1:15 PM

THE FINANCIAL IMPLICATIONS OF HIPAA COMPLIANCE AND NON-COMPLIANCE: AN ASSESSMENT OF COSTS AND BENEFITS

Thad Dickson, PMP, CPHIM, CEO and President, Xpio Health

There can be steep financial consequences for HIPAA non-compliance for counties and their community-based contractors. This session will cover the costs, likelihood and anatomy of different types of breach events. The presenter will offer prudent and affordable strategies for maximizing the ROI on different technical security measures. Participants will also learn about the OCR desk audit process, agency responsibilities, and business case for prudent risk management.

2:00 PM

BREAK

2:15 PM

QUESTIONS AND ANSWERS ON PUBLIC BEHAVIORAL HEALTH FINANCING

Kirsten Barlow, MSW, Executive Director, CBHDA

Mike Geiss, Founder, Geiss Consulting

3:15 PM

REVIEW INSTITUTE DAY 1 AND 2 HIGHLIGHTS

Kristy Kelly, MA, MFT, Consultant, CIBHS

Beth Conley, MPA, The Kiely Group

3:30 PM

ADJOURN

SPEAKERS' BIOGRAPHIES FOR 2016 FISCAL LEADERSHIP INSTITUTE

MARY ADÈR, MPP, MPH has been the Deputy Director, Legislative Affairs at the County Behavioral Health Directors Association of California (CBHDA) since the spring of 2016. Prior to CBHDA she served as Senior Advisor for Government Relations at Kaiser Permanente's national headquarters in Oakland, California. For five years she provided substantive and strategic guidance on legislation in California, Hawaii, and Georgia. Prior to joining Kaiser Permanente, Mary served for ten years as senior staff to California legislative leadership at the Assembly Appropriations Committee and the non-partisan Legislative Analyst's Office. Mary's areas of expertise include legislative analysis and writing, assessment of impacts of legislation and public finance. Mary holds a Master of Public Health and a Master of Public Policy from the University of California at Berkeley and a Bachelor of Arts in Psychology from Dartmouth College.

KARA ANGUIANO brings more than 24 years in diverse financial, managerial and governmental accounting experience to her role as a Fiscal Manager for Stanislaus County Behavioral Health and Recovery Services. Kara is a member of the Financial Analysis and Review Subcommittee (FARS) for the California Behavioral Health Directors Association (CBHDA) Financial Services Committee. She earned her Bachelor of Science in Accounting degree from Post University in Waterbury, Connecticut.

Kara is dedicated to helping organizations achieve fiscal sustainability by helping them establish practical, sound and transparent financial processes. Focused on mental health and substance use disorder services, she is committed to delivering financial services that meet Stanislaus County's unique needs. Kara specializes in budgeting, forecasting, variance analysis, management reporting and business process improvement.

CLARA BOYDEN has over fifteen years of experience in administering health programs in the San Mateo County Health System. As the Alcohol and Drug Services Administrator within San Mateo County Behavioral Health & Recovery Services, she leads the planning for the Drug Medi-Cal Organized Delivery System services; building on her work with the Low Income Health Program Bridge to Reform Waiver, where she designed the SUD benefit and services system. Clara recently developed and implemented a state of the art medication assisted treatment program, embedding SUD counselors/case managers in primary care clinics and the emergency department seven days a week and opening a new specialty clinic to serve high utilizers of emergency services with SUD in San Mateo County.

Previously, Clara spent several years working in the non-profit sector, where she was the Women's Health Program Manager for the National Organization for Women, coordinated community outreach and political advocacy campaigns for the Sierra Club and other environmental groups, and worked with transition aged youth and the Federal Job Corp program. Clara's areas of interest are in building system level change to support individual and community health, promoting health equity, and advancing social and economic justice. She has a Bachelor's Degree from UC Berkeley.

KIRSTEN BARLOW, MSW began serving as Executive Director of the County Behavioral Health Directors Association (CBHDA) of California in October 2015. The prior year Kirsten worked as Executive Officer of the Council on Mentally Ill Offenders, a position to which she was appointed by Governor Edmund G. Brown, Jr. The Council on Mentally Ill Offenders develops strategies for keeping youth and adults with mental illness out of the criminal justice system. Between 2009 and 2014, Kirsten was Associate Director at CBHDA, where she directed the Association's legislative and budget advocacy efforts. Prior positions included serving as public information officer at the California Department of Mental Health, legislative advocate and information officer for the Los Angeles County Department of Mental Health, and Principal Consultant to the California State Assembly Committee on Human Services under the leadership of former Assemblywoman Dion Aroner (D-Berkeley). She earned her Masters of Social Welfare degree in management and planning from the University of California - Berkeley and her Bachelor's degree in psychology from the University of Michigan - Ann Arbor.

KAREN BAYLOR, PHD, LMFT was appointed as the Deputy Director of Mental Health and Substance Use Disorders for the Department of Health Care Services on June 12, 2013. She previously was the Behavioral Health Administrator for the County of San Luis Obispo for the past eight years. During her time in San Luis Obispo County, she served as President of the California Mental Health Directors Association during 2012. She also served as a Board Officer for the California Mental Health Services Authority from 2010 to 2013. Her previous work experience was with a variety of private, non-profits organizations providing children's mental health services. She has a Ph.D. in Clinical Psychology and is a Licensed Marriage and Family Therapist.

MICHELE BENNYHOFF, MPH began serving as the Deputy Executive Director for the County Behavioral Health Directors Association of California (CBHDA) in the spring of 2016. In her role with CBHDA, Michele assists Kirsten Barlow, the Executive Director, in managing the organization's operations and resources, as well as works directly with the Board, members, and committee participants to ensure effective strategies are utilized to accomplish the Association's mission. Prior to joining CBHDA, Michele was the Association Director for the California Council of Community Mental Health Agencies (CCCBHA) for five years. Her work at CCCBHA focused on administering the association through development and execution of an annual program to advance the association objectives defined through an annual work plan developed with the Board of Directors and nine committees under her direction. Between 2007 and 2012, Michele was the associate director of community health programs at the Center for Health Improvement. Her career path has also included work with AmeriCorps, Peace Corps, and the United Nations Population Fund. Michele has a Master's in Public Health from Tulane School of Public Health and Tropical Medicine.

DON BRAEGER is the Division Chief of the Substance Use Disorder (SUD) Program, Policy, and Fiscal Division with the California Department of Health Care Services and has over 10 years of experience working with healthcare policy and programs at the State. During his tenure, he has worked in a variety of positions under the California Health and Human Services agency and has been responsible for the formulation and implementation of a broad spectrum of statewide health policy, program, and fiscal initiatives. Don brings his experience in the SUD field and has responsibility for the statewide administration of program policy and development in the prevention, treatment, and recovery system. He currently oversees the Drug Medi-Cal program, Substance Abuse Prevention Treatment Block Grant, and discretionary grants. Don received his B.A. in Public Administration from the University of San Francisco.

MOLLY BRASSIL, MSW has over a decade of health policy experience, with a focus on behavioral health integration and delivery system improvement in California's Medicaid (Medi-Cal) Program. Molly joined Harbage Consulting in 2015 and is currently the Director of Behavioral Health Integration.

Before joining Harbage Consulting, Molly served from 2011 to 2015 as the Director of Public Policy for the County Behavioral Health Directors Association of California (CBHDA). In her role with CBHDA, Molly led efforts to implement the Association's public policy agenda, including leading advocacy efforts to inform California's implementation of the Affordable Care Act to assure access to a robust continuum of behavioral health care for Medi-Cal beneficiaries and low-income individuals purchasing coverage through Covered California, the State-Based Marketplace.

Additionally, Molly worked with state and county leadership to develop the terms and conditions for the "Drug Medi-Cal Organized Delivery System" pilot program – a section 1115 waiver that was granted approval by the Centers for Medicare and Medicaid Services (CMS) in 2015.

Before joining CBHDA, Molly served from 2006 to 2011 as a Deputy Director for the California Primary Care Association (CPCA), the trade association representing over 1000 community clinics and health centers in California. In her role with CPCA, Molly led the Association's regulatory affairs agenda, including developing and implementing strategies to reduce policy barriers in the areas of health center (Federally Qualified Health Center) financing, facility licensing, and provider enrollment in public payer programs.

Molly received her undergraduate degree in anthropology and global studies from the University of California, Santa Barbara and received her Master of Social Work from Sacramento State University. In her spare time, Molly enjoys camping and hiking throughout beautiful Northern California with her husband and two young children.

MELISSA CHILTON, Budget Specialist for Humboldt County Department of Health and Human Services has 15 years of financial management expertise in county Behavioral Health. Melissa is co-chair of the California Behavioral Health Directors Association Financial Analysis and Review Subcommittee (CBHDA-FARS). This subcommittee of CBHDA Financial Services advises on matters that directly concern county behavioral health programs.

BETH CONLEY, MPA is the Vice President, Government and Nonprofit Relations for the Kiely Group (KGI). She brings the ability to assess issues from the balcony, to create opportunities by networking resources, and to bring stakeholders together in collaborative efforts. Beth has worked for the KGI for four years. Her work includes projects with California Network of Mental Health Clients, Cal-Neva Community Action Partnership, San Diego County, CalMHSA, Maravilla Foundation, HumpAL (Partnership between RCAA and Humboldt County Public Health), and University of Southern California School of Policy, Planning, and Development. She was faculty on the Sierra Health Foundation Health Leadership Program. Beth specializes in mapping and analyzing organizational and personal networks for KGI's Rel8™ program. Additionally, she coordinates the technical use of KGI's proprietary narrative analysis software and oversees most of the day-to-day functions of the organization. Beth received her MPA from the University of Southern California (USC). While at USC (both as a graduate student and as a consultant after graduating), she coordinated leadership programs for health care executives and mental health directors. She did her undergraduate work at Butler University in Indianapolis. Her other work experience includes project management on a software development project, and technology support for small businesses.

BRUCE COPLEY, MA was the Deputy Director of the Santa Clara County Mental Health Department for over nine years. In this capacity, he was responsible for the operations of all services delivered both within the county clinics and through community based organizations. With the inception of the Mental Health Services Act, he was actively involved in the development of new and innovative treatment, intervention and prevention services. These included the development of a residential criminal justice program; aftercare services for the juvenile justice population; a robust consumer and peer counselor program; and a redesign of the adult and older adult system of care on the philosophy of "Wellness and Recovery."

Prior to his tenure with the Mental Health Department, he was the Deputy Director of the Santa Clara County Department of Alcohol and Drug Services for fourteen years. Some of his service implementations included; the first public managed care system of substance abuse in California; development of service for the Substance Abuse Treatment Court; an integrated system of care in collaboration with the Mental Health, Public Health and the Social Services Agency for Cal-Works participants; and an in-depth trauma study of incarcerated juveniles that resulted in recommendation for standardize assessment of trauma and the development of trauma focused therapy.

On May 1, 2012, he was appointed as the Director of the Santa Clara County Alcohol and Drug Services Department (DADS). Presently DADS and the Mental Health Department are formally integrating into the Department of Behavioral Health Services. He and his staff are working collaboratively with MHD staff to design a comprehensive integrated department.

PATRICK DAGLIA is the Branch Chief of the Fiscal Management and Accountability Branch (FMAB) under the Substance Use Disorder (SUD) Program, Policy, and Fiscal Division with the California Department of Health Care Services. Patrick's primary responsibilities include managing, directing, planning, and controlling all activities related to the Drug Medi-Cal (DMC) and non-DMC claim reimbursement process, annual cost report settlement, Substance Abuse Prevention and Treatment Block Grant allocations, and the annual rate development for SUD services. Patrick has 18 years of experience in the financial industry and holds a bachelor's degree in Finance from California State University, Sacramento.

THAD DICKSON, PMP, CPHIM is CEO of Xpio Health and a frequent contributor to the behavioral healthcare technology and compliance conversation both in CA and across the US. Thad works with organizations across the country to leverage technology to improve patient care, access, and outcomes and, along with a growing team of talented associates, assists with the interpretation and application of healthcare regulation, policy, and law as it relates to the behavioral healthcare field.

JDD DORAN-JAMMER was born in Santa Cruz, CA, and attended California State University at Sacramento. He currently volunteers at the Consumer-Operated Warmline, a program of Mental Health America of Northern California, funded by Sacramento County. Mr. Doran-Jammer has been speaking on the topic of disability awareness for about the last 10 years. He is involved in the Stop Stigma Sacramento Speakers Bureau and the Consumers Speak Conference. He brings his experiences in the foster care system, with the public behavioral health system, and with being visually impaired to his work and in helping others. Using his personal experiences to help others, his own journey is leading him toward a fulfilling career path within the field of community mental health.

JIM FEATHERSTONE, LCSW is the retired Assistant Director of the Napa County Health and Human Services Agency where he held this title since 1995. In that role he was responsible for the administration and management of the integrated services of Health, Substance Abuse, Mental Health and Social Services. His 35 years in the field of human services includes street outreach in San Francisco's Tenderloin, school social work, forensics, mental health, protective services, emergency medical services, housing development, disaster response and substance abuse. He has also provided program development in a variety of areas and disciplines. Mr. Featherstone has been a lecturer at the University of California at Berkeley School of Social Work, an instructor with the Executive Development Training Program of BASSC, is a trainer in crisis intervention and management of assaultive behavior. He served two terms as the President of the California Mental Health Directors Association. As a consultant for Napa

County he spearheaded the effort to create an integrated health care clinic to include mental health and substance use clients on the site of Napa County's Health and Human Services campus. He has worked with both Marin and Plumas County to assist with the integration of mental health and substance abuse. He currently provides consultation to the Partnership Health Plan of California. This effort includes the development of an 8 county regional plan for Drug Medi-Cal Expansion as well as the expansion of medical assisted treatment with federally qualified health care centers. Mr. Featherstone earned his Master of Science from Columbia University in 1974 and is a licensed clinical social worker.

MICHAEL R. GEISS is the founder of Geiss Consulting, a Sacramento-based management consulting firm. He has over twenty-nine 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 26 county mental health agencies in California, and various projects for the California Behavioral Health Directors' Association and the California Institute for Behavioral Health Solutions.

SANDRA NAYLOR GOODWIN, PHD, MSW is the founding President and CEO of the California Institute for Behavioral Health Solution (CIBHS), and has 30 years of professional experience in the behavioral health field. This experience includes administration, treatment, service methodologies, planning and policy development at the county and state levels. Dr. Goodwin is currently developing strategies for implementation of health care reform as it applies to behavioral health. This body of work includes focus on the bi-directional integration of mental health, substance use and primary healthcare. Over the last several years CIBHS has been responsible for policy development, training and technical assistance to support the Mental Health Services Act (Proposition 63), which California voters passed in November 2004. The MHS Act focuses on transformation of mental health services, by concentrating on recovery, resiliency, cultural competency, and reduction of disparities. As principal consultant to the Assembly Health Committee of the California Legislature, Dr. Goodwin was influential in development of several pieces of fiscal and program reform legislation, including mental health realignment, Medi-Cal consolidation, the California Mental Health Master Plan, and California compliance with the ADA. Dr. Goodwin previously was a practicing clinician and director of mental health and alcohol and drug abuse for Placer County. She holds a B.A. degree from California State University, Long Beach; an MSW degree from West Virginia University; and a PhD degree in clinical psychology from the Professional School of Psychology.

KRISTY KELLY, MA, MFT is a consultant in public behavioral health systems for the California Institute for Behavioral Health Solutions. Now retired from county service, she previously served as Mendocino County Mental Health Director, then as Lake County Behavioral Health Director, for a total of fourteen years. As a Small County Director, Kristy recognized the value of learning and networking at the State level, and actively participated with the California Mental Health Directors Association (CMHDA); California Institute for Mental Health (CIMH) and California Alcohol and Drug Program Administrators (CAADPAC). She assumed a number of leadership roles with CMHDA, serving as Chair of the Older Adults; Systems of Care and Small Counties committees. She was an ongoing member of the CMHDA Governing Board, ending with her terms as President, then Past President, of the Association. Kristy earned her undergraduate degree in humanities and mathematics at Southern Oregon University, Ashland and a Masters in Counseling Psychology at Sonoma State University. She has been licensed as a Marriage, Family and Child Therapist for nearly 40 years. Kristy began her administrative career as Executive Director of a private non-profit agency serving women and children. Over the years she developed and administered programs that focused on self-empowerment; taught psychology at the community college level; conducted a successful private practice and was elected to the Ukiah City Council.

DON KINGDON, PHD is Principal for Behavioral Health Integration at Harbage Consulting. Dr. Kingdon is a clinical psychologist and has worked in the private and public sectors providing mental health treatment and policy development for more than 20 years. He most recently worked for the California Mental Health Directors Association before moving to Harbage Consulting. He has extensive experience with mental health policy development at the county, state and federal levels.

VICTOR KOGLER is Vice President of the California Institute for Behavioral Health Solutions (CIBHS). Mr. Kogler has worked in the substance use disorder field in California since 1971. He served as Alcohol and Drug Program Administrator of Santa Barbara County for twenty years, is a past president of CADPAAC and was Executive Director of the Alcohol and Drug Policy Institute.

DINA KOKKOS-GONZALES is the Chief of the Program Policy & Quality Assurance Branch, within the Mental Health Services Division, at the Department of Health Care Services. Dina has been an integral member of the DHCS management team since 2005. As Chief of the Program Policy and Quality Assurance Branch, Dina oversees the administration and implementation of the Medi-Cal Specialty Mental Health Services Program in addition to other community mental health services. The Branch provides mental health subject matter expertise and technical assistance to mental health plans (MHPs) and other local mental health programs, as well as Ombudsman support to beneficiaries. It also analyzes, develops, and implements program changes related to mental health services required by state and federal legislation, including health care reform. In addition, the Branch serves as the liaison between the State and the Centers for

Medicare and Medicaid Services (CMS) in DHCS' role as the Single State Medicaid Agency. The Branch consists of the following sections: Policy, Quality Assurance, and Beneficiary and Litigation Support.

THOMAS RENFREE is the Deputy Director, Substance Use Disorder Services for the County Behavioral Health Directors Association of California. Previously he worked for and represented the County Alcohol and Drug Program Administrators Association of California (CADPAAC) for the twelve years. He began his work in the field as a legislative advocate for CADPAAC, and in 2006 he was asked to serve as Executive Director of the Association. In this role Mr. Renfree was active in statewide efforts to increase local government funding and support for both adult and adolescent alcohol and other drug prevention and treatment services. Mr. Renfree has a Bachelor's Degree in history and political science from the University of California. Among his leadership goals are a commitment to work toward better public understanding of substance use disorder issues, and a commitment to help advance public support for substance use disorder programs, their clients, and the workforce that directly provide prevention and treatment services.

JOE ZAMORA, MPA is the Assistant Behavioral Health Director for Riverside University Health System – Behavioral Health. Riverside University Health System provides services to Riverside County's more than two million residents across the County's 7,208 square mile geographic area. Mr. Zamora has been with Riverside University Health System and the formerly Riverside County Department of Mental Health for 18 years. He has held a variety of administrative and finance related positions over the years helping to support the County's Mental Health and Substance Abuse Treatment programs. He completed his master's degree in public administration in 2003 from California State University – San Bernardino.

CIBHS FISCAL LEADERSHIP INSTITUTE PLANNING COMMITTEE

**We thank the following individuals for their time and contributions as
Planning Team members:**

Beth Conley, MPA
Vice President
Government & Nonprofit Relations
The Kiely Group

Kirsten Barlow, MSW
Executive Director
County Behavioral Health
Directors Association of
California

Melissa Chilton
Budget Specialist
Humboldt County Department
of Health and Human Services,
Financial Services

Thad Dickson, PMP, CPHIMS
President & CEO
Xpio Health

Moses Ndungu
Chief
Fiscal Policy Section,
Fiscal Management and Outcomes
Reporting Branch, Mental Health
Services Division, DHCS

Leda Frediani
Director of Finance
Alameda County Behavioral
Health Care Services

Mike Geiss
Founder
Geiss Consulting

Kristy Kelly
Consultant
California Institute for Behavioral
Health Solutions

Don Kingdon, PhD
Principal
Behavioral Health Integration
Harbage Consulting

Victor Kogler
Vice President
California Institute for
Behavioral Health Solutions

Karen Kurasaki, PhD
Senior Associate
California Institute for
Behavioral Health Solutions

Shirley Martin
Fiscal & Administrative
Services Officer
Mono County Behavioral Health

Sharon Mendonca, MPA
Assistant Director
Merced County Behavioral Health
and Recovery Services

Tom Renfree
Deputy Director
Substance Use Disorder Services
County Behavioral Health
Directors Association of California

Shoshana Zatz
Associate
California Institute for
Behavioral Health Solutions

Bobbie Zawkiewicz
Project Support Specialist
California Institute for
Behavioral Health Solutions



2125 19th Street
Sacramento, CA 95818

Phone: 916.556.3480
Fax: 916.556.3478

CIBHS.ORG