



**ONSITE  
PROGRAM**

# County Behavioral Health Fiscal Leadership Institute

**December 11-12, 2017**

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

December 11, 2017

Dear Fiscal Leadership Institute Attendees,

Welcome to the Twelfth 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 and to get to know the people you can call on for information and support. Our agenda reflects the complexity of demands you face every day, and it is our intention to provide the information you need to make this work.

We are always delighted to welcome new participants to the Institute, and want you to know that there is a wealth of support for you amongst your colleagues here. You serve your county (and yourself) well by making connections. Please make good use of the County-to-County sessions!

Again, welcome!



Percy Howard III, LCSW  
Interim Chief Executive Officer, CIBHS



Kristy Kelly, MA, MFT  
CIBHS Consultant

## MONDAY, DECEMBER 11, 2017

- 9:15 AM      **REGISTRATION** (light continental breakfast included with registration) .....Salon D Foyer
- 10:00 AM      **WELCOME AND INTRODUCTIONS** ..... Salon D  
**Kristy Kelly, MA, MFT**, Consultant, California Institute for Behavioral Health Solutions (CIBHS)
- 10:15 AM      **OPENING REMARKS** ..... Salon D  
**Percy Howard III, LCSW**, Interim Chief Executive Officer, California Institute for Behavioral Health Solutions (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** ..... Salon D  
**Karen Baylor, PhD, LMFT**, Deputy Director, Mental Health & Substance Use Disorder Services, Department of Health Care Services (DHCS)  
**Dina Kokkos-Gonzales**, Chief Mental Health Services Division, DHCS  
**Brenda Grealish**, Assistant Deputy Director, Mental Health & Substance Use Disorder 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.
- 11:30 AM      **PUBLIC BEHAVIORAL HEALTH FINANCING**..... Salon D  
**Kirsten Barlow, MSW**, Executive Director, 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, provide updates on important developments, and discuss implications for counties from a fiscal perspective.
- 12:15 PM      **SMALL GROUP EXERCISE 1** ..... Salon D  
**Beth Conley, MPA**, President and CEO, To The Point Facilitation
- 12:30 PM      **LUNCH** (included with registration)..... Salon D
- 1:30 PM      **CONCURRENT BREAK-OUT SESSIONS**  
**Mental Health (Short-Doyle Medi-Cal) cost reports: Recent changes and their impact on the cost reporting process**..... Salon D  
**Jenkins Kumeh, CPA**, Chief of the Mental Health Plans Cost Reporting in Mental Health Services, DHCS  
This presentation will provide participants with an overview of the mental health cost report process, describe recent changes to the cost report and explain the resulting changes to the worksheets.

## MONDAY, DECEMBER 11, 2017, CONTINUED

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- 1:30 PM **CONCURRENT BREAK-OUT SESSIONS, continued**  
**Substance Use Disorder(SUD)/Drug Medi-Cal (DMC) Cost Reports**.....Terrace  
**Lanis Clark**, Section Chief within Audits and Investigation Division, DHCS  
**Abimbola Taiwo**, Health Program Auditor IV in the Financial Audit Branch-ADP Section, DHCS  
The presentation will provide a brief recap and general overview of the 2016-17 DMC Organized Delivery System (ODS) Waiver Program and encompass the new 2015-16 revised Cost Report for DMC and/or SAPT Block Grant Funding.
- 2:30 PM **BREAK**
- 2:45 PM **EQRO REQUIREMENTS AND PROCESSES** ..... Salon D  
**Rama Khalsa, PhD**, Director of DMC-ODC EQRO, Behavioral Health Concepts  
The External Quality Review Organization (EQRO) is a federal requirement of managed care plans including substance use disorders and mental health. There are many data and fiscal issues included in the EQRO process and requirements. An overview and some key documents will be discussed including the Information Systems Capacity Assessment and key data used to measure quality.
- 3:15 PM **DRUG MEDI-CAL** ..... Salon D  
**Tom Renfree**, Deputy Director, Substance Use Disorder Services, CBHDA  
**Victor Kogler**, Vice President, CIBHS  
California's implementation of the federal Section 1115 Waiver for Drug Medi-Cal provides additional federal and state funding for SUD treatment, and supports an organized delivery system that ensures access to a full continuum of care from assessment and early intervention to recovery supports. One of the changes in DMC financing has been the transition from a county of service to a county of responsibility model for adjudicating DMC claims. We will discuss the financial implications of this transition for counties given the responsibility of every county to ensure that all of its residents have access to the medically-necessary DMC services to which they are entitled.

Presentations and Handouts can be found at:

<https://www.cibhs.org/conference/county-behavioral-health-fiscal-leadership-institute-1>

## MONDAY, DECEMBER 11, 2017, CONTINUED

- 4:00 PM **A STORY OF RECOVERY** ..... Salon D  
**John Aguirre**, Assistant Advocacy Director, Access 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. Mr. Aguirre will share his personal journey to recovery as a consumer/ client and family member and highlight his experiences with mental health treatment 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 and the positive impact it has on the whole community.
- 4:45 PM **REVIEW INSTITUTE DAY 1** ..... Salon D  
**Kristy Kelly, MA, MFT**, Consultant, CIBHS  
**Beth Conley, MPA**, President and CEO, To The Point Facilitation
- 5:00 PM **ADJOURN**



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Your invitation is in this URL: <http://my.yapp.us/A5856T>. If you do not already have the Yapp on your iPhone or Android mobile device, you'll be directed to your app store to download the Yapp container app.

Once the Yapp is downloaded, open it, tap the “Download an Existing App” button and put this information into the screen: **A5856T**.

For those who don't have an iOS or Android mobile device, just click on this link in your computer's browser, <http://my.yapp.us/A5856T>, and the app will open in read only mode.

**TUESDAY, DECEMBER 12, 2017**

9:00 AM	<p><b>WELCOME</b>..... Salon D</p> <p><b>Kristy Kelly, MA, MFT</b>, Consultant, CIBHS</p>
9:10 AM	<p><b>UPDATES FROM THE CBHDA FINANCIAL SERVICES COMMITTEE, FINANCIAL ANALYSIS AND REVIEW SUBCOMMITTEE (FARS)</b> ..... Salon D</p> <p><b>Melissa Chilton</b>, Budget Specialist, Mental Health Branch, County of Humboldt, Department of Health and Human Services</p> <p><b>Kara Anguiano</b>, Fiscal Manager, Stanislaus County Behavioral Health &amp; Recovery System</p> <p><b>Leda Frediani</b>, Director of Finance, Alameda County Behavioral Health Care Services</p> <p><b>Sharon Mendonca</b>, Assistant Director, Merced County</p> <p>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 development of revisions to the MHSA Annual Revenue and Expenditure Report (ARER), development of fiscal regulations related to MHSA and fiscal impacts of Continuum of Care Reform (CCR) and DHCS cost report settlement policies.</p>
9:45 AM	<p><b>MAKING THE MONEY WORK - A DETAILED OVERVIEW OF COUNTY BEHAVIORAL HEALTH FINANCING</b>..... Salon D</p> <p><b>Shirley Martin</b>, Fiscal &amp; Administrative Services Officer, Mono County Behavioral Health</p> <p><b>Donna Thompson</b>, Senior Consultant, Privacy Consulting Group</p> <p>This overview of Behavioral Health funding is presented by the California Behavioral Health Administrators Association and will cover:</p> <ul style="list-style-type: none"> <li>• Behavioral Health Funding History</li> <li>• Realignment 1991 and 2011</li> <li>• Mental Health Services Act</li> <li>• Delivering Service Through Multiple Funding Sources</li> <li>• Community Mental Health Services Block Grant (MHBG) &amp; Projects for Assistance in Transition from Homelessness (PATH)</li> </ul>
10:45 AM	<p><b>BREAK</b></p>
11:00 AM	<p><b>CONCURRENT BREAK-OUT SESSIONS</b></p> <p><b>Small County Fiscal Issues</b> ..... Terrace</p> <p><b>Noel O’Neill, LMFT</b>, Agency Director, Trinity County Behavioral Health Services</p> <p>Developing local capacity for the Full-Service Partnership (FSP) consumer who has a need for a high level of intervention. Addressing fiscal concerns focused on the support and care line item in the county budget.</p> <p><b>Drug Medi-Cal(DMC)- Organized Delivery System(ODS)</b> ..... Salon D</p> <p><b>Tom Renfree</b>, Deputy Director, Substance Use Disorder Services, CBHDA</p> <p><b>Paula Wilhelm</b>, Senior Policy Analyst, CBHDA</p> <p>In this workshop we will discuss the opportunities and challenges for counties presented by the Drug Medi-Cal 1115 Waiver, as well as the fiscal changes created by the new parity and managed care requirements. We will also address some of the most common questions that have been submitted by counties and providers relating to DMC services.</p>

**TUESDAY, DECEMBER 12, 2017, CONTINUED**

12:00 PM	<b>BREAK</b>	
12:10 PM	<b>LUNCH</b> (included with registration).....	Salon D
1:00 PM	<b>SMALL GROUP EXERCISE 2</b> .....	Salon D
	<b>Beth Conley, MPA</b> , President and CEO, To The Point Facilitation	
1:15 PM	<b>THE 2017 AND 2018 CALIFORNIA LEGISLATIVE YEARS</b> .....	Salon D
	<b>Tom Renfree</b> , Deputy Director, Substance Use Disorder Services, CBHDA	
	<b>Mary Adèr, MPP, MPH</b> , Deputy Director, Legislative Affairs, CBHDA	
	We will review major legislation of interest to counties enacted in 2017, the federal landscape with respect to health issues and anticipated state and federal issues for 2018.	
1:45 PM	<b>BREAK</b>	
2:00 PM	<b>CONCURRENT BREAK-OUT SESSIONS</b>	
	<b>Mental Health Audits</b> .....	Terrace
	<b>Jeff Vogel</b> , Section Chief of the Specialty Mental Health Audits Section, DHCS	
	This session will cover Short/Doyle Medi-Cal related audits processing and backlog; Centers for Medicare & Medicaid Services (CMS) Final Rule regarding audit and transparency requirements; and compliance with federal Certified Public Expenditures requirements. Participants will have the opportunity to ask questions of DHCS staff.	
	<b>Audit Sessions</b> .....	Salon D
	<b>Lanis Clark</b> , Section Chief within Audits and Investigation Division, DHCS	
	<b>Abimbola Taiwo</b> , Health Program Auditor IV in the Financial Audit Branch-ADP Section, DHCS	
	This session will center around SD/MC cost report processing, and related audits backlog; CMS Final Rule regarding audit and transparency requirements; Compliance with federal Certified Public Expenditures requirements; SAPT Block Grant A-133 Audits and County/Provider DMC Contracts.	
3:00 PM	<b>BREAK</b>	
3:15 PM	<b>Q&amp;A ON PUBLIC BEHAVIORAL HEALTH FINANCING AND REVIEW INSTITUTE DAY 1 AND 2 HIGHLIGHTS</b> .....	Salon D
	<b>Kirsten Barlow, MSW</b> , Executive Director, CBHDA	
	<b>Kristy Kelly, MA, MFT</b> , Consultant, CIBHS	
	<b>Beth Conley, MPA</b> , President and CEO, To The Point Facilitation	
	Panelists will address questions from the audience related to information that has been shared over the past two days. The session will end with a review of Day 1 and 2.	
3:45 PM	<b>ADJOURN</b>	



**SPEAKERS' BIOGRAPHIES FOR 2017 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.

**JOHN AGUIRRE** has over 25 years' experience in nonprofit operational and fiscal management and grant writing and fundraising for community based and government organizations. Using his personal life and professional skills he has successfully managed projects and programs that promoted advocacy, prevention, stigma and discrimination reduction, intervention, and wellness and recovery in mental health, substance abuse and family violence arenas utilizing lived experience, education, best practices, and integration of private and public services while emphasizing collaboration of community stakeholders. Through his skills he has successfully sustained and expanded various programs through collaboration building, grant writing, and community engagement. John's strengths include excellent interpersonal skills and well developed human relation skills with the ability to interact successfully with people of all socioeconomic and cultural backgrounds. Mr. Aguirre currently provides statewide advocacy as the Assistant Advocacy Director through Advancing Clients & Community Empowerment Through Sustainable Solutions (ACCESS) a program of NorCal MHA funded by the California Mental Health Services Act (Prop 63) and is administered by the Mental Health Services Oversight and Accountability Commission (MHSOAC).

**KARA ANGUINAO** 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 degree in Accounting 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.

**KIRSTEN BARLOW, MSW** began serving as Executive Director of the County Behavioral Health Directors Association (CBHDA) of California in October 2015. The prior year Ms. Barlow worked as Executive Officer of the Council on Mentally Ill Offenders, a position to which she was appointed by Governor Edmund G. Brown, Jr.. Between 2009 and 2014, Ms. Barlow 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 Bachelors 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 eight years. During her time in San Luis Obispo County, she served as President of the California Mental Health Directors Association during 2012. Her previous work experience was in management at a variety of private, non-profits organizations providing children's mental health services. She has a PhD in Clinical Psychology and is a licensed Marriage and Family Therapist.

**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.

**LANIS CLARK**, has over 25 plus years of experience in Accounting in the public sector. He began his civil service career with Department of Alcohol and Drug Programs (ADP). Under Governor Brown's Executive order of 2013 that directed the merging and transitioning of ADP into Department of Health Care Services (DHCS), he now serves as the Section Chief within Audits and Investigation Division – Financial Audit Branch – Alcohol and Drug Section. He oversees twenty-one (21) staff performing financial and compliance audits of County and Providers covering the State of California.



Over the years, he has served on various Task Force and Committees that has directly influenced the operations of the Alcohol and Drug Field. He has provided training in all facets of Substance Use Disorder (SUD) cost reports audits and presented recommendations to Department Director while with ADP. Lanis graduated from Sacramento State University in 1991 with a Bachelor of Science Degree in Accounting.

**BETH CONLEY, MPA** is the President, 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. Prior to starting TTP, Beth worked for 9 years at the Kiely Group. She continues to work on projects for the Kiely Group, as an associate. Her work at the Kiely Group included projects with San Francisco Department of Public Health, Solano County Public Health, Los Angeles and Alameda Counties, 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. For these clients, she organized large amounts of data gathered from stakeholders, conducted focus groups, wrote Community Health Improvement Plans (CHIP), created graphics to illustrate the problem and solutions. Beth's work also included mapping and analyzing organizational and personal networks for KGi's Rel8™ program. Before her work at the Kiely Group, she was an Associate at California Institute for Mental Health (now California Institute for Behavioral Health Solutions) where she worked directly and/or had oversight for multiple simultaneous projects crucial to the implementation of Proposition 63 (Mental Health Services Act, or MHSA). In addition, she obtained and managed a \$680,000 annual contract with the State of California to provide training and technical assistance for the MHSA Housing Program. She was responsible for leading the development of a collaborative effort between CiMH and three key stakeholder organizations called "Working Well Together." Beth also chaired the Adult System of Care Training Steering Committee, which guided all training for AB2034 providers throughout California and the work was foundational to the work done with implementing new groundbreaking MHSA programs. Prior to moving to California for graduate school, Beth worked in Indianapolis, Indiana, where she managed the student services functions for the School of Public and Environmental Affairs at Indiana University – Indianapolis campus. For the eight years preceding that, she supervised housing and service programs for the largest public mental health provider Indiana.

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. Beth did her undergraduate work at Butler University in Indianapolis.

**BRENDA GREALISH**, was appointed Assistant Deputy Director for Mental Health and Substance Use Disorder Services within the California Department of Health Care Services in November 2014. As Assistant Deputy Director, Ms. Grealish is responsible for assisting the Deputy Director with the work under all of the mental health and substance use disorder divisions. Ms. Grealish began her state career with the Office of Statewide Health Planning and Development. She then worked at the Department of Mental Health for almost ten years in increasingly responsible positions. She has four years of management experience with the Department of Corrections and Rehabilitation during which she advanced from a Research Manager II to a Research Manager III, then to Deputy Director (Exempt) position within a less than three-year period. Prior to her appointment as Assistant Deputy Director, Ms. Grealish was the Chief, Mental Health Services Division. Ms. Grealish has a Bachelor's and Master's Degree in Psychology.

**PERCY HOWARD III, LCSW** is the Interim CEO for the California Institute for Behavioral Health Solutions. Over the past five years, Percy has been a key player and leader in California's drive to implement recovery-oriented and family-directed Evidence-Based Practice. During the course of his 32 year work history, Percy has worked for County Behavioral Health and Child Welfare Systems, Private healthcare providers, Non-Profit CBOs and in Juvenile Justice Settings. This experience has served him well in his current role as a leader in one of California's premier Training and Implementation and Systems Improvement Organizations. In his free time Percy is a competition licensed Racing Driver as well as a singer and composer who has recorded and performed with members of Living Color, King Crimson and Guns N Roses.

**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.

**RAMA KHALSA, PhD** is Director of DMC-ODS EQRO and a former Behavioral Health Director for Santa Cruz County. She also served as Health Director for Santa Cruz County and chaired the Financial Services and Medicare committees of CBHDA.

**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.

**JENKINS KUMEH, CPA** Mr. Kumeh started his state service as a financial and compliance auditor at the California State Auditor General's Office now Bureau of State Auditor where he spent four and half years performing financial and compliance audits of state and local government agencies. He subsequently joined the California Department of Insurance as an internal auditor where he was responsible for performance and internal control audits for several years. Mr. Kumeh has been the Chief of

the Mental Health Plans Cost Reporting in the Mental Health Services Division of the Department of Health Care Services since February 2013. He supervises the review and settlement of the Specialty Mental Health cost reports filed by the 58 counties of California for compliance with state and federal laws, regulations and policies. His responsibilities also include providing annual cost report training to the cost reporting and other financial staff of the counties at various sites throughout California. He also taught accounting, auditing and business management at various community colleges for several years as an adjunct faculty. His educational background includes M.S in Business Finance and MBA in Business Administration from California State University at Long Beach. He is a Certified Public Accountant (CPA).

**SHIRLEY K. MARTIN** has served Mono County Behavioral Health, the Mental Health Plan and SUD Outpatient Clinic for Mono County, since 1996. Her duties include financial management, budgeting, program management and reporting. Shirley is now serving as the president for the California Behavioral Health Administrator's Association. She is a Team Leader for Mono County's electronic health record, and business process improvement. She assists the director in policy and organization culture changes to achieve Mono County's vision of Whole Person Wellness.

**SHARON MENDONCA** is the Assistant Director in charge of Administration for Merced County. Sharon has 23 years of experience in the Behavioral Health field. This includes 11 years in Mariposa, 2 years in Tuolumne and 10 years in Merced. Sharon has seen many programs change and grow as funding and grants have changed over time. This is one of the reasons she feels this Fiscal Leadership Institute is so valuable. We can learn a lot from each other. This is a great venue for seeing what others are doing and where this field is headed.

**NOEL O'NEILL, LMFT** Agency Director, Trinity County Behavioral Health Services since 2008. Prior to Trinity he worked in various management and direct provider positions for Mendocino County for 23 years. Co-Chaired the Small Counties Committee for CBHDA and served on the Executive Team for six years. Currently serving a second term as a member of the California Mental Health Planning Council. He has been a nine-year commissioner on both the Trinity County First Five and the Mendocino County Juvenile Justice Commissions.

**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 Bachelors 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.

**ABIMBOLA TAIWO** has over 27 years of experience in accounting, in both the private and public sector. He began his civil service career with Department of Health Care Services (DHCS) - Financial Audits Branch in 1989 as a Health Program Auditor 1 in the Santa Ana Southern California field office. He subsequently joined Caltrans as an Accounting Officer from 1992 to 1995. He later joined ADP in January 1996 as a Management Auditor.

Time and destiny has brought him full circle; Abimbola re-joined DCHS Audits and Investigation following Governor Brown's Executive order of 2013 that directed the merging and transitioning of ADP into DHCS. He currently works as a Health Program Auditor IV in the Financial Audit Branch - ADP Section. His present tenure includes providing assistance to the Section Chief in all facets of Substance Use Disorder (SUD) cost report audits, quality assurance, training and liaison to the Providers and Counties. Abimbola graduated from Brooklyn College -The City University of New York in 1988 with a Bachelor of Science degree in Accounting.

**DONNA THOMPSON** currently works with Privacy Consulting Group as a Senior Consultant providing HIPAA Privacy and Security and MEDS PSA Compliance Assessments and provides consulting on effective business processes including program development and training. Donna has more than 28 years of experience in county government with Welfare/Social Services and Behavioral Health that includes budget development, funding use compliance and overseeing business office processes. Donna has served on several county and state committees interpreting and developing processes to comply with the implementation of new laws and regulations. Donna holds a degree in Business Administration and Entrepreneurship and has served several terms as the President of the California Behavioral Health Administrators Association.

**JEFF VOGEL** has over 24 years of experience in Health Program Auditing. He began his civil service career with the Department of Health Care Services (DHCS, formerly the Department of Health Services), Audits and Investigations Division, Financial Audits Branch (FAB) conducting and supervising audits of acute care hospital, skilling nursing facility, and Federally Qualified Health Center cost reports; Public Health Contracts (Office of AIDS, Children's Medical Services, etc.); and a variety of

special projects. After over 10 years with FAB, he transferred to the Audits and Investigations Division, Medical Review Branch where he supervised a multi-disciplinary team, including healthcare professionals, in the audits of non-institutional Fee-For-Services providers and Medi-Cal Managed Care Plans. He recently transferred back to FAB, this time serving as Section Chief of the Specialty Mental Health Audits Section that, under Governor Brown's Executive order of 2012 directed the merging and transitioning of the Department of Mental Health into DHCS.

Jeff graduated from San Jose State University in 1992 with a Bachelor of Science Degree in Business Administration with a concentration in Accounting.

**PAULA WILHELM**, Senior Policy Analyst, CBHDA Paula joined CBHDA as a Senior Policy Analyst in the spring of 2017, and is responsible for SUD-focused legislative and policy projects alongside housing and workforce issues. Recent highlights include activities related to the Drug Medi-Cal Organized Delivery System, SUD prevention, 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.

# CIBHS COUNTY BEHAVIORAL HEALTH FISCAL LEADERSHIP INSTITUTE PLANNING COMMITTEE

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

**Desiree Alarcon**  
Project Coordinator  
California Institute for  
Behavioral Health Solutions

**Beth Conley, MPA**  
President and CEO  
To The Point Facilitation

**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  
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**Don Kingdon, PhD**  
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**Victor Kogler**  
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