



**ONSITE
PROGRAM**

County Behavioral Health Fiscal Leadership Institute

June 5-6, 2017

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

June 5, 2017

Dear Fiscal Leadership Institute Attendees,

Welcome to the eleventh 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. The movement to repeal the Affordable Care Act, and California's response to these changes, are active areas of policymaking. 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 is pleased to be able to provide mobile access to all of the Institute presentations and materials through this link: <http://my.yapp.us/PPJDP3>

Again, welcome!



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



Kristy Kelly, MA, MFT
CIBHS Consultant

MONDAY, JUNE 5, 2017

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 & 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

A STORY OF RECOVERY

Kristina Padilla MA, IMF, LAADC, ICAADC, CGS

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. Ms. Padilla will share her personal journey to recovery and highlight her experiences with mental health and substance use treatment services provided through the public mental health system. Her 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

Participants will prepare for the 1:15 pm Cost Report session.

12:15 PM

LUNCH (included with registration)

MONDAY, JUNE 5, 2017, continued

1:15 PM

COST REPORTS: WHY DO WE HAVE TO DO THEM AND WHY SHOULD WE CARE?

Mike Geiss, Geiss Consulting

Sue Heavens, Chief, Cost Reports Unit, Fiscal Management and Accountability Branch, Substance Use Disorder-Program, Policy & Fiscal Division, DHCS

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

Jenkins Kumeh CPA, Chief, Mental Health Plans Cost Reporting, DHCS

Lanis Clark, Chief, Alcohol and Drug Section, Financial Audits Branch, DHCS

Preparing and submitting cost reports to the State is one of many important functions of County Behavioral Health fiscal units. Presenters will cover the purpose of cost reporting, opportunities for training and other assistance from the State in determining what data is needed for cost reports, and other practical topics to help fiscal managers and staff in doing cost reports to the State.

2:15 PM

PUBLIC BEHAVIORAL HEALTH FINANCING

Kirsten Barlow, MSW, Executive Director, CBHDA

Mike Geiss, Geiss Consulting

Overview of Behavioral Health Revenue estimates based on the Governor's May Revision of the FY 17-18 California Budget and the implications for County Behavioral Health agencies.

3:00 PM

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

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

Kara Anguiano, Fiscal Manager, Stanislaus County Behavioral Health & Recovery System

Allison McClaughry, Nevada County Health & Human Services Agency

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).

3:30 PM

BREAK

MONDAY, JUNE 5, 2017, continued

3:45 PM

SO...YOU'RE NEW TO BEHAVIORAL HEALTH FINANCE?

Shirley Martin, Fiscal & Administrative Services Officer, Mono County Behavioral Health
Donna Thompson, Medical Fiscal Manager, Sutter-Yuba Behavioral Health

This overview of Behavioral Health funding is presented by the California Behavioral Health Administrator's Association and will cover:

- Behavioral Health Funding History
- Realignment 1991 and 2011
- Mental Health Services Act
- Grants (MHBG & PATH)
- Delivering Service Through Multiple Funding Sources
- Key periods throughout the fiscal year where our different audiences become the focal points (DHCS, County Board of Supervisors, County Finance or Auditor, State Budget Review and Local Approval Processes)
- How can fiscal managers support the knowledge needs and fiscal management needs of new Directors?

4:30 PM

REVIEW INSTITUTE DAY 1 HIGHLIGHTS

Kristy Kelly, MA, MFT, Consultant, CIBHS
Beth Conley, MPA, The Kiely Group

4:45 PM

ADJOURN DAY 1



CIBHS has invited you to use the CIBHS Yapp App at this event.

Your invitation is in this URL: <http://my.yapp.us/PPJDP3>. 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: **PPJDP3**.

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/PPJDP3>, and the app will open in read only mode.

TUESDAY, JUNE 6, 2017

8:30 AM

LIGHT CONTINENTAL BREAKFAST

9:00 AM

WELCOME

Kristy Kelly, MA, MFT, Consultant, CIBHS

9:05 AM

DRUG MEDI-CAL ODS, RATE SETTING. COUNTY REPORTS ON HOW THEIR PROGRAMS ARE GOING

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

Victor Kogler, Vice President, CIBHS

D.J. Pierce, Alcohol and Drug Administrator, Marin County

Clara Boyden, Health Services Manager Alcohol and Other Drug Services, San Mateo County Behavior Health & Recovery Services

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

Meredith Wurden, Associate Director of Financial Policy, Partnership Health Plan of California

Marlies Perez, Division Chief, Substance Use Disorder Services, Compliance Division, DHCS

The Drug Medi-Cal Organized Delivery System (DMC-ODS) is a pilot program in California testing a new paradigm for the organized delivery of health care services for Medi-Cal eligible individuals with substance use disorder. Panelists representing several different counties will discuss how their programs are being implemented, and outline challenges and successes to date.

10:45 AM

BREAK

11:00 AM

HOT ISSUES IN BEHAVIORAL HEALTH POLICY

Kirsten Barlow, MSW, Executive Director, CBHDA

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

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

Representatives from the County Behavioral Health Directors Association of California (CBHDA) will address relevant and topical issues related to local, state or federal public behavioral health finance, policy and programs.

11:45 PM

SMALL GROUP EXERCISE 2

Beth Conley, MPA, The Kiely Group

The goals of this exercise are to help participants:

- Understand the value of perspective
- Learn the importance of asking why
- Connect with others to influence policy

TUESDAY, JUNE 6, 2017, continued

- 12:00 PM **LUNCH** (included with registration)
- 1:00 PM **THE FUTURE OF VALUE BASED PURCHASING IN MEDICARE AND MEDICAID: A data and policy perspective on the shift from volume to value.**
Don Kingdon, PhD, Principal, Behavioral Health Integration, Harbage Consulting
Thad Dickson, President and CEO, Xpio Health

This session will cover data and policy perspectives on Value Based Purchasing, including identification of current opportunities to introduce value into the County purchasing equation, understanding value based metrics and implementation of effective analytics to support value based purchasing at the county level.
- 2:00 PM **BREAK**
- 2:15 PM **Q&A ON PUBLIC BEHAVIORAL HEALTH FINANCING**
Kirsten Barlow, MSW, Executive Director, CBHDA
Mike Geiss, Geiss Consulting

Panelists will address questions from the audience related to information that has been shared over the past two days.
- 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**

Presentations and Handouts can be found at:

cibhs.org/conference/county-behavioral-health-fiscal-leadership-institute-0

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.

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 County 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.

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 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 Ph.D. in Clinical Psychology and is a Licensed Marriage and Family Therapist.

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 implementation and 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. In 2015, Ms. Boyden 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. This model program has been expanded and replicated as part of San Mateo County's Whole Person Care services.

Ms. Boyden works to enhance quality and outcomes in the alcohol and drug treatment system through implementation of system-wide improvement and capacity building strategies. Areas of focus include behavioral health and health care integration, quality and process improvement, aligning practice to evidence, and creating a coordinated and culturally appropriate, trauma informed system of care. Previously, Ms. Boyden 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. Ms. Boyden has a Bachelors Degree from UC Berkeley.

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 County 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 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 Forces and Committees that have 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 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. Ms. Conley 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. Ms. Conley 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 is 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.

Previously, Mr. Copley 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 standardized assessment of trauma and the development of trauma focused therapy.

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. Mr. Daglia'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. Mr. Daglia has 18 years of experience in the financial industry and holds a bachelor's degree in Finance from California State University, Sacramento.

THAD DICKSON 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.

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 26 county mental health agencies in California, and various projects for the County Behavioral Health Directors Association and the California Institute for Behavioral Health Solutions.

SUE HEAVENS is currently the supervisor of the substance use disorders (SUD) cost report unit at the Department of Health Care Services. Ms. Heavens has served the Department since 1987 in a variety of capacities related to SUD services, including programs for women and their children, youth treatment, methadone treatment licensing, and as the project director for California's successful Access to Recovery grant funded by the federal Substance Abuse and Mental Health Services Administration. In her current role, Ms. Heavens oversees the process and review of settling annual county SUD cost reports.

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.

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 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 implementation of information technology and business process improvement; and assists the director in policy and organizational culture changes to achieve Mono County's vision of Whole Person Wellness.

ALLISON MCCLAUGHRY, Administrative Services Officer for Nevada County Health and Human Services Agency has 10 years of governmental expertise primarily supporting Behavioral Health. She has held multiple fiscal related positions and oversees the finances for both Mental Health and Substance Use Disorders programs in her County. Allison is a member of the Financial Analysis and Review Subcommittee (FARS) for the County Behavioral Health Directors Association (CBHDA) Financial Services Committee. She earned her Bachelor of Science Degree in Accountancy from California State University Sacramento.

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 MHSA 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.

KRISTINA PADILLA is a leader with the California Consortium of Addiction Programs and Professionals (CCAPP), where she serves as the Director of Education overseeing CCAPP's Education Department. She also is Director of Business Development for the organization wherein she travels throughout California and the nation bringing addiction focused businesses together to promote the profession, increase access to services and improve the quality of AOD service

provision through education, business development, and investment in quality programming. Formerly she served as the Education Director for the California Association of Alcoholism and Drug Abuse Counselors (CAADAC). Ms. Padilla led California's innovative criminal justice program serving as the Offender Mentor Certification Program Director for three years where she managed 12 in-prison programs for training counselors. She worked closely with the California Department of Corrections and Rehabilitation (CDCR) in California prisons for the duration of the contract bringing innovation and growth to the state's in custody treatment programming. Ms. Padilla has a Bachelor's of Science in Criminal Justice Administration and a Master's Degree in Counseling Psychology. Ms. Padilla is a Marriage and Family Therapist Intern, a Licensed Advanced Alcohol and Drug Abuse Counselor (LAADC), and an International Certified Advanced Alcohol and Drug Abuse Counselor (ICAADC). She is also a Certified Gang Specialist of the National Gang Crime Research Center (NGCRC) and is on the Board of Directors of the National Association of Lesbian, Gay, Bisexual, Transgender Addiction Professionals and their Allies (NALGAP). Ms. Padilla is on the Board of Directors for the National Alliance on Mental Illness (NAMI), Sacramento Board. She is also on the Board of Directors for the Women's Association of Addiction Treatment (WAAT) Board where she is Co-Chair. Ms. Padilla is the Program Director for the Peer Support Specialist Training Program, also known as the PPTP, and is the Chief Academic Officer for the CAARR Institute at CCAPP. Ms. Padilla is also an addiction technology transfer center (ATTC) Trainer regarding LGBTQ addiction topics.

MARLIES L. PEREZ is the Division Chief over the Substance Use Disorder (SUD) Compliance Division within the Department of Health Care Services. Ms. Perez oversees the SUD licensing and certification functions, monitoring, and complaints for Driving Under the Influence Programs, Narcotic Treatment Programs, and outpatient and residential providers. The Division is also responsible for implementing the Drug Medi-Cal Organized Delivery System 1115 waiver, SAMHSA Opioid STR grant and oversight of counselor certification. Ms. Perez has worked in the SUD treatment field for over sixteen years; since the inception of Proposition 36. Her other experience includes the California Conservation Corps, president of a non-profit service organization, VISTA Volunteer, and authoring fiction novels. Ms. Perez has a Bachelor's degree in International Relations and a Master's degree in Organizational Management.

D.J. PIERCE OTR, MPA is the current County Alcohol and Drug Program Administrator for Marin County and recently elected President of CADPAAC. She has worked for Marin's Division of Alcohol and Drug programs since 1990 where she held a variety of positions including developing and managing many of the County's contracted specialized programs such as perinatal, SACPA and Marin's social model/medically supported residential detoxification program. She brings to her position a personal and professional knowledge of substance abuse, its impact on individuals, families and the surrounding community. DJ is passionate in her belief that substance abuse is one of the most critical and misunderstood diseases facing the health field, that it is preventable and treatable and that we must continue to advocate for a full continuum of services that offer individuals and families ready and affordable access to care.

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.

DONNA THOMPSON has more than 28 years of experience with county government. She began her career with Welfare/Social Services, eventually transitioning to the Staff Services Analyst position in Sutter-Yuba County. During her time with Welfare/Social Services Donna served on several county and state committees interpreting and developing processes to comply with the implementation of new laws and regulations. Donna transitioned over to Behavioral Health in 2003 as the Budget Analyst where she was responsible for budget development, contracts and various other fiscal duties. Currently Donna serves as the Medical Fiscal Manager with Sutter-Yuba Behavioral Health, overseeing Business Office Services. In addition to her county assignment, Donna served several terms as the President of the California Behavioral Health Administrators Association and currently is acting as Past President in the transition of leadership to that group.

MEREDITH WURDEN is responsible for fiscal policy development and communication at Partnership HealthPlan of California (PHC). Prior to joining PHC in December of 2016, Wurden worked for the state of California for nearly ten years. From 2013 to 2015, Wurden served as Assistant Deputy Director of Health Care Financing at the California Department of Health Care Services. Wurden also served over seven years with the California State Legislature covering health issues, including as a principal fiscal and policy analyst for the non-partisan California Legislative Analyst's Office and as Deputy Director at the California Senate Office of Research. Wurden also worked at the federal Government Accountability Office. Ms. Wurden has a bachelor's degree in urban studies and planning from the University of California, San Diego and dual master's degrees in public health and public policy from the University of Michigan, Ann Arbor.

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

Kristin Neal
Policy and Financial Analyst
Solano County Health
and Social Services

Desiree Alarcon
Project Coordinator
California Institute for Behavioral
Health Solutions



2125 19th Street
Sacramento, CA 95818

Phone: 916.556.3480
Fax: 916.556.3478

CIBHS.ORG