



**ONSITE
PROGRAM**

County Behavioral Health Fiscal Leadership Institute

November 28-29, 2018

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

November 28, 2018

Dear Fiscal Leadership Institute Attendees,

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

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

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

Again, welcome!



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



Kristy Kelly, MA, MFT
CIBHS Consultant

WEDNESDAY, NOVEMBER 28, 2018

- 8:00 AM **REGISTRATION**..... Salon C/D
- 9:00 AM **WELCOME AND INTRODUCTIONS** Salon C/D
Kristy Kelly, MA, MFT, Consultant, California Institute for Behavioral Health Solutions (CIBHS)
- 9:30 AM **OPENING REMARKS** Salon C/D
Percy Howard III, LCSW, President and Chief Executive Officer, California Institute for Behavioral Health Solutions (CIBHS)
Tom Renfree, Acting Executive Director, County Behavioral Health Directors Association of California (CBHDA)
- 9:45 AM **POLICY UPDATES FROM THE DEPARTMENT OF HEALTH CARE SERVICES**..... Salon C/D
Brenda Grealish, Acting Deputy Director, Mental Health & Substance Use Disorder Services, DHCS
Don Braeger, Division Chief, Substance Use Disorder Program, Policy and Fiscal Division, DHCS
Dina Kokkos-Gonzales, Chief, 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. Topics will include: Medi-Cal Waiver 2020, Fiscal Regulation package, update on State Audit, DHCS Care Coordination, and DMC-ODS implementation.
- 11:00 AM **BREAK/TRANSITION TO BREAKOUT SESSIONS**
- 11:15 AM **CONCURRENT BREAKOUT SESSIONS:**
- A. PUBLIC MENTAL HEALTH FINANCING** Sacramento Room
Mike Geiss, Geiss Consulting
- County behavioral health fiscal leaders need as much information as possible to effectively manage resources and budgets in the face of significant changes in health care delivery and behavioral health financing. The presenter will describe the major behavioral health funding streams focusing on the mental health side, provide updates on important developments, and discuss implications for counties from a fiscal perspective.
- B. SUD/DMC FISCAL ISSUES & UPDATES** Salon C/D
Victor Kogler, Vice President, CIBHS
Paula Wilhelm, Policy Analyst, CBHDA
- California’s implementation of the federal Section 1115 Waiver for Drug Medi-Cal (the DMC-ODS) provides new federal and state funding for SUD treatment, and supports an organized delivery system that ensures access to a full continuum of SUD care. This session will include policy updates, opportunities, and challenges for county SUD programs. It will also emphasize Q&A, shared learning, and county-to-county dialogue.

WEDNESDAY, NOVEMBER 28, 2018, CONTINUED

- 12:30 PM **LUNCH** (included with registration)
- 1:30 PM **CONCURRENT BREAKOUT SESSIONS: MH/SUD COST REPORTING** Salon C/D
- Cost monitoring and reporting is an essential component of the work of county behavioral health fiscal managers. This session will be geared for fiscal managers of mental health or SUD services to assist them in maintaining better financial control of the program costs within their agencies. DHCS will respond to specific questions asked by participants and will share some best practices and recommendations for timely and accurate cost reporting.
- A. MENTAL HEALTH** Sacramento Room
Moses Ndungu, Chief, Fiscal Policy Section, Mental Health Management and Performance Outcomes Branch, Mental Health Services Division, DHCS
- B. SUD** Salon C/D
Jarrett Davis, Cost Reports Unit Supervisor, SUD - Program, Policy and Fiscal Division, DHCS
- 2:45 PM **BREAK/TRANSITION TO GENERAL SESSION**
- 3:00 PM **A STORY OF RECOVERY** Salon C/D
- Kelechi Ubozoh**, Tech Suite State Peer & Community Engagement Manager, CalMHSA
- 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. Through poetry and inspirational stories, Kelechi Ubozoh, a mental health advocate and researcher, will share her personal journey to recovery and highlight her experiences with mental health 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.
- 3:45 PM **HOUSING AND HOMELESS FUNDING RESOURCES: FISCAL IMPLICATIONS** Salon C/D
- Tyler Rinde**, Legislative Analyst, CBHDA
Paula Wilhelm, Senior Policy Analyst, CBHDA
- The State of California has made available an unprecedented amount of funding for homeless services and supportive housing, much of which flows through counties. Presenters from a variety of administering agencies will discuss the fiscal aspects of these funding programs and explain some of the financial implications for counties.
- 4:45 PM **REVIEW INSTITUTE DAY 1** Salon C/D
- Kristy Kelly, MA, MFT**, Consultant, CIBHS
Beth Conley, MPA, To The Point Facilitation, Inc.
- 5:00 PM **ADJOURN**

THURSDAY, NOVEMBER 29, 2018

- 8:30 AM **REGISTRATION**..... Salon C/D
- 9:00 AM **WELCOME AND REVIEW OF DAY 1** Salon C/D
Kristy Kelly, MA, MFT, Consultant, CIBHS
- 9:15 AM **THE 2018 CALIFORNIA LEGISLATIVE YEAR**..... Salon C/D
Tom Renfree, Acting Executive Director, CBHDA
Tyler Rinde, Legislative Analyst, CBHDA
 We will review major legislation of interest to counties enacted in 2018, the federal landscape with respect to health issues and anticipated state and federal issues for 2019.
- 10:15 AM **BREAK/TRANSITION TO BREAKOUT SESSIONS**
- 10:30 AM **CONCURRENT BREAKOUT SESSIONS: MH/SUD AUDITS** Salon C/D
 Preparing for an audit is an important function of fiscal managers within county behavioral health agencies. These breakout sessions will be geared for fiscal managers of mental health or SUD services. Presenters will address specific questions posed to them ahead of time and will give suggestions for how best to prepare for an audit.
- A. MENTAL HEALTH** Sacramento Room
Jeff Vogel, Section Chief, Specialty Mental Health Audits Section, Department of Health Care Services (DHCS)
Glenn Mueller, Health Program Audit Manager I, Specialty Mental Health Audits Section, Department of Health Care Services (DHCS)
- B. SUD** Salon C/D
Naheed Khan, Health Program Auditor 3, Audits and Investigative Division, DHCS
Andrew Dill, Health Program Auditor 2, Audits and Investigative Division, DHCS
- 11:45 AM **LUNCH** (included with registration)
- 12:45 PM **MENTORING SESSION**..... Salon C/D
 This mentoring session provides opportunities for county staff to learn from each other. Experienced staff will answer questions and provide guidance and support to newer staff. Counties can hear about, and share their own, best practices, successes and challenges.
- 1:45 PM **BREAK**

THURSDAY, NOVEMBER 29, 2018, CONTINUED

- 2:00 PM **ANNUAL MENTAL HEALTH SERVICES ACT (MHSA)
REVENUE AND EXPENDITURE REPORTS (ARERS)** Salon C/D
Donna Ures, Chief, MHSA Oversight and Fiscal Reporting Section, Department of Health Care Services (DHCS)
- During this session, counties will be provided with updates regarding the MHSA Annual Revenue and Expenditure Report. There will also be an opportunity for counties to discuss concerns and challenges associated with submitting the ARER in a timely and accurate manner.
- 3:15 PM **Q&A ON PUBLIC BEHAVIORAL HEALTH FINANCING** Salon C/D
Tom Renfree, Acting Executive Director, CBHDA
Mike Geiss, Mike Geiss Consulting
- Panelists will address questions from the audience related to information that has been shared over the past two days.
- 4:30 PM **ADJOURN**

Speakers' Biographies for 2018 Fiscal Leadership Institute

DON BRAEGER is the Chief of the Substance Use Disorder (SUD) Program, Policy, and Fiscal Division with the California Department of Health Care Services and has over 15 years of experience working in healthcare programs and policy. In 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 program, policy and fiscal initiatives.

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.

JARRETT DAVIS is the Cost Report Unit Supervisor in the Substance Use Disorder Program, Policy and Fiscal Division at the Department of Health Care Services. He has been with the department and the division since 2013. During his time at DHCS he has worked as a cost report analyst, Drug Medi-Cal monitor, and DMC-ODS analyst before assuming the role of supervisor in June of 2018. He received his B.S. in Business Administration from CSU-Sacramento and is currently pursuing a graduate degree in Public Health at the University of San Francisco.

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

BRENDA GREALISH is currently the Acting Deputy Director for Mental Health and Substance Use Disorder Services (MHSUDS). She was appointed Assistant Deputy Director for MHSUDS within the California Department of Health Care Services (DHCS) in November 2014. As Acting Deputy Director, Ms. Grealish is responsible for all of the DHCS

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 ten years in increasingly responsible positions. She worked at the Department of Corrections and Rehabilitation for four years during which she advanced to Deputy Director. Prior to her appointment as Assistant Deputy Director, Ms. Grealish was the Chief of the DHCS Mental Health Services Division. Ms. Grealish has a Bachelor's and Master's Degree in Psychology.

PERCY HOWARD III, LCSW, is the President and 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 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.

NAHEED KHAN has over six years of experience in Accounting and Auditing in the private and public sector. Naheed started his career with Department of Health Care Services Drug Medi-Cal Audit Section over four years ago. Over the years, he has trained and developed new staff in performing fiscal and compliance audits. He is currently working closely with management to develop new core training material for Drug Medical section. Naheed graduated from Sacramento State University in 2012 with a Bachelor of Science Degree in Accounting.

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.

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.

GLENN MUELLER is a Health Program Audit Manager with the Audits and Investigations Division of the Department of Health Care Service. He started his career with the State in 1993, joining what is now the Department of Health Care Services. From 1993 through 2007, Glenn performed audits of hospitals, skilled nursing facilities, Public Health Contracts, Medi-Cal Managed Care Plans, and Federal Qualified Health Center cost reports. In 2007, Glenn transferred to the Department of Mental Health, where he has conducted audits of the Short Doyle/ Medi-Cal (SD/MC) cost report and the MSHA RER report for the last 11 years. Glenn graduated from San Jose State University with a Bachelor of Science Degree in Business Administration with an Accounting Emphasis.

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

THOMAS RENFREE is the Acting Executive Director for the County Behavioral Health Directors Association of California (CBHDA). 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.

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

KELECHI UBOZOH is a Nigerian-American mental health advocate, writer, and SF Bay Area poet. In summer of 2019, her book with co-editor Liz Green, *We've Been Too Patient* will be released from North Atlantic Books and distributed by Penguin Random House. *We've Been Too Patient* is a collection of a diverse of voices who all share their stories of radical healing and consider the recent movement towards reform in the mental health field. Kelechi is featured in The Voice Award Winning documentary, *The S Word*, following the lives of suicide attempt survivors to eliminate stigma of mental health issues. Currently Kelechi works at CalMHSA as the Statewide Technology Project Peer and Community Engagement Manager.

DONNA URES is the Chief of the MHSA Oversight and Fiscal Reporting Section at the Department of Health Care Services.

JEFF VOGEL is the Chief of the Specialty Mental Health Audits Section in the Audits & Investigations Division's Financial Audits Branch at DHCS. He has over 25 years of health program audit experience including acute hospital, skilling nursing facility, and Federally Qualified Health Center cost reports; Public Health Contracts (Office of AIDS, Children's Medical Services, etc.); non-institutional Fee-For- Services providers and Medi-Cal Managed Care Plans; and most recently Specialty Mental Health programs. Jeff graduated from San Jose State University in with a Bachelor of Science Degree in Business Administration – Accounting Emphasis.

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

CIBHS COUNTY BEHAVIORAL HEALTH FISCAL LEADERSHIP INSTITUTE PLANNING COMMITTEE

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