



**ONSITE
PROGRAM**

County Behavioral Health Fiscal Leadership Institute

December 16–17, 2015

Doubletree by Hilton Sacramento
2001 Point West Way
Sacramento, California 95818

PROGRAM AT-A-GLANCE

WEDNESDAY, DECEMBER 16, 2015

8:15 am	Registration
9:00 am	Welcome and Introductions
9:20 am	Opening Remarks
9:30 am	Public Behavioral Health Policy
10:45 am	Break
11:00 am	Drug Medi-Cal Panel: Update on Rollout and Fiscal Implications
12:15 pm	Small Group Exercise
12:30 pm	Lunch (included with registration)
1:30 pm	Why Do We Do This?
2:30 pm	Break
2:45 pm	Behavioral Health Fiscal Update
4:00 pm	Questions & Answers
4:20 pm	Review of Day 1 and Wrap Up
4:30 pm	Adjourn

THURSDAY, DECEMBER 17, 2015

9:00 am	Program Opening
9:15 am	Certified Community Behavioral Health Clinics, National Perspective
10:30 am	Break
10:45 am	County Presentation: Drug Medi-Cal Organized Delivery System
11:45 am	Guided Exercise
12:15 pm	Lunch (included with registration)
1:15 pm	Data Warehouse Strategies, Performance Based Analytics and Fiscal IT
3:00 pm	Review of Institute
3:30 pm	Adjourn

December 16, 2015

Dear Fiscal Leadership Institute Attendees,

Welcome to the ninth California Institute for Behavioral Health Solutions (CIBHS) Fiscal Leadership Institute! We look forward to spending the next two days with you.

We will be focusing on major policy developments related to the California Behavioral Health budget and funding systems, from county and state perspectives, as well as on several national initiatives that impact behavioral health in California. We will explore the impact of these policies on the community behavioral health system and will forecast and explain future behavioral health revenue projections and their impact on county behavioral health agencies primarily from a financial point of view.

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.

The Fiscal Leadership Institute program over the next two days will explore both the current policy and financial landscape as well as take a longer-term view toward building the competencies and skills that will strengthen behavioral health financing in the future.

Again, welcome!



Sandra Naylor Goodwin, Ph.D, MSW
CEO and President, CIBHS

Donna M. Wigand

Donna M. Wigand, LCSW
CIBHS Consultant

WEDNESDAY, DECEMBER 16, 2015

8:15 AM

REGISTRATION

9:00 AM

WELCOME AND INTRODUCTIONS

Donna Wigand, LCSW, California Institute for Behavioral Health Solutions (CIBHS) Consultant

9:20 AM

OPENING REMARKS

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

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

9:30 AM

PUBLIC BEHAVIORAL HEALTH POLICY

- Counties: **Kirsten Barlow, MSW**, Executive Director, CBHDA, and **Tom Renfree**, Deputy Director of Substance Use Disorder Services, CBHDA
- State: **Karen Baylor, PhD, LMFT**, Deputy Director of Mental Health and Substance Use Disorders, Department of Health Care Services (DHCS), and **Brenda Grealish**, Assistant Deputy Director Mental Health and Substance Use, Disorder Services
- Fiscal: **Don Kingdon, PhD**, Harbage Consulting

The presenters will describe the major policy developments related to the CA Behavioral Health Budget and funding systems from county, state and fiscal perspectives including a discussion about the State's Certified Community Behavioral Health Centers Demonstration project. They will describe the impact of these policies on the community behavioral health system and will forecast and explain future behavioral health revenue projections and their impact on county behavioral health agencies primarily from a financial point of view.

10:45 AM

BREAK

11:00 AM

DRUG MEDI-CAL PANEL: UPDATE ON ROLLOUT AND FISCAL IMPLICATIONS

Marlies Perez, Division Chief over the Substance Use Disorder Compliance Division, DHCS

Don Kingdon, PhD, Harbage Consulting

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

Victor Kogler, Vice President, CIBHS

The presentation will address key operational issues in the Drug Medi-Cal System Waiver including updates on roll out and fiscal implications for counties. Topics discussed will be financing, delivery system design, regional provider networks and the experience of Phase I counties in waiver planning and early implementation.

12:15 PM

SMALL GROUP EXERCISE

Beth Conley, MPA, The Kiely Group

12:30 PM

LUNCH (included with registration)

WEDNESDAY, DECEMBER 16, 2015 (Continued)

1:30 PM

WHY DO WE DO THIS?

Stephen Boyd, Contra Costa County

In many cases, fiscal managers in counties do not interact with the individuals who are on the receiving end of all of their hard work – those who are receiving public mental health services. Mr. Boyd's presentation will provide some insight into his lived experience in the public behavioral health system and serve as a reminder to those in the fiscal/indirect service pathway about how fiscal and program create opportunities for consumers and family members to thrive.

2:30 PM

BREAK

2:45 PM

BEHAVIORAL HEALTH FISCAL UPDATE

Mike Geiss, Geiss Consulting and **Kirsten Barlow, MSW**, Executive Director, CBHDA

The presenters will provide an in-depth update on all sources of BH funding: structural changes in funding programs, the MHSa program and the implications for counties—especially from a fiscal perspective.

4:00 PM

QUESTIONS & ANSWERS

Kirsten Barlow, MSW, Executive Director CBHDA; **Mike Geiss**, Geiss Consulting

4:20 PM

REVIEW OF DAY 1 AND WRAP UP

Donna Wigand, LCSW, CIBHS Consultant

4:30 PM

ADJOURN

Presentations & Handouts and can be found at:

<http://www.cibhs.org/event/fiscal-leadership-institute-december-2015>

THURSDAY, DECEMBER 17, 2015

- 9:00 AM **PROGRAM OPENING**
Donna Wigand, LCSW, California Institute for Behavioral Health Solutions (CIBHS) Consultant
- 9:15 AM **CERTIFIED COMMUNITY BEHAVIORAL HEALTH CLINICS, NATIONAL PERSPECTIVE**
Dale Jarvis, CPA, Dale Jarvis and Associates and **Thad Dickson, PMP, CPHIMS**, CEO Xpio Health
In 2016, California will be moving forward with the state's Certified Community Behavioral Health Clinic (CCBHC) design work, involving a number of people in this meeting and eventually affecting every mental health and substance use disorder provider organization in the state. This session has been designed to support your efforts, describing the history of the program, the key program elements, required performance measures, and the new payment model.
- 10:30 AM **BREAK**
- 10:45 AM **COUNTY PRESENTATION: DRUG MEDICAL ORGANIZED DELIVERY SYSTEM**
Bruce Copley, Director Department of Alcohol and Drug Services, Santa Clara County
The DMC-ODS Waiver offers counties the chance to develop an organized/integrated system of care. To realize this "system," a framework that is based on a set of fiscal parameters tied to treatment dosage is necessary. Utilizing this approach will allow counties to adjust the delivery system over the course of this demonstration period to meet the needs of the beneficiaries and achieve a stable fiscal structure.
- 11:45 AM **GUIDED EXERCISE**
Beth Conley, MPA, The Kiely Group
- 12:15 PM **LUNCH** (included with registration)
- 1:15 PM **DATA WAREHOUSE STRATEGIES, PERFORMANCE BASED ANALYTICS AND FISCAL IT**
Thad Dickson, PMP, CPHIMS, CEO, Xpio Health
Shawn Frasier, MSPH, Principal and Founder, Pinnacle Health Informatics
This presentation will offer a look at blending traditional EHR reports with Data Warehouse strategies to maximize financial and clinical data intelligence in order to improve quality of services while reducing costs.
- 3:00 PM **REVIEW OF INSTITUTE**
Donna Wigand, LCSW, California Institute for Behavioral Health Solutions (CIBHS)
- 3:30 PM **ADJOURN**

KIRSTEN BARLOW, MSW, began serving as Executive Director of the County Behavioral Health Directors Association (CBHDA) of California in October 2015. Over the past year, Kirsten has worked as Executive Officer of the Council on Mentally Ill Offenders, a position to which she was appointed by Governor Edmund G. Brown, Jr. The Council on Mentally Ill Offenders develops strategies for keeping youth and adults with mental illness out of the criminal justice system. Between 2009 and 2014, Kirsten was Associate Director at CBHDA, where she directed the Association's legislative and budget advocacy efforts. Prior positions included serving as public information officer at the California Department of Mental Health, legislative advocate and information officer for the Los Angeles County Department of Mental Health, and Principal Consultant to the California State Assembly Committee on Human Services under the leadership of former Assemblywoman Dion Aroner (D-Berkeley). Kirsten 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. Kirsten and her husband Ian live in Sacramento, CA, where they are raising their two sons, Myles and Bennett.

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

STEPHEN BOYD is an employee of Contra Costa Behavioral Health, working within the Office for Consumer Empowerment. He was born and raised in Southern California and moved to Northern California in 2001.

Stephen is a US Army Veteran.

Stephen is the Team Lead at the Office for Consumer Empowerment and is also known because of his work as the instructor of the Service Provider Individualized Recovery Intensive Training Program also known as the SPIRIT Program. Stephen instructed SPIRIT for Three years and Just recently passed it over to two new instructors in order to take on new duties to broaden his work force experience.

Stephen will be telling the story of his life time journey which includes many struggles with mental health issues and the trials that come along with them including the story of his recovery and his ongoing successes in this present day.

BETH CONLEY is the Vice President, Government and Nonprofit Relations for the Kiely Group (KGI). She brings the abilities 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 healthcare 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, Director Department of Alcohol and Drug Services, 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."

Most recently while still the Deputy Director, he initiated a review and redesign of the Family and Children system of care. The goal of this initiative is to establish a broad philosophy of services that are grounded in the understanding of how developmental delays and trauma affect the well-being of children and youth, and development of treatment interventions that address these factors in terms of children and adolescent functioning.

Prior to his tenure with the Mental Health Department, he was the Deputy Director of the Santa Clara County Department of Alcohol and Drug Services for fourteen years. Some of his service implementations included: the first public managed care system of substance abuse in California; development of service for the Substance Abuse Treatment Court; an integrated system of care in collaboration with the Mental Health, Public Health

and the Social Services Agency for Cal-Works participants; and an in-depth trauma study of incarcerated juveniles that resulted in recommendation for standardize assessment of trauma and the development of trauma focused therapy.

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

THAD DICKSON is President and CEO of Xpio Health, a boutique healthcare technology company founded in 2010 around a simple objective: to provide transformational technology services and solutions to behavioral healthcare organizations. Mr. Dickson is a nationally respected speaker on the subject of Meaningful Use and its role in behavioral health, and works with a variety of EHR systems and applications related to HIE, patient portals, service delivery, billing and financial, and data analytics. Mr. Dickson did his undergraduate work in psychology and literature, holds several Microsoft Technology certifications, and is a Project Management Professional, a member of HIMSS and a Certified Health Information Management Specialist, as well as a member of ISACA, NAMI, and the National Council for Behavioral Health.

Under Thad's leadership, Xpio Health has helped behavioral health organizations and hospitals bring in nearly \$20 Million dollars of federal incentives related to Meaningful Use. Xpio Health does business in over 12 States, and has an excellent track record of delivering EHR implementations that work, and analytics solutions that transform data into information. Xpio Health also has a growing portfolio of software solutions and meaningful use products focused on creating exceptional value for mental health organizations and the clients they serve, and a growing team of consultants that bring unique talent, EHR specific expertise, Jedi-like crystal report writing skills, and a broad and deep range of software and technology know-how under one roof.

And as the healthcare landscape shifts around us, Xpio Health continues to explore and develop new and better technologies, disrupt and innovate along with their clients, and strives to contribute to the mission and vision of improving the health and healthcare, well-being, and integrity of our communities.

SHAWN FRASIER, MSPH, is principal and founder of Pinnacle Health Informatics which focuses on data integration, data warehousing, multidimensional analysis and in-depth analytics for healthcare, environmental science and pharmaceutical industries. Shawn works with behavioral healthcare agencies nationwide on initiatives that include financial technology, treatment, meaningful use, and outcomes analytics as well as prescriber productivity and utilization management. Pinnacle specializes in developing data warehousing systems which integrate all relevant data sources, including electronic health

record, financial system, human resource and unstructured data to provide analytic platforms that allow faster insight and support informed decision making.

MICHAEL R. GEISS is the founder of Geiss Consulting, a Sacramento-based management consulting firm. He has over twenty-five 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 over the last twenty-five years, including more than twenty projects for the California Department of Mental Health, numerous projects for more than 25 county mental health agencies in California, and various projects for the California Mental Health Directors' Association and the California Institute for Mental Health.

SANDRA NAYLOR GOODWIN, PHD, MSW, President and CEO, California Institute for Behavioral Health Solutions (CIBHS) is the founding President and CEO of 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 healthcare 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 MHPA 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 Ph.D. degree in clinical psychology from the Professional School of Psychology.

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.

DALE JARVIS is the founder of Dale Jarvis and Associates LLC, a Seattle-based consulting firm. Mr. Jarvis has extensive experience helping health plans and healthcare providers redesign their organizations to achieve better health for the populations they serve, better care for individuals, and reduced costs. He has contributed articles to publications and is a co-author of two books on healthcare system redesign. Mr. Jarvis has been a certified public accountant in the State of Washington and a member of the American Institute of Certified Public Accountants since 1982.

Currently Mr. Jarvis is focusing on healthcare reform to help ensure the needs of persons with mental health and substance use disorders are addressed as reform unfolds. This includes working with states, health plans, regional authorities, and at a national level to develop strategies that align the mental health and substance use safety net systems with general healthcare reform efforts.

DON KINGDON, PHD, is the Mental Health Policy Director for Harbage Consulting. He 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.

MARLIES L. PEREZ is the Division Chief over the Substance Use Disorder Compliance Division within the Department of Health Care Services. Ms. Perez oversees the licensing and certification functions, monitoring, and complaints for Driving Under the Influence Programs, Narcotic Treatment Programs, and outpatient and residential providers. The Division also ensures compliance with the statewide criminal justice treatment programs and counselor certification. Ms. Perez has worked in the substance abuse treatment field for thirteen years, since the inception of Proposition 36. Her other experience includes serving as a VISTA Volunteer, developing at-risk youth, president of a non-profit service organization, authoring fiction novels and service learning. Ms. Perez has a Bachelor's degree in International Relations and a Master's degree in Organizational Management.

TOM RENFREE is the Deputy Director, Substance Use Disorder Services for the County Behavioral Health Directors Association of California. Previously he worked for and represented the County Alcohol and Drug Program Administrators Association of California (CADPAAC) for the twelve years. He began his work in the field as a legislative advocate for CADPAAC, and in 2006 he was asked to serve as Executive Director of the Association. In this role, Mr. Renfree was active in statewide efforts to increase local government funding and support for both adult and adolescent alcohol and other drug prevention and treatment services. Mr. Renfree has a Bachelor's degree in history and political science from the University of California, Davis. 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 M. WIGAND, LCSW, is a consultant to the California Institute for Behavioral Health Solutions (CIBHS). Prior to joining CIBHS as a consultant last year, Ms. Wigand served for 33 years in mental health services. She was employed for more than six years as a licensed clinical social worker in both San Diego private and public sectors prior to accepting the position of Deputy Director of Behavioral Health in Imperial County in 1986. In 1988, she became the Director of Mental Health and Substance Abuse for Fresno County. With a staff of more than 400 employees, she successfully steered the county's mental health department through its implementation of managed care for inpatient mental health services for Medi-Cal recipients. She was also responsible for the department's conversion to the "Rehabilitation Option" and she planned, helped design, and implemented a new Crisis Intervention Unit. In 1996, she accepted the position of Mental Health Director for Contra Costa County. She managed the implementation of outpatient managed care, enabling the county's mental health system to become the Medi-Cal administrator for all mental health services in the county, including the private sector. She also led the implementation of the Mental Health Services Act, which was passed by the voters as Proposition 63 in 2004.

During her tenure in public mental health, Ms. Wigand was elected Secretary-Treasurer of the California Mental Health Directors Association (CMHDA) in 1995 and Vice-President in 1996. She chaired several of the CMHDA committees including its Forensic Task Force, Legislative Committee, and the Financial Services Committee. She was also a member of the CMHDA Governing board.

CIBHS FISCAL LEADERSHIP INSTITUTE ADVISORY COMMITTEE

The CIBHS Fiscal Leadership Institute is put into action with the support of our
Planning Team and Advisory Committee.

We thank the following individuals for their time and contributions as
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