June 2018 County Behavioral Health Fiscal Leadership Institute

Monday, June 4th, 2018

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

**9:15 AM REGISTRATION**

**9:55 AM WELCOME AND INTRODUCTIONS**

**Kristy Kelly, MA, MFT,** Consultant, California Institute for Behavioral Health Solutions (CIBHS)

**10:10 AM OPENING REMARKS**

**Percy Howard III LCSW,** Chief Executive Officer, California Institute for Behavioral Health Solutions (CIBHS)

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

**10:20 AM POLICY UPDATES FROM THE DEPARTMENT OF HEALTH CARE SERVICES**

**Brenda Grealish,** Acting Deputy Director, Mental Health & Substance Use Disorder Services

**Presenter TBD**

This session will address emerging behavioral health policy developments from a state perspective and their potential fiscal implications for county behavioral health agencies.

**11:00 AM PUBLIC BEHAVIORAL HEALTH FINANCING**

**Kirsten Barlow, MSW,** Executive Director, CBHDA

**Mike Geiss,** Geiss Consulting

County behavioral health fiscal leaders need as much information as possible to effectively manage resources and budget in the face of significant changes in health care delivery and behavioral health financing. The Panelists will describe the major behavioral health funding streams, provide updates on important developments, and discuss implications for counties from a fiscal perspective.

**11:45 AM County-to-County Networking**

**Beth Conley, MPA,** To The Point Facilitation, Inc.

**12:00 PM LUNCH** (included with registration)

**1:00 PM *Concurrent Break-out Sessions:* MH/SUD cost reporting**

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/SUD] services. This session will cover how to look at your own costs to maintain better financial control of the program costs within your agency. The session will address questions about what is administrative and what is not, and how to approach allocating, forecasting and analyzing costs toward more effective cost monitoring and reporting within a public behavioral health agency.

1. **Mental Health – Chuck Anders**
2. **SUD – Elsa Murphy**

**2:15 PM BREAK**

**2:25 PM a story of recovery**

**Autumn Rhapson**

**3:10 PM OVERVIEW OF DRUG MEDI-CAL WAIVER: UPDATES**

**Victor Kogler**, Vice President, CIBHS

**Tom Renfree,** Deputy Director, Substance Use Disorders Services, CBHDA

**Paula Wilhelm,** Policy Analyst, CBHDA

California’s implementation of the federal Section 1115 Waiver for Drug Medi-Cal (the DMC-ODS) 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. This session will address fiscal policy updates and ongoing opportunities and challenges for ODS counties, and will emphasize Q&A, shared learning, and county-to-county dialogue***.***

**3:40 PM BREAK**

**3:45 PM The 2017 and 2018 California Legislative Years**

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

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

We will review major legislation of interest to counties enacted in 2017/18, the federal landscape with respect to health issues and anticipated state and federal issues for 2018. The State Auditor’s MHSA Audit will also be discussed.

**4:30 PM REVIEW INSTITUTE DAY 1**

**Kristy Kelly, MA, MFT,** Consultant, CIBHS

**Beth Conley, MPA,** To The Point Facilitation, Inc.

**5:00 PM ADJOURN**

**Tuesday, June 5th, 2018**

**9:00 AM WELCOME**

**Kristy Kelly, MA, MFT,** Consultant, CIBHS

**9:10 AM BEHAVIORAL HEALTH FUNDING HISTORY**

**Shirley Martin,** Fiscal & Administrative Services Officer, Mono County Behavioral Health

**Donna Thompson,** Medical Fiscal Manager, Sutter-Yuba Behavioral Health

**9:40 AM MHSA Reversion: Implications for counties**

**Mike Geiss,** Geiss Consulting

Welfare and Institutions Code specifies that funds must be spent within a certain time

period or returned to the state. DHCS sent notice of unspent funds subject to reversion based on the MHSA Annual Revenue and Expenditures submitted by each county. Counties are now required to develop expenditure plan by July 1, 2018, on how the county intends to spend the funds by June 30, 2020.

**10:40 AM break**

**10:50 am Q&A ON PUBLIC BEHAVIORAL HEALTH FINANCING**

**Kirsten Barlow, MSW,** 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. The session will end with a review of Day 1 and 2

**12:05 PM LUNCH** (included with registration)

**1:00 PM** ***Concurrent Break-out Sessions*: Fiscal issues, challenges and opportunities based on county size**

**A. SMALL COUNTY FISCAL ISSUES**

**Noel O’Neill, LMFT,** Agency Director, Trinity County Behavioral Health Services

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.

**B. MEDIUM/LARGE COUNTY FISCAL ISSUES**

**Sharon Mendonca,** Assistant Director, Merced County

**PRESENTER TBD**

**2:15 PM TRANSITON TO BREAKOUTS**

**2:25 PM *Concurrent Break-Out Sessions:* MH/SUD Audits**

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/SUD] services. The session will cover what are auditors are looking for, what inconsistencies they are they seeing between counties, and how can counties better prepare for a successful audit.

**A. MENTAL HEALTH – Shirley Castaneda & Kelly Zhang**

**B. SUD – Lanis Clark**

**3:40 PM TRANSITIONS TO GENERAL SESSION**

**3:50 PM Annual Mental Health Services Act (MHSA) Revenue and Expenditure Reports (ARERs)**

**Donna Ures,**

**Chuck Anders,**

**4:30 PM ADJOURN**