

## **RICHARD H. DOUGHERTY, Ph.D.**

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### **PROFESSIONAL EXPERIENCE:**

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11/87-Present **President**, DMA Health Strategies, Lexington, MA

Consulting since 1987 to government and private healthcare organizations on strategies to manage health systems change and quality improvement. Achieved national recognition in public sector strategy, managed behavioral health care initiatives, financing, performance measurement, and quality improvement. Selected examples of major projects include:

- Consulting lead on the SAMHSA planning grant for the Massachusetts Certified Community Behavioral Health Clinics
- Behavioral health subject matter expert for Massachusetts Medicaid Payment Reform initiative
- Leadership of research for the preparation of the MA CHIA report on substance abuse.
- Leadership of the MA Blue Cross Blue Shield Foundation's report "Addiction and recovery Services in the City of Boston: A blueprint for building a better system of care".
- Prime consultant for the MA Health Planning Council's 2014 report on behavioral health system capacity.
- Principal Investigator for MA Title IV-E 2014-2019 Waiver (Caring Together) evaluation
- Lead consultant on the development of a 2014 RFP for a statewide network of Family Resource Centers in MA
- Lead consultant on major projects with the Lewin Group for CMS behavioral health analytics for people with Medicare and Medicaid eligibility
- Numerous projects for SAMHSA with Truven Health Analytics (Assessing the Evidence Base) and Westat (Support for the CMHS Office of the Director)
- Conceived and implemented the Children's Mental Health Benchmarking Project, comparing data from over 30 states and counties
- Lead responsibility for SAMHSA program reviews of SAMHSA's Children's Mental Health Initiative and the National Child Traumatic Stress Initiative
- Chair of the December 2012 ACMHA Policy Forum and Congressional Briefing on Harnessing Community Support for Health and Well-Being
- Conducted assessments of Detroit-Wayne County MCPN networks, Washington State's regional mental health carve-out, and New York's ambulatory mental health system
- Leadership of a 2008 legislative assessment of Montana's mental health system, including a comprehensive needs, utilization and gaps analysis
- Implementation planning for a self-directed care initiative in Delaware County PA
- Strategic planning and policy development for the Massachusetts Departments of Mental Health in 2007 and Bureau of Substance Abuse Services from 2004 to present
- Leadership of two major quality improvement collaboratives: the MA Department of Mental Health Readmission Collaborative and the California Learning Collaborative
- Leadership of the 2004 Consumer-Direction Initiative Summit for SAMHSA
- Prepared nationally recognized policy papers for the Commonwealth Fund and the Center for Health Care Strategies
- Designed the system and developed RFPs in San Diego County for an Administrative Services Organization; in Washington, DC for the Children's SSI Plan; in New York for the Children's Special Needs Plans; and in Massachusetts for Commonworks and for the Massachusetts Medicaid behavioral health procurement in 1991-2 and 1995-6

- 10/06-Present **President**, BasicNeeds US, Inc.  
Leading efforts to provide technical assistance, support and development of a US based affiliate of BasicNeeds International with partners in Detroit and other urban and frontier communities.
- 2/85-10/87 **Senior Manager**, Management Advisory Services, BDO/Seidman, Boston, MA  
Built a non-profit and government services consulting practice this national accounting firm. Work included a court appointed receivership of one of the state's largest community mental health centers, the implementation of manual and automated financial accounting systems, strategic planning, management and organizational analysis.
- 5/82-2/85 **Manager of Finance**, Mentor, Inc. and National Mentor, Inc., Boston, MA  
Responsible for all financial management of this growing specialized health care organization as it developed a for-profit division and expanded into several other states. Member of the Board of Directors during a transition until venture financing was obtained.
- 6/80-4/82 **Program Manager**, Department of Social Services, Boston, MA  
Responsible for all group care rate setting and purchasing policy
- 4/79-6/80 **Evaluation Specialist/Rate Setting Liaisons**, Dept. of Public Welfare, Purchase of Service Unit and Group Care Unit, Boston, MA
- 8/77-4/79 **Treatment Coordinator**, Communities for People, ALS Program, Boston, MA
- 11/75-1/77 **Research Assistant/Research Supervisor**, Task Centered Treatment Project  
University of Chicago, Chicago, IL
- 6/74-1/75 **Counselor**, Philadelphia Child Guidance Clinic, Philadelphia, PA

## **EDUCATION:**

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- 1990 **Ph.D.** in Psychology, Boston University, Boston, MA  
1977 **A.M.**, School of Social Service Administration, University of Chicago, Chicago, IL  
1974 **A.B.**, With Honors in Social Relations, Colgate University, Hamilton, NY

## **BOARD, PROFESSIONAL and COMMUNITY AFFILIATIONS:**

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- 2008 - Present President, BasicNeeds US, Inc.  
2008 - 2014 Co-Chair, SAMHSA – CMHS Building Bridges Outcomes Workgroup  
2006 - 2008 Board Member, Consumers for Health Care Choices, Inc.  
2004 - 2005 Co-Chair, Lexington Health Benefits Review Committee, Lexington, MA  
2003 - 2005 Treasurer, American College of Mental Health Administration and the ACMHA Foundation  
2003 Chair, American College of Mental Health Administration 2003 Summit, “Reducing Disparities: Achieving Equity in Behavioral Health Services  
2002 - 2012 Treasurer, Hancock Church, Lexington Massachusetts  
2001 - 2013 Outcomes Roundtable for Children and Families; Co-Chair, Performance Measures Committee  
2000 - 2004 Member, Children in Managed Care Advisory Committee, Center for Health Care Strategies  
2000 - 2012 Treasurer, Van Go Project Inc.  
2000 - 2003 Member, Board of Directors, Community Music Center of Boston  
1996 - 2000 President, Board of Directors, Community Music Center of Boston  
1991 - 1995 Treasurer, Community Music Center of Boston  
1988 - 1994 Chairperson, Allocations Coordinating Committee 1992-4; Member, Planning and Resource Mgmt. Committee, Discretionary Fund; Member, Allocations Coordinating Committee, United Way of Mass. Bay  
1988 - 1991 Human Services Committee, Town of Lexington, MA  
1985 - 1987 Board of Directors, National Mentor, Inc.

1982 - 1985 Board of Directors, Massachusetts Council of Human Service Providers  
1982 - 1985 Negotiation Committee, Executive Office of Human Services - Mass. Council of Human Service Providers  
1980 - 1982 Rate Setting Task Force, Subcommittee of the EOHS Negotiating Committee

## **AWARD:**

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2011 Barton Distinguished Fellow Award, ACMHA: College of Behavioral Health Leadership

## **MEMBERSHIPS:**

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ACMHA: The College of Behavioral Health Leadership; Boston Athenaeum

## **PUBLICATIONS and PUBLIC REPORTS:**

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Dougherty, R., Lyman, D.R., George, P, Ghose, S., Daniels, A., Delphin-Rittmon, M. *Assessing the Evidence Base for Behavioral Health Services: Introduction to the Series*, Psychiatric Services in Advance, October 21, 2013. Authorship and editorial responsibility for all publications in the 13 article series published from October 2013 to June 2014.

Dougherty, R., Strod, D., Fisher, S., Broderick, S, and Lieberman, R. “*Tracking Long-Term Strength-Based Outcomes*” in Blau, G, Lieberman, R. and Caldwell, B. (eds.) *Best Practices In Residential: A Roadmap To Improve Long-Term Outcomes*, 2014.

Dougherty, R. and Strod, D. “*Building Consensus on Residential Measures: Recommendations for Outcomes and Performance Measures*”. Building Bridges Initiative. March, 2014.

Public Consulting Group, DMA Health Strategies and Civic Initiatives. “*Analysis of the Texas Public Behavioral Health System: Recommendations for System Redesign*”. October, 2012.

Perlman, S., Dougherty, R., Diamond, R., Bledsoe, C., Shauer, C. & del Vecchio, P. (2011). “*Supplement 3: Aids to Assist Shared Decision Making in Mental Health Care*” in the report *Shared Decision-Making in Mental Health Care: Practice, Research, and Future Directions*. (HHS Publication No. SMA-09-4371). Rockville, MD: Center for Mental Health Services, Substance Abuse and Mental Health Services Administration.

“Detroit-Wayne County Community Mental Health Agency: MCPN Options for Redesign.” March 2011.

The Lewin Group and DMA Health Strategies. “*Stay Well Stay Working Research Briefs*”. Minnesota Department of Human Services, October 2010. (See <http://www.staywellstayworking.com/> - DMA Briefs include: SWSW Business Case for Public Sector Investment; Opportunities to Apply Effective Components of Stay Well, Stay Working to Populations with Similar Needs; Contracting to Manage Work and Wellness: New Roles for Managed Care Organizations; Interagency Collaboration and Financing Strategies

“Massachusetts Taxpayer’s Foundation and DMA Health Strategies”. *The Utility of Trouble: Maximizing the Value of Our Human Services Dollars*. The Boston Foundation and the Massachusetts Taxpayers Foundation, June 2010.

The Lewin Group, Inc. and DMA Health Strategies. “*Assessing Children’s Mental Health Services in Massachusetts: Workforce Capacity Assessment*”. Blue Cross Blue Shield of Massachusetts Foundation, October, 2009.

Dougherty, Richard H. “*Improving Care: Options for Redesign of Washington’s Mental Health System*” Washington State Department of Social and Health Services, Health and Recovery Administration, Mental Health Division. April 2009.

Dougherty, Richard H. “*New York Office of Mental Health: Ambulatory Restructuring Project Report*”. New York Office of Mental Health. June 2009.

Dougherty, Richard H. "Reducing Disparities" ACMHA Armchair Reflections, American College of Mental Health Administration, February 2009 (see [http://nned.net/docs-general/Dougherty\\_Reducing\\_Disparities\\_012609.pdf](http://nned.net/docs-general/Dougherty_Reducing_Disparities_012609.pdf)).

DMA Health Strategies. "Financial Health of Providers in Mass. Human Service System". Executive Office of Health & Human Services, Commonwealth of Massachusetts, October 2007.

Dougherty, Richard H. "Self-Directed Behavioral Health Care: Where is it Directed?" *Mental Health Weekly*, May 14, 2007.

Cohen, Edward, Adams, Neal, Dougherty, Richard, et al. "The Intersection of Transformation and Quality in Mental Health Treatment: Implementing the California Learning Collaborative". *International Journal of Mental Health*: 36, 2, Summer 2007.

Perlman, Sylvia and Dougherty, Richard. "State Behavioral Health Innovations: Disseminating Promising Practices". Commonwealth Fund: August 2006.

The Massachusetts OxyContin and Other Drug Abuse Commission - Final Report. Massachusetts Legislative Commission on OxyContin and Other Prescription Drug Abuse, July, 2006.

"Mental Health: The Business Case - Treatment Works . . . People Recover!" Ohio Department of Mental Health, A New Day Ohio Campaign. August 3, 2005.

Dougherty, Richard H. "Consumer Directed Health Care: Static or Buzz?" *Behavioral Healthcare Tomorrow*, August 2005.

Dougherty Richard H. "From the Field" Editorial on Community Resiliency in *Mental Health Weekly*, July 18, 2005.

Daniels, Allen; Adams, Neal and Dougherty Richard. "Crossing the Quality Chasm: Reforming Behavioral Health Services through Community Collaborations." *International Journal of Mental Health*. Vol.34, No.1: Spring 2005.

Bishop, Adrian and Dougherty, Richard. "Business Process Leadership: Foundations for Transformation". *Behavioral Healthcare Tomorrow*: June 2005.

Dougherty, Richard H. "Free to Choose: Transforming Behavioral Health Care" DHHS Publication No. SMA-05-3982. Rockville, MD: Center for Mental Health Services, Substance Abuse and Mental Health Services Administration, 2005.

Bishop, Adrian and Dougherty, Richard. "Implementing Continuous Quality Improvement at the Health Care Provider Level". *Behavioral Healthcare Tomorrow*: February 2005.

Gelber, Suzanne and Dougherty, Richard. "Disease Management for Chronic Behavioral Health and Substance Abuse Disorders". Center for Health Care Strategies, Lawrenceville, NJ: February 2005.

Dougherty, Richard H. "Behavioral Pharmacy Benefit Management: Case Studies". Center for Health Care Strategies, Lawrenceville, NJ: December 2004.

Bishop, Adrian and Dougherty, Richard. "Does the Mental Health System Need its Own Apollo Program? Necessary Steps for Mental Health Transformation". In *Executive Forecast: Strategic Analysis of 2005 Trends*. Manisses Communications Group, Inc., January 2005.

Dougherty, Richard H. "Reducing Disparity in Behavioral Health Services: A Report from the American College of Mental Health Administration". *Administration and Policy in Mental Health*, Vol.31, No. 3: January 2004.

Dougherty, Richard H. "Consumer Directed Health Care: The Next Trend" *Behavioral Healthcare Tomorrow*. June 2003.

Dougherty, Richard H. "Reprocurement: The Role of Competition in Changing Public Managed Behavioral Health Systems". Center for Health Care Strategies, Lawrenceville, NJ. May 2003.

Nechasek, Sara L.; Perlman, Sylvia; and Dougherty, Richard H. "Children's Mental Health Benchmarking Project: Year Two of a National Research Effort" in 15<sup>th</sup> Annual Proceedings: A System of Care for Children's Mental Health: expanding the Research Base. The Research and Training Center for Children's Mental Health, Tampa FL., 2003. pp. 45-48.

Perlman, Sylvia, B.; Nechasek, Sara, L. and Dougherty, Richard H. "The Children's Mental Health Benchmarking Project" Data Matters, Georgetown University, Spring/Summer 2002, Issue #5.

Dougherty, Richard H. and Boughtin, Anne. "TennCare Partners: Behavioral Health Reprourement Strategies". Center for Health Care Strategies and TennCare, Lawrenceville, NJ: April 17, 2002.

Perlman, Sylvia; Nechasek, Sara and Dougherty, Richard H. "The Children's Mental Health Benchmarking Project: Second Year Report", Funded by the Annie E. Casey Foundation. May 2002.

Perlman, Sylvia; Nechasek, Sara and Dougherty, Richard H. "Progress and Potential: Comparing State, County Systems Proves Challenging" Behavioral Healthcare Tomorrow, June 2001.

Perlman, Sylvia; Nechasek, Sara and Dougherty, Richard H. "The Children's Mental Health Benchmarking Project: First Year Report", Funded by the Annie E. Casey Foundation. September 28, 2000.

Dougherty, Richard H. "The 'Business Models' for the Delivery of Public Managed Behavioral Health Care: An Assessment". 1999 Medicaid Managed Behavioral Healthcare Sourcebook. Faulkner and Gray, New York: 1998.

Palmer, Charles, M.; Powell-Woodson, Doruthula and Dougherty, Richard. "Building Better Bridges: Avoiding Litigation in Public-Private Contracts". Interviews in Behavioral Healthcare Tomorrow, February 1998.

Dougherty Management Associates, Inc. "Medicaid Managed Care for People with Disabilities: Strategic Options". Massachusetts Division of Medical Assistance and Center for Healthcare Strategies. September 1997.

Dougherty, Richard H. "Public Behavioral Healthcare: Managing to Change " Behavioral Healthcare Tomorrow, February 1997.

Dougherty, Richard H. "Managed Behavioral Healthcare Procurement: Design, Financing, Procurement and Monitoring of Managed Behavioral Healthcare Plans". U.S. Center for Mental Health Services, November 1996.

Dougherty, Richard H. "Vouchers and Consumer Choice in Purchasing Publicly Funded Human Services: Economic Analysis and Implementation Guidelines" Reason Foundation, Los Angeles, CA: January 1996.

Dougherty, Richard H.; and Campbell, Philip. "Evaluation of Organizational Characteristics and Management Practices among Contracted Provider Agencies". Massachusetts Department of Mental Retardation, November 1995.

Dougherty Management Associates, Inc. "Evaluation of Product Based Purchased Adoption Services". Massachusetts Department of Social Services, March 1995.

Dougherty Management Associates, Inc. "Massachusetts Board of Registration in Medicine: Quality of Care Unit Design". Massachusetts Board of Registration in Medicine, June 1994.

Dougherty Management Associates, Inc. "Comprehensive Case Support Program: A Proposal" Massachusetts Division of Medical Assistance, November 22, 1993.

Dougherty Management Associates, Inc. "Selected State Medicaid Case Management Programs: A Summary". Massachusetts Department of Public Welfare, Medicaid Division, June 1993.

Dougherty Management Associates, Inc. "Massachusetts Department of Mental Retardation 1993 Employee Opinion Results". Massachusetts Department of Mental Retardation May 1993.

Dougherty Management Associates, Inc. "1991 Mental Health and Substance Abuse Utilization Data: A Baseline Study". Massachusetts Department of Public Welfare, November 1991.

Dougherty Management Associates, Inc. "A Survey of Medicaid Managed Mental Health Systems in the United States". Medicaid Division, Massachusetts Department of Public Welfare, November 1991.

Dougherty, Richard H. and Billings, Charles A. "Voucher Purchasing Systems: Enhancing Consumer Choice and Market Forces in Human Services" in *Invitation for Change*. Pioneer Institute, Boston, MA: 1991

Dougherty Management Associates, Inc., "A System for Standardized Program Classification and Uniform Contract Monitoring." Mass. Division of Purchased Services, June 1990.

Dougherty Management Associates, Inc., "Section 44 Special Education Program Compliance Review: X-Cycle Schools." Mass. Division of Purchased Services, December 1990, Publication # 16,529-156.

Dougherty, Richard H. "Perceptions of Distributive and Procedural Justice in Relation to Organizational and Functional Role". Ph.D. Dissertation, Boston University: 1990.

Dougherty Management Associates, Inc. and the Office of Purchased Services, Executive Office of Administration and Finance. "What Is Fair: Perceptions and Determinants of Fairness in the Massachusetts Purchase of Service System". Boston, MA: 1989.

Massachusetts Council of Human Service Providers, "Confronting Effectiveness: Social Investment in Massachusetts". Boston, MA: 1988.

Massachusetts Council of Human Service Providers, "An Agenda for the Reform of the Purchase of Service System in Massachusetts". Platform paper for the 1983 MCHSP Annual Convention.

"Organizational Feedback Management: Social Psychological Processes of Information Management and Decision Making in Organizations." For Ph.D. candidacy. Boston University, Psychology Department, 1983.

Dougherty, Richard H., Friedman, B., Pinkston, E. M. "An Analysis of Time-Out and Response-Cost Procedures in a Special Education Classroom" in Pinkston, Elsie, M., et al (eds). *Effective Social Work Practice*. San Francisco: Jossey-Bass, 1982, pp. 320 -341.

Massachusetts Department of Public Welfare, Purchase of Service Evaluation Unit. "The Protective Services Case Management Programs: A Descriptive Study". September 1979.

## **CONFERENCES and PRESENTATIONS:**

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"Charting a Course for Community Behavioral Health". ServiceNet Annual Board meeting, February, 2016.

"Integration and the Continuum of Care in the New Frontier: Community Conversation on Mental Health". Optum Pierce RSN, June 2015

"What Services will Certified Community Behavioral Health Clinics Deliver?" with Dale Jarvis. National Council for Community Behavioral Health. Las Vegas, March, 2015.

"Driving Transformation through Outcomes Measurement: Performance measures, experience of care, and functional outcomes". Alliance for Strong Families and Communities, Residential Transformation Cohort Webinar, January, 2015

"Delivering Innovation: Focused Factories, Integrated Practice Units and Centers of Excellence in Behavioral Health" Keynote Address, Mental Health Corporations of America. November, 2014.

"Using Performance Measurement to Improve Outcomes: Utilization, Cost, and Quality". Georgetown 2014 Training Institutes, Washington DC: July 18/19, 2014.

"Integrated Specialty Practice Units: New Delivery Strategies for Behavioral Health". 2014 Knowledge Network Summit, Washington, DC, May, 2014.

“Next Practices in Scaling Housing through the Affordable Care Act”. Next Practices Roundtable, Mass Housing and Shelter Alliance and The American Roundtable to Abolish Homelessness. October 24, 2013.

“Innovations in Integration” Indiana Council of Community Mental Health Centers, Inc, Annual Meeting, May 9, 2013.

“How to Build a Safety Net Accountable Care Organization Boot Camp”. National Council for Community Behavioral Health Care. Preconference with Dale Jarvis, Bruce Abel and Robin Henderson. March 2013.

“Specialty Services and ACOs”. Michigan CMH/PIHP and CA Planning Meeting, December 12, 2012.

“Outcomes Tip Sheet”. Webinar, Building Bridges Initiative, October 11, 2012

“Economics of Systems of Care: Sharing What We Know from Research and Practice” Poster Session, National Training Institutes, Orlando, July 2012.

BasicNeeds Mental Health and Development: Capacity Building”. Poster Session, Unite for Sight Annual Conference: New Haven CT, June, 2012.

BasicNeeds: Case Studies in the Mental Health and Development Model: Building on Local Voices”. American Psychological Association, Psychology Day at the United Nations, April, 2012.

“Not Your Father’s Managed Care”. Panel Discussion, Chair. National Council for Community Behavioral Health, Annual Meeting, Chicago IL, April 16, 2012.

BasicNeeds: Case Studies in the Mental Health and Development Model: Building on Local Voices”. National Council for Community Behavioral Health, Annual Meeting, Chicago IL, April 16, 2012.

BasicNeeds Mental Health and Development: Capacity Building”. Poster Session, ACMHA: The College for Behavioral Health Leadership: Charleston, SC, March , 2012.

“Reforming Healthcare : Integrating Care for Dual Eligibles”, Association for Behavioral Health Annual Meeting, February 14, 2012.

“Reforming Healthcare: Coordinating Care in an Integrated Delivery System”, Piedmont Behavioral HealthCare Board Meeting, October 27, 2011.

“Peers in Health Homes” Pillars of Peer Support Conference, Carter Center, September 26, 2011.

“Building Individual Family and Community Capacity for Mental Health: BasicNeeds, Poster Session, International Initiative for Mental Health Leadership, San Francisco, September 2011.

“HealthCare reform and National Trends”. Pierce County Community Conversation, Pierce County Regional Support Network, August 11, 2011.

“Health Homes Learning Collaborative” Kickoff presentation. New York Association of Psychosocial Rehabilitation Services, July, 2011.

Managing Behavioral HealthCare for Healthy Communities: NYC Health and Hospitals Corporation, June 9, 2011.

“Recovery Homes: Recovery and Health Homes Under Health Reform” New York Association of Psychosocial Rehabilitation Services, Executive Seminar, April, 2011

“HealthCare Reform: The Context, Health Homes, and Accountable Care Organizations”. New York Association of Psychosocial Rehabilitation Services, Delegates Meetign, March 2011.

“Health Reform: What Can Behavioral Health Expect from the Affordable Care Act?”. Mental Health Corporations of America: Keynote Address, Winter Meeting: Clearwater FL: February 23, 2011.

“Health Reform: What Can Behavioral Health Expect from the Affordable Care Act?”. MA Association for Behavioral Healthcare, Members Meeting: December 14, 2010.

“BasicNeeds: Community Mental Health Capacity Building in Developing Countries: New Role for Community Psychiatry”. U.S. Psychiatric and Mental Health Congress, Orlando, FL: November 19, 2010.

“BasicNeeds: The Model of Mental Health and Development”. Poster Session, Sixth World Conference on the Promotion of Mental Health and the Prevention of Mental and Behavioral Disorders, Washington, DC: November 17, 2010

“Health Reform: Where do we go from here?” Plenary Address, Case Western Center for Evidence Based Practices Conference 2010: Sustaining Evidence Based Practices, Columbus, OH: October 12, 2010.

“Implementation of Self-Directed Care Initiatives: Innovations in Self-Directed Services”. New York Association of Psychosocial Rehabilitation Services, Executive Seminar on Systems Transformation, April 23, 2009.

“Federal Medicaid Incentives for Recovery: An Update”. New York Association of Psychosocial Rehabilitation Services, Executive Seminar on Systems Transformation, April 23, 2009.

“The Four Divas: Leadership 2009 - Moderator”. National Council for Community Behavioral Health Annual Meeting, April 8, 2009.

“From Advocacy to Entrepreneurship: Case Studies in Consumer Operated Business Strategies” National Council for Community Behavioral Health Annual Meeting, April 8, 2009.

“Building Bridges”. National Conference, Research and Training Center for Children’s Mental Health, March 3, 2009.

“Ambulatory Restructuring Project: New York Office of Mental Health.” New York Association of Psychosocial Rehabilitation Providers Annual Conference, September 23, 2008.

“Self-Directed Care”. New York Association of Psychosocial Rehabilitation Providers Annual Conference, September 23, 2008.

“Organizing and Financing Mental Health Services in Medicaid Models of Service Delivery and Financing”. South Carolina Medicaid Managed Care Conference, University of South Carolina, Columbia: October 16, 2008.

“Accomplishments and Challenges in Medicaid Mental Health Services: Innovation, Financing and Change.” Medicaid Congress, Washington DC: June 5, 2008.

“Organizing and Financing Mental Health Services - Moving Forward: Designing and Financing Effective Mental Health Services in an Era of Transformation”. The Center for Health Program Development and Management, University of Maryland Baltimore Campus; May, 2007.

“Managing for Change”. National Council for Community Behavioral Health Annual Meeting, March 27, 2007.

Chronic Disease Management: Collaborative Strategies to Implement Clinical Guidelines”. National Council for Community Behavioral Health Annual Meeting, March 26, 2007.

“Managing Care: Innovations and Challenges in the Delivery and Management of Behavioral Health Services”. The Crossroads of Healthcare: Finding Solutions to Critical Issues, Foundations Associates” August 9, 2006.

“TennCare Behavioral Health: Models for Managing Care” National Conference of State Legislators, Nashville, TN: August 14, 2006.

“Transforming Behavioral Health: Examples from Other States”. Maricopa County Town Meeting, Arizona Division of Behavioral Health Services, May 22, 2006.

“Overview of Managed Care Reforms and Innovations” Alabama Mental Health Providers Association, Strategic Planning, May 10-11, 2006.

“Managing Change”. National Council of Community Behavioral Health, Learning Lab. March, 2006.

“Transformation of Children’s Behavioral Health Systems” Philadelphia Department of Behavioral Health and Mental Retardation Services, Blue Ribbon Commission for Children’s Behavioral Health. February 2, 2006.

“Collaborating for Quality: Behavioral Health Integration for Children and Families in the Florida Child Welfare System”. Florida Department of Children Youth and Families: Statewide Meeting. January 17-18, 2006. “The Board’s Role in Quality”. National Council of Community Behavioral Healthcare, 35<sup>th</sup> Annual Training Conference, March 12-15, 2005.

“Benchmarking Children’s Mental Health System Performance: Investigating reasons for variation”. 2004 Joint National Conference on Mental Health Block Grant and National Conference on Mental Health Statistics. June 2, 2004, Washington, DC.

“Financing Strategies: Treatment Foster Care and Related Services”. Foster Family-based Treatment Association – Annual Meeting. February 26, 2004, Washington, DC.

“Geographic Disparities Among States in Access, Utilization and Spending for Children’s Mental Health Services”. Winter 2004 System of Care Community Meeting, San Antonio, January 15, 2004.

“Children’s Mental Health Benchmarking Project - Third Year Report”. Annie E. Casey Foundation, Kids Count Annual Meeting, September 2003.

“Checking Your Financial Pulse: Benchmarking of Key Fiscal Indicators” with Wendy Holt and Philip Shea. Annual Training Conference: National Council of Community Behavioral Health. March 31, 2003.

“Disparities in Access and Utilization of Children’s Mental Health Services”, 16<sup>th</sup> Annual Research Conference: A System of Care for Children’s Mental Health: Expanding the Research Base. Tampa, FL, March 3, 2003

Co-Chair, Behavioral Health and Informatics Tomorrow, Public Sector Track. Washington, DC. Sept. 2002.

“Kids Outcomes: Children’s Mental Health Benchmarking Project: Year Two”. National Council of Community Behavioral Health, 2002 Training Institute. March 24, 2002.

“Overseeing Children’s Mental Health Systems: Performance Measurement and Benchmarking” NASMHPD Research Institute Annual Conference. February 11, 2002.

“The Wilsons: Trouble in the State of Grace. A Case Study” Children with Special Needs Purchasing Institute, Center for Health Care Strategies, November 14, 2001.

“Health Network Portals”. 2001 National MMIS Conference, Nashua NH. August 29, 2001.

“Children’s Mental Health Benchmarking Project: Using Common Indicators to Compare States” National Academy of State Health Policy, 14<sup>th</sup> Annual State Health Policy Conference, Poster Session. August 13-14, 2001.

“Applying Managed Care Technologies to Systems of Care”, Training Institutes 2000, National Technical Assistance Center for Children’s Mental Health, Georgetown University. New Orleans, June 9-13, 2000.

“Designing and Implementing Managed Care and Children’s Systems of Care in San Diego”. Opening the Doors: Children’s Interagency System of Care Development in a Managed Care Environment, California Institute for Mental Health, July 9, 1998. Oakland, CA.

“Pricing Services for Children and Adolescents in Managed Care Systems” and “Principles of Managed Care for Local Children’s Mental Health Systems of Care”. 1998 Training Institutes: Developing Local Systems of Care in a Managed Care Environment, Georgetown University, June 13-17, 1998. Orlando FL.

“History of Litigation in Behavioral Healthcare: Closing the Loopholes in Procurement”. CentraLink Public-Private Summit May 8, 1998. Washington, DC.

"Simulation: Developing Appropriate Capitation Rates and Risk Sharing Arrangements for Medicaid Behavioral Health Care", With Anthony Broskowski. Public - Private Partnership Skills, Nov. 3-4, 1997, Phoenix, AZ.

"Approaching the Next Millennium". The Massachusetts Alcohol and Drug Abuse Association Annual Meeting, October 21, 1997, Framingham, MA.

"Public Behavioral Health Care - Managing Change", "System Redesign and Stakeholder Involvement: San Diego County's Adult Mental Health System and the Heartbeat Initiative", and Procurement in Managed Care: Getting What You Need and Avoiding Litigation". Michigan Association of Community Mental Health Boards, Annual Meeting, October 14, 1997, Traverse City MI.

"Public - Private Sector Roles for State Carve-Outs". Institute on Mental Health Management Information. New York Office of Mental Health, August 6, 1997.

"Legal Issues in Managed Care Procurements". National Association of State Mental Health Program Directors. Breckenridge, CO. July 15, 1997.

"Public - Private Sector Roles for State Carve-Outs" Mental Health Statistics Improvement Program, 1997 National Conference, May 29, 1997.

"Shared Risk and Financing Strategies in Child Welfare Systems". Presentation to the Child Prototype Workgroup, May 14, 1997, Washington, DC.

"Cost Management and Organizational Change Strategies for Community-Based Providers" The Public/Private Behavioral Health care Summit, May 3, 1997.

"Building and Managing Social HMOs for Public Sector Populations with Special Needs" The Public/Private Behavioral Health care Summit, May 1, 1997.

"Integrating Incentives and Shared Risk to Improve Quality in Child Welfare Systems" Health Care Institute, Institute for International Research, Boston, MA: April 3, 1997

"Financing Capitation and Risk-Sharing". Managed Care Conference. National Technical Assistance Center on Children's Mental Health, Georgetown University, Washington, DC: January 31, 1997.

"How to Write an RFP and Determine Appropriate Pricing Structures for Public Managed Behavioral Care Programs". Conference on How to Acquire, Implement and Administer Managed Behavioral Healthcare Services. CentralLink, December 1996.

"Regional Public/Private Partnerships: Issues for Publicly Funded Services". Public/Private Regional Symposia, Clearwater Beach. CentralLink, October. 1996.

"Managing Managed Care: From RFPs to Contracting for Performance". 38th Southern Regional Conference on Mental Health Statistics, New Orleans. September 1996

"Designing and Implementing Managed Care Systems: Financing and Reimbursement Issues". Training Institute: Developing Local Systems of Care in a Managed Care Environment. National Technical Assistance Center for Children's Mental Health, Georgetown University, June 9-13, 1996.

"How to Write an RFP and Determine Appropriate Pricing Structures for Public Managed Behavioral Care Programs". 1996 National Conference on Mental Health Statistics. Center for Mental Health Services, May 30, 1996.

"RFP and Vendor Selection: How to Write a Public Purchaser RFP, Select Your Vendor and Conduct Post Procurement Audits", Pre-Conference Executive Seminar. "Managing Organizational Change in Public Sector Managed Care", Dialogue Group. "How to Identify and Manage Key Legal and Regulatory Challenges", Dialogue Facilitator. Public-Private Behavioral Healthcare Summit, CentralLink: May 9, 1996.

"Quality's Closest Relationships", Panelist. 4th Annual DMR Conference, April 8, 1996.

"Capitation, Risk Sharing and Stop Loss" Managed Care Conference. National Technical Assistance Center on Children's Mental Health, Georgetown University: January 28-30, 1996.

"How Write an RFP for Managed Behavioral Health Care Services" CentraLink - Institute for Behavioral Health Care. Washington, DC, December 1995

"Voucher Purchasing for Health and Human Services: New Opportunities for Market Based Procurement". 21st Century Government: Smaller, Better and Closer to Home. Reason Foundation, Philadelphia, Pa. September 18, 1995.

"Developing Capitation Contracts in Behavioral Healthcare", Discussant. Public Private Behavioral Healthcare Summit, McLean VA. Institute for Behavioral Healthcare: May 1995.

"Employee and Customer Satisfaction Surveys: An Overview" Mass. Council of Human Service Providers Annual Meeting, March 8, 1995.

"Economics of Managed Care" Salem State College, October 12, 1994.

"Medicaid Managed Care Initiatives", Pennsylvania Child and Youth Administrators Managed Care Conference, Harrisburg, PA. September 14, 1994.

"Service Quality Management" Kennedy Center and the Connecticut Department of Mental Retardation, April 16, 1993.

"Service Quality Management" 1992 Massachusetts MR Providers Council Annual Conference.

"Service Quality Management" Massachusetts Department of Mental Retardation Senior Management, June 2-4, 1992.

"Impact Evaluation: How to Measure the Outcomes of Human Services" United Way of Massachusetts Bay, December 12, 1991.

"Negotiating a Quality Solution" 1991 Excellence in Health Care Conference. Health Care Financing Administration Region 1, December 6, 1991.

"Facilitator Training" American Stock Exchange Facilitation Teams, April 1991.

"Managed Mental Health and Substance Abuse Programs", Presented to the Annual Meeting of the Massachusetts Association of Approved Private Schools, 1991