SESSION TITLE: Using What You’ve Got! Leadership, Workforce, and Data

Does your session fall into one of the following focus areas? (Check all that apply):

[X] Fiscal success in a fee-for-service world – tips on what to do and what to avoid
[X] Working in a value-based system
[ ] Certified Community Behavioral Health Clinics – challenges, opportunities, successes
[X] Working with managed care companies
[X] Integrated Care – successful models, overcoming barriers, creative solutions
[ ] Hospital/Community Partnerships
[X] Community Support Services – making it work
[ ] Collaborations, affiliations, mergers – share your experience

PRESENTER:

Full Name: David Bucciferro
Title: Senior Advisor
Organization Name and Address: Foothold Technology, 36 East 12th Street, 5th Floor, New York, NY 10003
E-mail Address: marketing@footholdtechnology.com
Office Phone: 212-780-1450
Social Work License #: (if not applicable, please put NA) NA

BRIEF BIOGRAPHY:

David Bucciferro has been a driving force in mental health services for more than 30 years. He is the former Director of Rehabilitation Services with the New York State Office of Mental Health, Bureau of Program Coordination and Support, where he specialized in helping programs improve their program and fiscal performance while retaining their core values. As Senior Advisor to Foothold Technology, he trains providers across the country and brings a visionary yet practical insight into program development, budgeting, performance management, and compliance culled from a distinguished career in mental health services. David is an engaging speaker who has presented workshops throughout the country, has been asked to join panel discussions, and always draws a crowd on Foothold Technology’s educational webinars. David graduated from Siena College with a Bachelor of Science in Chemistry and was trained in Psychiatric Rehabilitation by the Boston University Center for Psychiatric Rehabilitation.
CO-PRESENTER:

Full Name: Robert N. Davison, MA, LPC
Title: Chief Executive Officer
Organization Name and Address: Mental Health Association of Essex and Morris, Inc.
33 So. Fullerton Ave., Montclair, NJ 07042
E-mail Address: rdavison@mhaessexmorris.org
Office Phone: 973-509-97777

BRIEF BIOGRAPHY:

Robert N. Davison, Chief Executive Officer of the Montclair, NJ-based Mental Health Association of Essex and Morris, is an accomplished professional who has been serving the mental health needs of communities throughout New Jersey for more than two decades. In his role as CEO, Mr. Davison manages the overall operations of comprehensive community mental health in the largest service area in the State of New Jersey. A staunch advocate for humane, compassionate, and ethical treatment of individuals who suffer from mental illness, Mr. Davison has helped to establish the Mental Health Association of Essex and Morris as one of the state’s premiere service providers. In addition to his professional service, Mr. Davison maintains his interest in community issues in a variety of other ways. He is a founding Board member of the Newark-based Partnership for Children of Essex County, a child-welfare agency, and is also a founding member and past president of Advance Housing, a community-based organization whose mission is to provide independent, normalized living arrangements for individuals with mental illnesses. Mr. Davison is a former 3-term councilman in Caldwell and a former member of the Board of Trustees of The Bridge, Inc., a non-profit family service agency based in Caldwell. A 1984 graduate of Seton Hall University, Mr. Davison received his Master’s Degree in Counseling from Montclair State University in 1990. In addition to his academic credentials, Davison is a Licensed Professional Counselor (L.P.C.). Davison resides in Caldwell with his wife, Barbara, and their three children.

SESSION INFORMATION:

Target Audience: (e.g. Social Workers, Counselors, Management, Fiscal, etc. – specify all that apply)
Social Workers, Counselors, Management

This session is designed for direct care staff, program directors, strategic planners and agency management seeking ways to improve individual outcomes and achieve an organization’s long-term goals.

Audience Target Levels: (Please specify all that apply)

___ Beginner  ___ Intermediate  ___ Advanced
WORKSHOP DESCRIPTION:

Whether you operate in a Managed Care, Value-Based Payment, or Fee-For-Service environment, to thrive in today's world of healthcare your agency needs to demonstrate reduced costs, improved outcomes, and a positive experience for those you serve. Where do you start and how do you get there? Like a three legged stool, when an agency combines strong leadership, a skilled workforce, and data, it can find the stability it needs to successfully navigate change and effectively market its results to funders. In this session, we’ll take a closer look at each of the three principles and demonstrate how using data to drive decision-making can support leaders, develop an agency’s workforce, and provide insight into the overall performance of an agency’s programs and services. Attendees will gain insight from a global and individual provider perspective. Attend this session to learn replicable tools and gain concrete tips for you to elevate your agency’s impact internally and for those you serve.

LEARNING OBJECTIVES:

- A minimum of three (3) learning objectives is required.
- Each learning objective needs to be framed using a measurable and behaviorally observable verb like: define, classify, calculate, debate, and analyze. Stay away from vague verbs like learn and understand.
- Each learning objective should be brief.

At the end of this session, attendees will be able to:

1. Participants will be able to implement practices and measures to improve efficiency and effectiveness at all levels of the organizations, including administratively, clinically and from a support perspective.
2. Participants will gauge their agency’s technical readiness to generate reports that can inform all aspects of their agency’s operations and service provision in a fee for service environment.
3. Participants will learn how to leverage their data in order to develop strategic partnerships and gain additional revenue streams.
4. Participants will be able to develop strategic plans to address readiness and operational workloads in an environment of Fee-For-Service, Managed Care and/or Value-Based Payments.

Indicate the type of credits this session is appropriate for:

____ Clinical    ____ Non-clinical    ____ Ethics    ____ Social and Cultural Competence

COURSE CONTENT: Provide an outline that identifies your discussion topics and any planned activities. You should be able to easily compile a list from your course description and objectives.

1. Introductions
2. Overview of the Changing Landscape
3. Requirements and Standards
4. Participants develop hypothetical plan of care using data
   a. Select best practices and tips discussed
   b. Include a focus on metrics
5. Review
6. Q&A
**BIBLIOGRAPHY:** List a minimum of three (3) references (five or more is preferable) as evidence of supporting research (bibliography). **This is a required field in order to offer CEUs.** Bibliography must be in APA format and at least half of the references must be from within the past 5 years.

The presenters will refer to their own 30+ years of experience and will draw from the following selected bibliography:


EXPERIENCE

Senior Advisor
Foothold Technology ~ New York, NY
2012–present
Provides insight and technical expertise to providers and local governments on the use of data collection and evaluations protocols to develop compliance and program standards that drive budgeting, performance management and compliance. Monitors national trends in the behavioral healthcare field to assist Foothold Technology customers with strategies to respond to the ever changing environment. Areas of work include but are not limited to:
• Medicaid/Medicare Regulation
• State Rules and Regulations
• Medicaid/Medicare and other third-party billing
• Stimulus Package, Affordable Care Act, Health Homes, Meaningful Use
• Managed Care
• Documentation/Accountability and Accessibility of PHI
• HIPAA Compliance

Director, Rehabilitation Services Unit
NYS Office of Mental Health, Bureau of Program Coordination and Support ~ Albany, NY
2002–2012
Executive oversight of a multi-divisional and multi-disciplinary design and implementation team charged with the development of a new Medicaid reimbursed integrated outpatient service, Personalized Recovery oriented Services. Responsibilities included:
• Oversight of Program Development
• Medicaid State-Plan and State Regulation Development
• Policy Oversight
• System and Skill Development
• Evaluation Oversight
• Liaison with Electronic Record/Billing Vendors
• Member of Steering Committee for NYS Electronic Record Initiative
• Guidelines Development
• Provider Development
• Received the NYAPRS President Annual Award for Leadership

Special Needs Plan Project Manager
NYS Office of Mental Health, Bureau of Managed Care ~ Albany, N.Y.
1999–2002
Executive oversight of a multi-divisional and multi-disciplinary design and implementation team charged with the development of six Medicaid behavioral health Special Needs Plans (SNPs). Responsibilities included:
• Oversight of Project Plan
• Development of Risk Analysis
• Policy Oversight
• Inter and Intra Agency Coordination
• Process Flow Development
• Providers/Stakeholder Liaison

Special Needs Plan Work Group Team Leader/Group Representative
NYS Office of Mental Health, Bureau of Managed Care ~ Albany, NY
1996–1999
Primary Responsibilities included leadership role in two work groups formed to design the Special Needs Plans Request for Proposal (RFP).

- Team leader and author of the benefits section of the RFP.
  - Design features include:
    - A unique care management structure that incorporates person-centered planning.
    - A benefits package that focuses on rehabilitation and recovery and includes non-traditional services funded through traditional Medicaid and a Clinical Linkage requirement that ensures coordination between behavioral health services and physical health.
    - Additionally, the benefit package includes self-help and community support services thus allowing Medicaid to fund these non-traditional Medicaid services.
- Co-leader in Eligibility and Enrollment Work Group.
  - The highlights associated with this role included the development of eligibility criteria, marketing guidelines, member services guidelines, and enrollment and dis-enrollment.
- Participant in the Quality Assurance Work Group with a primary responsibility of defining the role of Medical Director and Utilization Management.
- Participant in the Data Systems Work Group primarily as a consultant during the development of the oversight reports.
- Participant in the Design Work Group whose function was to determine the scope of the multi-dimensional Special Needs Plans.
- Overall responsibilities during this period included project management, program development, team leadership, interagency liaison, policy development, meeting facilitation, team participation, public presentations, and technical consulting.

Project Manager for Psychiatric Rehabilitation Organization & Staff Development Initiative 1985–1996

NYS Office of Mental Health, Bureau of Psychiatric Rehabilitation, Albany, NY

- Managed a statewide comprehensive initiative to infuse the principles and technology of Recovery and Psychiatric Rehabilitation into the New York system of care.
- Managed a multi-facility training and program development initiative to instill Psychiatric Rehabilitation Services and technology into the State’s 23 Adult Psychiatric Centers and 3 Forensic Facilities.
- This role encompassed budgetary, contracting, materials development, public speaking, training, and monitoring responsibilities as well as oversight responsibilities for the development and support of 25 facility-based multi-disciplinary Train-the-Trainer teams.
- Additional responsibilities included participation in a state work group charged with reducing the state mental health workforce and acting as a liaison with other agency bureaus.

Statewide Coordinator for Community Based Vocational Service 1985–1996

NYS Office of Mental Health, Bureau of Psychiatric Rehabilitation, Albany, NY

- Statewide coordinator of community based vocational services responsible for the development, refinement, funding, oversight, and evaluation of vocational services afforded by community based providers.
- Administrative responsibilities included the development of annual budget requests, spending plans, coordination of annual conferences, development of a joint mental health retardation collection toll, and acting as a liaison with the State Office of Vocational Rehabilitation.
- Programmatic responsibilities included the development of employment programs including integrated employment services, affirmative business, supported employment services, and transitional employment services.
• Oversight responsibilities included the development of an evaluation initiative, preparation of annual reports and statewide presentations while acting in a supervisory position for the regional vocational coordinators.
• Additional responsibilities included program designs for conversion of traditional sheltered workshops to affirmative business, and transitional employment centers.

**Outpatient Reform Initiative Work Group Leader & Implementation Director**  
1990–1995  
NYS Office of Mental Health, Bureau of Psychiatric Rehabilitation  
*Albany, NY*  
• Work Group leader charged with developing a Medicaid-funded service based solely on the principles of psychiatric rehabilitation.
• Co-developer of the Intensive Psychiatric Rehabilitation Treatment program (IPRT), a Medicaid-funded program based on the principles and technology of the Boston University Psychiatric Rehabilitation approach.
• Specifically responsible for the development of the service structure, participating in the rewrite of the state plan to capture Medicaid funding, development of state regulation and the promulgation of these regulations, and the negotiations with the oversight state agencies.
• Implementation Director for the IPRT initiative with the responsibilities for administrative oversight, program development, system infusion, provider readiness, and monitoring.

Specific responsibilities included:
• The development of a request for proposal to procure IPRT services through the state.
• Supervision of field operations staff.
• Development of a training initiative with Boston Center for Psychiatric Rehabilitation to train and prepare practitioners and program administrators.
• Oversee the implementation of 70 IPRT programs statewide.
• Additional responsibilities included the participation in a work group charged with redesigning the state uniform case record that would include a person-centered planning document (Individual Service Plan), and participation in work groups designed to infuse psychiatric rehabilitation into the entire service array.

**Senior Budget Analyst**  
1982–1985  
NYS Office of Mental Health, Bureau of Community Budget Services  
*Albany, NY*  
• Senior Budget Analyst responsible for the development of budgets, spending plans, and contracts.
• Specific budget areas included lead responsibility for local Assistance ($130 Million), the primary non-Medicaid state/county share funding stream for mental health services, the budget for Vocational services ($16 Million) for special employment initiatives, and co-leadership on legislative add-ons.

**EDUCATION**

1973–1977 B.S. Chemistry, Siena College  
* Loudonville, NY*  
1983–present 24 Credit Hours of Graduate Work Completed for a M.S. in Public Health Administration  
1993 Certificate in Psychiatric Rehabilitation from Boston University and New York State

**SELECTED CONFERENCE AND PANEL PRESENTATIONS**

• Association of Jewish Family & Children’s Agencies  
• Alcohol & Substance Abuse Providers of NY  
• Cerebral Palsy Associations of NY  
• Florida Alcohol & Drug Abuse Association  
• Illinois Alcohol and Drug Dependence Association  
• Illinois Association of Rehabilitation Facilities  
• Indiana Association of Rehabilitation Facilities  
• Massachusetts Providers’ Council
- Massachusetts Psychiatric Rehabilitation Association
- National Association for Rural Mental Health
- National Association of the Dually Diagnosed
- National Council for Behavioral Healthcare
- New Hampshire Providers Association
- New Jersey Association of Community Providers
- New York Association of Psychiatric Rehabilitation Services
- New York State Association of Community and Residential Agencies
- New York State Rehabilitation Association
- Ohio Provider Resource Association
- Pennsylvania Association of Psychiatric Rehabilitation Association
- Psychiatric Rehabilitation Association
- Virginia Psychiatric Rehabilitation Association
ROBERT N. DAVISON  
53 Francisco Avenue  
West Caldwell, NJ 07006

PROFESSIONAL EXPERIENCE

Mental Health Association of Essex and Morris, Inc.

Chief Executive Officer – (1999 to present). Responsible for the day-to-day operations of a comprehensive community mental health and addictions agency serving over 8,000 individuals, children and their families a year. Total budget of over 13 million dollars annually, with a staff of 200 professionals. Programs include: outpatient, partial care, supportive employment, case management, in-home services, supportive housing, jail diversion and re-entry and family support. Responsibilities include: board relations, strategic planning, accreditation (CARF), finance, grant writing, community relations, advocacy, fundraising and development.

Comprehensive Behavioral Healthcare, Inc.

Division Director – (1989 to 1999). Responsibilities included over-seeing the day-to-day operation of seven community-based mental health programs, serving psychiatrically disabled adults, adolescents and their families. Treatment modalities included Residential Services (3 adult group homes and an aging-in group home for 17 to 21 year olds), in-home services, a partial care (day) program and a countywide psycho-educational program serving the families of the mentally ill. Total budget of approximately 3 million dollars annually. Supervised a staff of 85 professional and para-professional employees, overseeing program and staff development. Monitored Division of Mental Health Services and Division of Youth and Family Services contracts. Ensured that clinical services were delivered on a daily basis in a consistent and professional manner. Maintained physical plant and motor pool. Responsible for administrative oversight of agency-wide psychiatry, nursing and medication functions. In conjunction with the Medical Director, developed and wrote agency Medical Services, Nursing and Medication Policy and Procedure Manual. Served as Quality Improvement Officer, developed agency-wide plan for improving organizational performance. Served as agency-wide Risk Manager, responsible for coordinating clinical and administrative activities that identify, evaluate and reduce the risk of injury to individuals served, personnel and visitors as well as the risk of loss to the organization itself.

Psychiatric Emergency Screening Program for Bergen County

Assistant Coordinator: (Part-time, 1991 –1994). Responsibilities included supervising a psychiatric emergency screening center that provided crisis intervention/stabilization via the phone, mobile outreach and on-site evaluation in the ER at Bergen Regional Medical Center (formerly Bergen Pines) and other community hospitals. Responsible for supervising line staff and maintaining clinical and administrative consistency in the operation of the program. Program assesses need for psychiatric hospitalization (both voluntary/involuntary), and makes appropriate referrals for either hospitalization or community treatment.

Association of Retarded Citizens/Morris Unit

Behaviorist: (1988 –1989). Responsibilities included providing supervision and training to staff in implementation of behavior management plans and direct care skills to ensure consistency in all phases of the resident’s program including day program, recreation, community and living environment.

Association for Retarded Citizens/New Jersey

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Chancellor Academy


Somerset Hills School


PROFESSIONAL APPOINTMENTS AND AFFILIATIONS

➢ Governor’s Task Force on Mental Health, Chairperson (November 2004 - January, 2006)
   Appointed by Governor Richard J. Codey as chairperson of the Governor’s Task Force on Mental Health. Charged with reviewing New Jersey’s one billion dollar public mental health system and making recommendations for improvement. Report delivered March 31, 2005. Recommendations included a $200 million special needs housing trust fund and $40 million in mental health treatment funding, both of which were passed into law.
   Acted as spokesperson for the administration participating in interviews with numerous T.V., radio and newspaper media outlets in the New Jersey, New York, and Philadelphia markets.

   Board Member, Health-e-Citi, Inc, a Health Information Exchange involving 8 hospitals in Northern New Jersey (2011-2014)

➢ Congressman William Pascrell’s Healthcare Advisory Committee (2006-present)
➢ Board Member, National Council for Behavioral Health (2015-present)
➢ Board Member, New Jersey Association of Mental Health Agencies, Inc. (2001-2005, 2009-2015)
➢ Governor’s Task Force on Police and Suicide (2008 – 2010)
➢ Governor’s Campus Security Task Force (2007 – 2009)
➢ Governor Corzine’s Transition Team. Served as member of Human Services Policy Group. Chaired Behavioral Health (mental health and addictions) subcommittee (2005 – 2006)

VOLUNTEER AND COMMUNITY ACTIVITIES

Leadership Fellow -- Leadership New Jersey, Class of 2003
Participated in a Public Policy fellowship and think tank. Studied numerous issues including criminal justice, education, healthcare, human services, economic development, politics and race.

Served as an elected official. Committee assignments include Personnel (Chair), Budget and Public Safety.

Legislative Aid – Healthcare (2001-2011)
Serve as an aide to Assemblyman John F. McKeon, New Jersey State Legislature.

Advisory Board – St. Catherine Health Care Center (2002-2008)
Served as board member of an organization serving the health care and retirement needs of the Sisters of St. Dominic.

Served on transition team for Health and Rehabilitation Services. Assisted in writing transition team report.

Founding Member and President – Advance Housing, Inc. (1995 – 1999)
Advance Housing, Inc. was incorporated in 1995 by a consortium of mental health residential providers in Bergen County as a means of expanding the continuum of housing options available to consumers. The agency provides independent, normalized living arrangements in the community, coupled with an array of individualized supportive services. As part of the Redirection Plan, Advance Housing received a grant from the Division of Mental Health Services early in 1997 to facilitate the discharge of 34 clients from Greystone Park Psychiatric Hospital into the community. The agency had an annualized budget of $500,000 and a capital budget of 1.3 million.

Board Member, the Bridge, Inc. (1998 – 1999)
Served as a Board Member for non-profit agency providing family and youth counseling, substance abuse services, family preservation services, behavioral health promotion and foster care.

EDUCATION


B.A. Psychology, Seton Hall University, May 1984.

Licensure: Licensed Professional Counselor, New Jersey State Board of Marriage and Family Therapy Examiners/Professional Counselor Examiners Committee.
AWARDS/PROCLAMATIONS

outstanding professional achievement award – montclair state university, college of education and human service, 2015

proclamation: leadership in mental health, presented by governor richard j. codey, 2005

proclamation: mental health advocacy, presented by senator frank r. lautenberg, 2005

proclamation: excellence in mental health services, presented by governor james e. mcgreevy, 2002

proclamation: leadership in mental health, presented by bergen county board of chosen freeholders – 1999

joint legislative resolution: mental health leadership, presented by senator richard j. codey, assemblymen john f. mckeon and mims hackett, 2005

Gabriel M. Anbrosio Mental Health Humanitarian Award, 2015

The Codey Award, presented by Carrier Clinic, 2014

Founders Award, presented by Advance Housing, Inc., 2012

The Nonprofit Innovation Awards – NJBIZ, Finalist in the category of Leadership Excellence – 2010

Leadership Award, Collaborative Support Programs of New Jersey, Inc. Institute for Wellness and Recovery Initiatives, 2007

Leadership in the Advancement of Mental Health Award, presented by New Jersey Mental Health Institute, 2006

Certificate of Commendation, presented by Bergen County Executive, Dennis McNerney, 2005

Certificate of Commendation, presented by Bergen County Executive, William P. Schuber – 1999

Ann Klein Advocate Award, presented by the Community Health Law Project, 2005

Policy Leadership Award, presented by New Jersey Association of Mental Health Agencies, 2005

Golden Bell Leadership Award, presented by Mental Health Association in New Jersey, 2005

Governor Richard J. Codey Mental Health Champion Award, presented by NAMI-NJ, 2005

Dorothea Dix Humanitarian Award, presented by NAMI-Essex County Chapter, 2005

Courage Award, presented by the Care Plus Foundation, 2005

2004 Legislative Advocacy Award, presented by the New Jersey Association of Mental Health Agencies, Inc.