

Appendix F.6 | Resumes

Team Resumes:

(Attached in the following order)

Project Role	Name
Project Manager	Melissa Bailey, MA, LPC Principal, Bowling Business Strategies
Project Lead for Stakeholder Engagement	Kristin Woodlock, RN, BSN, MPA CEO, Woodlock and Associates (<i>subcontractor</i>)
Project Implementation Lead	Ann Ritter, JD, MPH Principal, Bowling Business Strategies
Quantitative Data Analysis Lead	Grace Charles, PhD Data Scientist, Green River Data Analysis (<i>subcontractor</i>)
Clinical Advisor	Kerry King, PsyD, MBA Principal, Bowling Business Strategies
Fiscal Advisor	Phil Prassas, MBA, EdD Managing Principal, Prassas Consulting (<i>subcontractor</i>)
Policy Advisor	Jake Bowling, MSW Managing Principal, Bowling Business Strategies
Content Development Specialists	Rachael Matulis, MPH Principal, Bowling Business Strategies Erica Damler Sahn, MPH President, Glacier Healthcare Consulting (<i>subcontractor</i>)

MELISSA BAILEY, M.A. LPC

<https://www.linkedin.com/in/melissa-bailey-95388135/>

SUMMARY OF QUALIFICATIONS:

- Strong leader who moves strategic plans into action to achieve the goals of the organization
- Assesses, facilitates and leads system of care transformation activities
- Provides leadership guidance and coaching
- Builds consensus, collaboration, and partnerships
- Successful use of data to highlight value and outcomes
- Budget development and management

PROFESSIONAL LICENSES

- PA Licensed Professional Counselor: Feb. 2018 - Current
- VT Licensed Clinical Mental Health Counselor: Dec. 2000 – January 2019

PROFESSIONAL EXPERIENCE

BOWLING BUSINESS STRATEGIES

Feb. 2021- Present

Principal

- Provides subject matter expertise and technical assistance to states, counties, providers, and other organizations, focusing on improving system design for mental health and substance use disorders
- Provides strategic guidance and support for organizational change and leadership activities
- Programmatic and workflow redesign and implementation
- Policy analysis, writing, translation, and implementation
- Develop proposals and scopes of work, and develop, and implement work plans
- Project management activities to ensure successful implementation

CENTER for HEALTH CARE STRATEGIES

Director of Behavioral Health and Child Health Transformation

Nov. 2018 – Feb 2021

- Played a key lead role for several national health initiatives, focused on pediatric health care transformation, behavioral health (adults and children), criminal justice, complex health in adults, substance use disorder care models, trauma, system of care redesign, child welfare and early childhood
- Provided subject matter expertise on several national initiatives focused on integrating service for people with complex health and social needs
- Provided technical and subject matter expertise to support CHCS' Medicaid leadership initiatives
- Developed project proposals and budgets for new projects
- Supervised team members on projects

STATE of VERMONT, AGENCY of HUMAN SERVICES, DEPARTMENT of MENTAL HEALTH

Commissioner (Governor Appointed)

Jan. 2017 - Oct. 2018

Deputy Commissioner (Governor Appointed)

Oct. 2015 – Dec. 2016

The State Mental Health Authority with statutory responsibility for the mental health of all Vermonters.

Overseeing ten Designated Mental Health Agencies, two Specialized Services Agencies, secure residential, adult and youth crisis beds and the Vermont Psychiatric Care Hospital.

- Provided overall leadership to the department and mental health system in Vermont
- Developed and manages a \$220M budget
- Managed 250+ employees including executive leadership and union positions
- Worked with Governor's office and legislators in the continued improvements to the mental health system
- Participated in quality improvement activities for the system of care including application of Results Based Accountability
- Leadership within the system of care to improve child and family services especially in relation to Adverse Childhood Experiences, Adverse Family Experiences, generational poverty, developmental trauma and toxic stress

- Developed opportunities and program changes to address social determinants of health and build resiliency
- Participated in the development and implementation of wellness activities for adults with a serious and persistent mental health diagnosis
- Partnered with department's epidemiologist to use data to drive programmatic changes and improvements and to gauge population based health trend
- Department lead for Medicaid policy changes and implementation, establishing rates and correct coding expectations
- Represented mental health in the development and alignment of Medicaid mental health services with the state's All Payer Waiver to further healthcare reform
- Prepared and presented testimony to the State Legislature
- Department's point for all media requests
- Provided clinical technical assistance to Designated and Specialized Agencies
- Reviewed and participated in administrative hearings for grievances and appeals
- Participated in a variety of system's workgroups and committees to oversee, manage, evaluate and improve the mental health system of care including with the Agency of Education and other departments within AHS

VERMONT CARE PARTNERS

Quality Director

Nov. 2014 – Oct. 2015

Provider network development and management of the 16 mental health and developmental disability agencies designated by the State of Vermont and in partnership with provider association.

- Developed with the provider network, an integrated, high-quality system of comprehensive services and supports that focuses on the continuum from health promotion and prevention through treatment
- Supported and consulted in creating a centralized data repository to track system-wide outcomes
- Created quality assurance toolkits to collect and maintain accurate and high-quality data
- Developed system-wide outcome measures using Results Based Accountability
- Led marketing and promotional activities to describe and promote the work of our members and demonstrate their value via social media, print media and other outlets
- Participated in health care reform activities to ensure the inclusion of mental health, developmental disabilities and substance use services and treatment
- Participated in the drafting of a successful grant application for the Certified Community Behavioral Health Centers (VT declined the grant)

UNIVERSITY OF VERMONT

Vermont Child Health Improvement Program

Feb. 2015 – Oct. 2015

- Represented VCHIP at statewide meetings for child and family health
- Oversaw three VCHIP projects: School Climate, Fetal Alcohol Syndrome and Newborn Consultation Regarding Developmental Needs
- Participated in the VCHIP Senior Leadership Team
- Liaison and manager of the contract between the University of Vermont and the State Department of Medicaid for the Medicaid Chief Medical Officer and Medical Director

OTTER CREEK ASSOCIATES and MATRIX HEALTH SYSTEM

Director of Operations and Clinical Services

June 2014 - Nov. 2014

- Oversaw Vermont's largest group practice of approximately 80 clinicians
- Recruited, interviewed and hired new clinicians
- Negotiated insurance rates
- Supported clinicians to resolve issues related to their practice
- Primary contact for Vermont's Accountable Care Organization
- Functioned as the HIPAA Compliance Officer
- Maintained and updated all social media outlets and managed HTML updates to website

STATE OF VERMONT – AGENCY of HUMAN SERVICES

Director of Integrated Family Services - Secretary's Office

Sept. 2010 - May 2014

- Led and directed a statewide system change process with the goal to integrate all child and family services provided by the Agency of Human Services
- Provided the vision, strategic plan and work plan for a comprehensive integrated approach
- Efficiently managed fiscal resources and identified and developed strategies to address budget issues
- Developed and implemented new fiscal and payment models
- Integrated all external grants and funding in two pilot regions and for one statewide provider
- Analyzed data to identified trends and developed plans to assure goals were met
- Established the process to ensure representation from the public and stakeholders and ensure their input was fairly and meaningfully represented in all systems change efforts
- Provided guidance to Governor's Cabinet related to changes needed to laws and policies to meet the goals
- Developed and implemented an effective communication strategy for a diverse group of providers, advocates and family representatives
- Identified and recommended solutions to workforce development challenge

Department of Mental Health

Operations Chief

Oct. 2005 - Sept. 2010

- Administered the contracted services for the children's intensive community-based and residential system
- Provided supervision to master level clinical care coordinators
- Acted as liaison on collaborative projects with the University of Vermont and Primary Care Providers.
- Participated in quality assurance reviews
- Developed and implemented policies and procedures
- Provided training and technical assistance to the human service system
- Responded to complaints, inquiries, and suggestions from families, consumers and the general public
- Interpreted policy and made decisions on difficult, controversial, or unusual case situations

Programs Coordinator

Nov. 2004 - Oct. 2005

- Assisted in the development and implementation of community-based programs
- Identified and solved program issues to enhancing services

Clinical Care Coordinator

Mar. 2002 - Nov. 2004

- Conducted utilization review, clinical care oversight and consultation in the development of treatment plans
- Participated in statewide management of the most intensive behavioral health care available for children
- Approved use of the Medicaid Waiver, Medicaid funding, and interdepartmental service agreements
- Hired and managed professional consultant contracts
- Worked with the quality improvement team to ensure standards of clinical care were met

Children's Acute Care Manager

Apr. 2001 - Mar. 2002

- Assisted in the development of the acute care system for children and adolescents
- Clinically reviewed clients admitted to acute mental health inpatient settings
- Ensured appropriate discharge and treatment plans were developed and implemented
- Provided and arranged for clinical case consultation for community and inpatient teams
- Updated treatment guidelines, admissions and continued stay criteria

FIELDSTONE COUNSELING

Therapist/Business Partner

Jan. 2003 - June 2004

- Established a small business as a private mental health practice
- Provided individual and family therapy

COMMUNITY COLLEGE OF VERMONT

Instructor

Aug. 2002 - May 2004

- Introduction to Exceptional Populations
- Para-educator in the Classroom
- Children with Challenging Behaviors

HOWARD CENTER

Family-School Coordinator

Mar. 1998 - Apr. 2001

- Developed and implemented therapeutic strategies for children and their families
- Promoted better family and school relationships
- Consulted with school staff
- Provided case management to connect families with community programs and agency services
- Provided parent education through home visits

STONE ALLIANCE FARM, INC. - Hyde Park, Vermont

Partner/Therapist/Business Manager

Aug. 1996 – Mar. 1998

- Secured 501(c)(3) status
- Provided traditional and innovative therapy services
- Created and implemented new programs, developed policies and procedures, conducted daily operations of running a non-profit organization as well as community outreach
- Conducted fund-raising and grant writing to support existing and new programs

EDUCATION and COURSES

- **Johnson State College** - Johnson, VT Master of Arts Counseling - May 1997
- **Philadelphia University** - Philadelphia, PA - Bachelor of Science Merchandising - May 1990
- **Dartmouth Tuck School of Business** – Leadership training, VT Agency of Administration – 2013
- **Harvard Kennedy School Executive Education** – Cambridge, MA, Certificate in *Leadership for the 21st Century* - Sept. 2012
- **VT Agency of Human Services Leadership Development** – 2009-2010

Additional Roles:

- Co-host of State of Mind Podcast
- Co-Chair Governor's Committee on Community Violence Prevention Task Force- Established by Executive Order May 2018 -Oct 2018
- Member of the senior leadership team to align mental health, development disabilities and substance abuse services with CMS and Vermont's All Payer Waiver 2015-2017
- Participating on the State Innovation Model steering committee, the Payment Reform workgroup and the Care Models and Care Management work group 2013-2016
- ACO population health committee - 2016
- Appointed to Governor's Blue Ribbon Commission on Childcare - 2015
- Chair of the State Interagency Team - 2005-2014
- Center for Health Care Strategies – co-lead: Reducing Use of Psychiatric Medication - 2012-2014
- Children's Health Insurance Reauthorization Act Grant – grant committee participant - 2013
- Green Mountain Care workgroup on prevention activities for the health care benefits package - 2013
- Appointed to the Early Childhood Interagency Coordinating Council - 2003-2006
- Appointed by the Governor to the Advisory Council on Special Education - 2003-2005

Presentations:

- Michigan Behavioral Health Association Conference Key Note - Feb. 2020
- State University Partnership Learning Network fall meeting presentation on Behavioral Health Value Base Payment - Dec. 2019
- Pennsylvania's Behavioral Health Value Based Payment Conference - Aug. 2019
- National Council for Behavioral Health Annual Conference - Value Based Payment for Behavioral Health/Certified Community Behavioral Health Centers- March 2019
- Opening Comments at Vermont's Suicide Prevention Conference - June 2018
- Opening Comments at National Alliance on Mental Illness Vermont Chapter Annual Conference - May 2018
- Keynote at National Alliance on Mental Illness, Vermont Chapter - Nov. 2017
- Opening Comments at National Alliance on Mental Illness, Vermont Chapter–May 2017
- Opening Comments at the Legislative Day for Mental Health–Feb. 2017
- Resilience Movie Screening for Legislators - Panelist –Feb. 2017
- The Role of the Department of Mental Health in the Mental Health System of Care, Green Mountain Care Board - Nov. 2015
- Centers of Excellence–How to Shift Our System, Designated and Specialized Service Agencies- Feb. 2015
- Integrated Family Services- various presentations on change management, the goals and connection to health care reform, statewide - Sept. 2010-May 2014
- Integrated Family Services, Green Mountain Care Board - Nov. 2013
- Adverse Childhood Experiences Conference - Oct. 2013
- Vermont Adoption and Foster Parent Association Annual Conference – Apr. 2012
- Waiver Training by Department of Mental Health for Children on the Mental Health Waiver, statewide provider network - 2002- 2010
- What are Wraparound Services?, statewide provider network - 2002- 2010
- System of Care Trainings, statewide provider network - 2002- 2010
 - All 12 AHS Districts
 - Department of Vermont Health Access
 - BEST Conference
 - Various other conferences
- University of Vermont's Primary Care and Child Psychiatry Conference - May 2006, May 2007, Nov. 2009
- Poster Presentation, University of Southern Florida, Research and Training Center for Children's Mental Health, 21st Annual Research Conference - Feb. 2008
- Rollout of the Implementation of the Interagency Agreement, statewide provider network, Child Welfare, Family Organizations and Education - May 2006

Media Samples

Podcast Co-host

May 2021: [State of Mind | Podcast on Spotify](#)

Vermont Public Radio Interview

June 24, 2014: <http://digital.vpr.net/post/alarm-raised-disabled-kids#stream/0>

December 1, 2016: <http://digital.vpr.net/post/vermonters-mental-health-crisis-can-now-text-support#stream/0>

March 20, 2017: <http://digital.vpr.net/post/mental-health-week-psychiatric-crisis-hospital-ers#stream/0>

March 22, 2017: <http://digital.vpr.net/post/mental-health-week-how-are-our-kids-coping#stream/0>

Television

February 27, 2017: <http://www.wcax.com/story/34614479/special-report-emergency-rooms-in-crisis>

Comcast Newsmakers May 2018: <https://comcastnewsmakers.com/Videos/2018/5/7/Vermont--Mental-Health?autoplay>

Print

January 5, 2017: <http://www.vermontbiz.com/news/january/scott-appoints-tierney-dps-bailey-commissioner-mental-health>

March 2, 2017: <https://vtdigger.org/tag/melissa-bailey/>

Publications:

Brykman, K., Houston, R., **Bailey, M.**, (2021) "Value-Based Payment to Support Children's Health and Wellness: Shifting the Focus from Short-Term to Life Course Impact. *Center for Health Care Strategies*.

Bailey, M., Rabot, S., (2019) "Using Fiscal Mapping to Clarify the Landscape of Early Childhood Services: Initial State Lesson and Fiscal Mapping for Early Childhood Services: How-To Guide and Data Collection Tool"

Bailey, M., Matulis, R., Brykman, K., (2019) "Behavioral Health Provider Participation in Medicaid Value-Based Payment Models, An Environment Scan and Policy". *Center for Health Care Strategies*.

Kasehagen, L., Omland, L., **Bailey, M.**, Biss, C., Holmes, B., Kelso, P., (2017) "Relationship of Adverse Family Experiences to Resilience and School Engagement Among Vermont Youth". *Maternal Child Health J.*

National Expert Healthcare – High Performing Teams - Social Determinants of Health

Chief Executive of the largest public mental health system in the United States

- Responsible for \$6 billion annual expenditures
- Governance and operations responsibility for twenty-four (24) Joint Commission Accredited Hospitals
- Governance and operations responsibility for two nationally renowned research facilities NYSPI with Columbia University and Nathan Kline Institute with New York University
- Recognized for innovative public policy development
- Ensured the delivery of world-class behavioral health services

Key designer of State policy and care models for behavioral health care coordination and integrated care models

Recognized speaker known for exceptional skill in leveraging strategic vision, financial resources and program operations

Certified Dare to Lead™ Facilitator based upon the research of Brené Brown

Skilled consultant in talent development, strategic operations and tactical implementation across teams.

Interim Chief Executive Officer for one of the largest health and human services nonprofits in financial crisis

- Maintained delivery of high-quality care with no untoward client incidents
- Safely transitioned all services to other providers within six (6) months
- Transitioned many Union and management staff to new providers
- Developed financial and operations analysis with outside experts leading to a bankruptcy filing
- Successfully advanced bankruptcy proceeding with Federal Court, US Trustee and Creditor's Committee
- Effectively communicated with the staff, Board, external stakeholders, government and the New York media

Executive in county government recognized as an innovator in mental health, developmental disabilities and substance abuse services

Adept at developing and sustaining high-performance teams within agencies and with external partners

Career Path

Chief Executive Officer

July 2015 - Present

Woodlock & Associates LLC

Woodlock & Associates provides strategic and actionable consultation in the health and human services sector. Woodlock & Associates has a diverse client base represented in State Governments, large Hospital systems, non-profit behavioral health providers, child welfare, City and State-level associations, Medicaid Managed Care Plans among others. Distinctive consultation is offered in developing behavioral health-social determinants of health-child welfare value based payment models, rapid process improvement for avoidable emergency and inpatient admissions, organizational strength assessment, behavioral health-social determinants-child welfare program development, design and implementation of innovative and accountable care delivery and leadership coaching. Certified Facilitator of Dare to Lead™

Chief Executive Officer

December 2014 - June 2015

FEGS Health and Human Services

FEGS Health and Human Services was one of the largest non-profit organizations in the United States with a reputation for delivering high quality employment, health and social services. Interim CEO, selected by the Board of Directors, to lead the Agency during a severe financial crisis and bankruptcy filing. Crisis leadership included personal communication with employees and stakeholders, directing an in-depth financial and programmatic analysis, developing analytic models and negotiating complex program transitions. Built and sustained a strong internal leadership team to ensure the continued delivery of quality services and treatment to highly vulnerable clients.

Within a six-month period, 125,000 clients were safely and compassionately transitioned to other agencies. Successful in partnering with expert consultants, New York City and New York State Government, UJA Federation, Unions, Federal Bankruptcy Court, a Creditors Committee and a large Board of Directors. Communicated extensively with stakeholders and led media strategy.

Chief Operating Officer

September 2013 - June 2015

FEGS Health and Human Services

Operations executive for a non-profit with an annual budget of over \$250 million offering extensive workforce development, employment, behavioral health, developmental disability, youth, home care and Jewish family services. FEGS delivered high quality service at over 350 locations throughout New York City and Long Island. Brought new vision and action to developing external partnerships as evidenced by the award of a nearly \$1 million grant from the Robin Hood Foundation for integrated care and various partnerships with Managed Care Organizations and Hospital Systems.

Acting Commissioner

October 2012 – July 2013

New York State Office of Mental Health

Appointed by Governor Cuomo to be the Commissioner of the New York State Office of Mental Health. The Commissioner establishes the vision, values and mission for one of the largest public mental health systems in the nation with annual expenditures of \$6 billion. Responsible for the operation of twenty-four (24) hospitals with Joint Commission Accreditation and two premier Research Facilities, the Psychiatric Institute with Columbia University and the Nathan Kline Institute with NYU. As the public face of the Agency, the Commissioner is accountable to the Governor, Legislature, consumers, families, providers and stakeholders.

While acting as the Commissioner, OMH faced a series of unprecedented events including Hurricane Sandy, the Newtown School shootings and several high-profile subway incidents in New York City. While the individual responses were varied, all required strong, steady leadership with thoughtful action and value-based communication. I designed and stewarded approval for a comprehensive transformation of state operated services. Securing support from advocates, providers, unions and legislators with impacts within their districts. The Regional Centers of Excellence platform offered a new business model for state operations, as a smaller, highly specialized network partner with a shift in resources to community nonprofits. The multi-year plan included the closure of nine (9) hospitals in three years.

Regularly presented to the Governor's Office, Legislature and Trade Organizations across the State and nationally. During this time, I simultaneously held the position of Executive Deputy Commissioner.

Executive Deputy Commissioner

October 2011 – July 2013

New York State Office of Mental Health

As the Executive Deputy Commissioner performed central executive management functions to ensure the efficient operation of the New York State mental health system. This included appropriate oversight, regulation, integration, financing and coordination of mental health services for New York State. Directly supervised all policy, program, financial and support divisions.

Led an initiative to track and improve outcomes for the 700,000 individuals receiving services from the public mental health system annually. Co-Chair of the State's design team for Medicaid Care Coordination for special needs children and their families.

Deputy Commissioner and Director
Division of Children and Family Services
New York State Office of Mental Health

October 2008- October 2011

Lead executive for establishing public policy, financing and operation of the New York State public mental health system for children and their families. Implemented the nationally recognized "Children's Plan." Negotiated a complex fiscal and regulatory environment to uphold public accountability for effective outcomes in approximately \$200 million dollars in State General Fund Expenditures targeted for community based mental health services for children. Responsible for six (6) state-operated free-standing Children's Psychiatric Centers and Children's services located at eight (8) Adult psychiatric Centers. Interfaced regularly with academic, research and fiscal oversight entities to bring quality, cost-effective evidence based treatment practices to the care of children in every county and borough in the State.

Deputy Director
Division of Children and Family Services
New York State Office of Mental Health

September 2005 - October 2008

Lead operations agent for Children and Families at OMH. Designed and implemented a multifaceted, \$62 million initiative within a one-year period. Responsibilities included: oversight of state aid and Medicaid targeted to community based mental health services, development of public policies and fiscal models, leadership and constituency building with multiple external partners, collaboration with families, youth and advocacy organizations and supervision of Division staff and operations.

Deputy Commissioner
Onondaga County Department of Mental Health

1998 - 2005

Served as the Chief Operating Officer for a large public mental health system in Upstate New York. Responsible for the oversight and management of \$23 million in State funds targeted to community based mental health services. Executive accountable for county-operated programs including a behavioral health program for over 900 inmates, a case management program and multiple children's mental health treatment programs. Regularly presented to the County Legislature and County Executive on programmatic and fiscal issues. During this time, I spearheaded a reallocation process for all children's mental health funding, designed new program models, established the first county-based process for admission for Residential Treatment Facilities and established extensive partnerships with social services, juvenile justice agents and schools.

Program Manager
Onondaga County Department of Mental Health

1993-1998

Responsible for community based planning, programmatic oversight and quality management for mental health services for adults and children.

Community Systems Specialist 1989-1993
CNY Regional Office, New York State Office of Mental Health

Selected for a highly competitive OMH executive development program.

Registered Nurse 1988-1989
Emergency After-Hours Program, Prepaid Health Plan

Licensed Practical Nurse 1986-1988
Emergency Room, Critical Care Unit and Intensive Care Unit

Education

1989	Syracuse University The Maxwell School	Masters in Public Administration (MPA)
1988	Syracuse University College of Nursing	Bachelors of Science in Nursing (BSN)
1987	Duke University	Professional Nursing Assistant Internship

Publications

Woodlock, Kristin M.; "Improving Community-based Mental Health Care for Children: Building on a Consolidated Empirical Foundation" Administration and Policy in Mental Health and Mental Health Services Research, December 2012

Under Review:

Molly FinnertyMD, Emily Leckman-Westin PhD, Qingxian Chen MS, Nitin Gupta MS, Kimberly Hoagwood PhD, Edith Kealey MSW, Matthew Perkins MD, MBA, MPH, Bradley Stein MD, Jennifer Wisdom PhD, Kristin Woodlock RN, MPA, Mark Olfson MD, MPH; "Variation in Predictors for Three Measures of Psychotropic Polypharmacy in Publically Insured Youth"

Jennifer Wisdom PhD, Emily Leckman-Westin PhD, Ka Ho Brian Chor PhD, Sa Shen, PhD, Qingxian Chen MS, Kimberly Hoagwood PhD, Edith Kealey MSW, Bradley Stein MD, KristinWoodlock RN, MPA, Mark Olfson MD, MPH, Molly FinnertyMD. "Psychotropic Polypharmacy among Children over time Based on Participation in a Quality Improvement Initiative."

ANN RITTER, JD, MPH

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PROFESSIONAL EXPERIENCE

Bowling Business Strategies (BBS) | Philadelphia, PA

Principal (November 2021 – present)

- In my current role, I support and advise behavioral health, public health, social service organizations and state government on program planning, management, design, and implementation. I conduct strategic planning processes, landscape assessments, environmental scans, and qualitative research to inform and advise strategy.
- Recent clients include: Delaware Department of Health and Social Services; Ohio Children's Alliance; Young People in Recovery; Hopeworx, Inc.; and the Behavioral Health Policy Collaborative.

The Burke Foundation | Princeton, NJ

Program Officer (November 2020 – October 2021)

Maternal Child Health Consultant (April 2020 - October 2020)

- Managed a \$1 million portfolio of grants and projects, including a public-private partnership with state government focused on adverse childhood experiences (ACEs).
- Provided strategic advice, support and technical assistance to grantees to ensure the success and sustainability of funded programs.
- Conducted due diligence on funding proposals, including assessment of grantseekers' organizational capacity and needs.
- Researched and wrote original articles and conduct field scans to inform strategy.
- Led the development of the statewide Actions4ACEs public awareness campaign. Co-chaired campaign's community advisory board. Continue to manage network of government, education and law enforcement partners to support implementation.
- Worked closely with a grantee to develop, launch and secure over \$977,000 in co-funding for a statewide training and coaching pilot program for public school teachers and staff in New Jersey focused on trauma-informed care and mental health.

The New Jewish Home | New York, NY

Senior Director, Institutional Relations & Program Development (July 2019 - March 2020)

- Managed a portfolio of over 100 foundation, corporate, and government funders and prospects. Led all institutional donor relations activities for the health system, including the coordination of site visits and grant reporting.
- Secured six-figure seed funding investments for new projects and strategic initiatives.
- Served as government relations officer and registered lobbyist for the health system.
- Worked across departments with fiscal, legal and program staff to streamline workflow and systems for better fundraising outcomes and efficiency.

PROFESSIONAL EXPERIENCE (continued)

LARK Consulting | New York, NY

Principal (July 2014 - October 2020)

- Specialized in new program development, communications, grantwriting and strategic management support for public health and social service agencies.
- Co-designed programs and wrote grants securing over \$18 million in government, corporate and foundation funding.

Susan G. Komen Philadelphia | Philadelphia, PA

Program Director, Grants & Public Policy (November 2010 - August 2013)

- Oversaw \$2 million annual community grants program supporting programs in three states. Recruited, convened and managed community grant review committee.
- Led grantwriting activities, with a focus on corporate giving.
- Coordinated community partner engagement for large-scale fundraising events and managed a cause-related marketing program for regional businesses.
- Directed state-level policy activities, including participation in a coalition with multiple pharmaceutical industry and patient advocacy organizations.
- Served on Komen's national public policy advisory board.

National Nurse-Led Care Consortium | Philadelphia, PA

Director, Health Center Development & Policy (September 2008 - November 2010)

Policy & Program Strategist (September 2007 - August 2008)

Law & Policy Associate (September 2006 - August 2007)

- Co-designed program, wrote initial grant application, and served as the first project manager for a federal National Cooperative Agreement providing training and technical assistance to community health centers serving residents of public housing.
- Researched, drafted and presented original regulatory comments, model legislation, white papers and testimony.
- Researched and presented legislative and regulatory updates for health center leaders.

EDUCATION

George Washington University Milken Institute School of Public Health, MPH (2019)

Temple University Beasley School of Law, JD (2006)

Yale University, BA (2001)

RECENT PRESENTATIONS

- “Engaging the Community to Build Back Stronger: Lessons from the Actions4ACEs Campaign,” **National Conference on Health Communication, Marketing and Media** (panelist, August 2021)
- “Actions4ACEs: A New Statewide Public Awareness Campaign,” **New Jersey Governor’s Council on Alcohol and Drug Addiction** (presentation, July 2021)

Grace Charles, PhD

Beverly, MA / 781.635.4359 / gcharles@greenriver.org / [linkedin.com/in/gracekcharles](https://www.linkedin.com/in/gracekcharles)

PROFILE

I am a research scientist who integrates machine learning, behavioral science, and data science to generate insights that improve human well-being. I work with interdisciplinary teams to plan and execute surveys and analyses, develop data collection and advanced analytical methods, report results to stakeholders, and design interventions.

SKILLS

Software & Programming: R, Python, R Shiny, Tableau, QGIS, ArcGIS, Git

Selected Research Techniques: Experimental design, survey design, causal inference (Bayesian network analysis, potential outcomes framework), behavioral segmentation, message testing, survey weighting, predictive modeling (multivariate regression, hierarchical mixed models), sentiment analysis, power analysis, GIS, data visualization

EDUCATION

PhD in Ecology | University of California, Davis | Davis, CA | 2018

BA in Organismic and Evolutionary Biology | Harvard University | Cambridge, MA | 2011

EXPERIENCE

Data Scientist | Green River Data Analysis | Brattleboro, VT | November 2021 - Present

- + Identify new data sources and perform upfront analysis to assess their applicability to projects.
- + Work with external organizations to gain access to data sources when not publicly available.
- + Generate key public health indicators from the project warehouse based on mathematical algorithms, including aggregation, extrapolation, de-identification and predictive modeling.
- + Assist software development team with integration of algorithms and warehouse data into applications.
- + Facilitate the understanding of data and methodologies with team members and stakeholders.

Senior Research Scientist | Surgo Ventures | Washington, DC | February 2021 - October 2021

- + **Lead analyst** of Surgo's vaccine confidence portfolio. Advised and managed team of research scientists and analysts. Planned, executed, and analyzed nationally-representative surveys of American healthcare workers and the general public. Presented results to stakeholders such as the CDC, local and state public health officials, and Facebook
 - o Results reported in outlets including the [New York Times](#), [Axios](#), and [Salon](#)
- + **Lead analyst** of time-sensitive COVID-19 social distancing survey. Went from data collection to online publication in two months (March-May 2020)
- + Analyzed Twitter data to quantify nurse sentiment and concerns using **natural language processing tools**. Built analysis into an interactive **Tableau dashboard**
- + **Managed and mentored** research scientists, analysts, and interns and supported employee onboarding and training
- + Served as a **faculty advisor** for MIT HST.936: Global Health Informatics to Improve Quality of Care

Research Scientist | Surgo Ventures (formerly Surgo Foundation) | Washington, DC | February 2019 - February 2021

- + **Lead analyst** of family planning program in Madhya Pradesh, India. Developed survey instruments, conducted field tests, built processing pipelines to monitor data quality, and analyzed results using machine learning techniques
- + **Designed and ran predictive and machine learning models** (regression, segmentation, and causal Bayesian network analysis) to uncover drivers of complex health decisions
- + Collaborated with academic colleagues to develop **new Bayesian network causal machine learning tools** relevant and accessible to public health practitioners
- + Generated insights and **presented results to diverse audiences**, including the Government of India, the Clinton Health Access Initiative, and colleagues at the Conference on Neural Information Processing Systems (NeurIPS)

Doctoral Research | University of California, Davis| Davis, CA | 2012 - 2018

- + Designed and conducted five seasons of **independent field research** in Kenya
- + **Wrote and managed grant applications**, collected ecological data, analyzed data using statistical analysis tools, and produced research products including data visualizations and interactive maps
- + **Led and supervised research team** of four research technicians in collection of ecological data
- + **Collaborated with federal scientists** from organizations including the Smithsonian and USDA ARS
- + Created an online, **open-source data repository** to share long-term research data
- + **Published research** in 8 peer-reviewed journal articles and 1 book chapter

Project Manager | Princeton University | Mpala Research Centre, Nanyuki, Kenya | 2011 - 2012

- + **Managed** data collection, database management, experimental design, scheduling, and vehicle and equipment maintenance for a multi-institutional research project
- + Supervised five full-time research technicians
- + **Lead scientific outreach efforts**, including arranging and planning educational science field days with local high school students
- + Conducted **independent research** resulting in two publications

Selected Publications

- + **G.K. Charles**, M. Jain, Y. Caplan, H. Kemp, A. Keisler, V.S. Huang, and S.K. Sgaier (2020). *Increasing Uptake of Social Distancing during COVID-19: Machine Learning Strategies for Targeted Interventions*. Available at SSRN: <http://dx.doi.org/10.2139/ssrn.3602166>
- + B. Butcher, V.S. Huang, C. Robinson, J. Reffin, S.K. Sgaier, **G.K. Charles**, and N. Quadrianto (2021). *Causal Datasheet for Datasets: An Evaluation Guide for Real-World Data Analysis and Data Collection Design Using Bayesian Networks*. Frontiers in Artificial Intelligence. <https://doi.org/10.3389/frai.2021.612551>
- + S. K. Sgaier, V.S. Huang, and **G.K. Charles** (2020). *The Case for Causal AI*. Stanford Social Innovation Review, . https://ssir.org/articles/entry/the_case_for_causal_ai
- + Full publication list on [Google Scholar](#)

Selected Technical Reports and Other Publications

- + [The Challenge of Our Time: Achieving High Vaccination Coverage during the COVID-19 Pandemic](#) (*lead analyst*) Surgo Ventures. February 2021.
- + [U.S. Healthcare Workers: COVID-19 Vaccine Uptake and Attitudes](#) (*lead analyst*) Surgo Ventures. February 2021.
- + [In Their Own Words: How Nurses' Tweets Capture COVID's Psychological Toll](#) (*lead analyst*) Medium. May 1, 2020.
- + [The Coronavirus' Hidden Death Toll in America's Counties](#) (*lead analyst*) Medium. May 20, 2020

Kerry D. King, Psy.D., M.B.A.

Telephone: 610-202-1938; Email: kerry@bowlingbizpa.com

Executive Summary

Behavioral Healthcare Executive & Licensed Clinical Psychologist; Extensive experience in clinical leadership, change management, systems consultation, best practice implementation and professional development training across a range of disciplines; Outstanding interpersonal, motivational and strategic planning skills

Core Competencies

Strategic clinical leadership; Organizational consultation; Project leadership; Evidence-based behavioral health treatment; Professional development

Professional Experience

Employment **Principal – Bowling Business Strategies (Philadelphia, PA)** 1/2022 - present

- Provide subject matter expertise on engendering clinical improvement within behavioral health systems of care
- Function as strategic leader on clinical workstreams
- Provide technical assistance to state, county and provider leadership on design, enhancement, measurement and optimization of care across the spectrum of mental health, substance use and co-occurring services
- Support thought leadership within BBS through research, scholarship and collaboration with other professionals
- Support the adoption of evidence-based practices through the development of implementation tools, system/workflow design and development of policies and procedures

Vice President of Clinical Services – Recovery Centers of America 2020-12/2021

- Guide clinical strategy for a national behavioral health treatment provider, across 10 hospitals and 13 community-based clinics across the United States
- Supervise VP and Director-level team members with responsibilities for program development, clinical operations & training, family programming, and clinical quality
- Oversee clinical product development, execution and effectiveness for all addiction and co-occurring treatment programs across RCA enterprise (residential, outpatient, MAT and digital)
- Utilize key performance indicators to guide system-wide and site-specific improvement in clinical product offerings and delivery of care
- Serve as an enterprise-wide subject matter expert for executive & site-based teams

Founder & Principal – The Learning Place (Barbados; Philadelphia, PA) 2006 - present

- International consultation to governments, global civil service organization and private and public sector entities on psychological factors impacting policy decisions
- Consultation to managed care entities on policy and product enhancements required to better meet the needs of individuals with co-occurring disorders
- Development, implementation and supervision of behavioral health support services in schools
- Psychological assessment to identify learning and emotional challenges
- Professional development across a range behavioral health and educational settings

Chief Clinical Officer – KeyStone Center (Southeastern PA) 2019 – 2020

- Designed and executed clinical innovation for residential and ambulatory levels of care, such as to maximize market share while creating an environment and culture that exemplifies the organization's mission, vision and values
- Guided implementation of evidence-driven clinical strategy, leading to improvements in clinical effectiveness and patient safety across the care continuum
- Operationalized process flow between Clinical, Nursing, Medical, Admissions and Outpatient departments

- Maintained oversight of & adherence to clinical and regulatory quality metrics in all areas of care
- Recruited and supervised clinical leadership in the service of advancing organizational effectiveness and achievement of targeted objectives

Director of Outpatient Services – KeyStone Center (Southeastern PA) 2016 – 2020

- Managed daily operations of two ambulatory substance use agencies, treating youth and adults
- Maintained oversight of clinical and regulatory compliance processes
- Ensured quality and continuous enhancement of evidence-based service offerings
- Maintained budget and financial operations such as to achieve financial objectives, including the reduction of bad debt, implementing controls to maximize resource efficiency and revenue

Clinical Consultant – Magellan Health (Newtown, PA) 2016 – 2020

- Provided subject matter expertise and project management on clinical initiatives, targeting enhancement of co-occurring disorder (COD) services, offered by contracted treatment facilities
- Provided guidance on initiation and monitoring of evidence-based clinical programs
- Clinical project management across various treatment facilities
- Consulted on provider enhancement to behavioral health administrators across five contracted counties
- Developed best practice guides for implementation of MAT and COD treatment

Clinical Care Advisor – Magellan Health (Newtown & Bethlehem, PA) 2014 – 2016

- Served as an internal subject matter expert on COD
- Managed the development, implementation, and monitoring of the Magellan’s COD treatment delivery model
- Liaised with behavioral health administrators, in five contracted counties, to execute collaborative projects related to advancement of best practices in substance abuse/COD treatment
- Provided clinical guidance to care management team on appropriate care decisions for plan members
- Ensured that clinical services, by contracted substance abuse/COD treatment facilities, were delivered effectively, efficiently, and consistent with quality expectations.

Director of Psychological Services - KeyStone Center (Chester, PA) 2010 – 2014

- Developed clinical treatment tracks, including Dialectical Behavioral Therapy
- Delivered training workshops for clinical staff, as well as external and community partners, such as healthcare providers, 3rd party payors and diversionary treatment court programs
- Provided consultation regarding diagnosis and treatment approaches
- Conducted individual and group intervention for population with COD
- Supervised psychology doctoral interns and externs

Consultant Psychologist – Ministry of Education (Barbados) 2006 - 2012

- Policy and technical consultation on school-wide behavior management, special education and student leadership development
- Diagnostic assessment to detect exceptionalities in school-aged population
- Direct crisis intervention and consultation to schools on crisis prevention

Regional Consultant – UNICEF (Office for Barbados & the Eastern Caribbean) 2006 – 2011

- Research to establish baseline use of behavioral management practices and attitudes toward the same in a multi-national study
- Facilitated design of national and school-specific behavior management protocols
- Consultation to Ministries of Education on policy implications of behavior management
- Design and delivery of related teacher training
- Monitoring of four-nation implementation and supervision of local coordinators

- Program Director - KeyStone Center Residential Treatment Facility (Chester, PA)** 2005-2006
- Supervision and leadership of all clinicians and therapeutic staff
 - Clinical program development for treatment of dually diagnosed adolescents
 - Provided guidance in crisis prevention and direct crisis intervention
 - Consultation to county Juvenile Probation Departments and Children & Youth Services regarding access to care and clinical needs of wards
 - Employee recruitment, placement, promotion and performance appraisal
 - Design and implementation of employee training modules
 - Supervision of doctoral interns on clinical intervention and assessment
- Consultant - First Philadelphia Charter School for Literacy (Philadelphia, PA)** 2004-2006
- Independent consultation to the administration on identification and provision of services for students with learning disabilities
 - Evaluations for the assessment of learning strengths, needs and diagnosis of learning disabilities
- Adjunct Professor – Widener University Institute for Graduate Clinical Psychology (Chester, PA)** 2004-2005
- Instructor: Intellectual Functioning and Assessment
- Clinical Coordinator – KeyStone Center Residential Treatment Facility (Chester, PA)** 2004-2005
- Group Counselor for Adult Sex-Offenders – Carelink (Wilmington, DE)** 2004-2005
- Diversity Consultant – Chester 21st Century Skills & Assessment Center (Chester, PA)** 2003-2004
- Provided Emotional Competence assessment and mentoring/coaching
 - Consulted on project diversity needs and program evaluation
- Senior Consultant - Curtis Analytic Partners (Philadelphia, PA)** 2002-2003
- Managed a variety of pharmaceutical market research studies
 - Developed research instruments targeting consumer preferences in branding

Education & Professional Certification

Licensed Psychologist – Pennsylvania & Florida; Registered Clinical Psychologist – Barbados

Education

Widener University, Chester, PA

Doctor of Clinical Psychology (Psy.D.)

June 2004

Masters in Business Administration (Health & Medical Services Administration)

June 2004

Mount Vernon Nazarene University, Mount Vernon, OH

Bachelor of Arts (Summa Cum Laude; Salutatorian):

- Psychology; Elementary Education; Specific Learning Disability Education

May 1999

Professional Affiliations

American Psychological Association (APA) - Member

APA Society of Addiction Psychology - Member

Barbados Association of Psychologists - Member

Scholarly Research

King, K. D. (2004). *Emotional Intelligence: A Neglected Paradigm in Diversity Management*. Doctoral Dissertation



PHILIP PRASSAS, ED.D., MBA, MAS

Advancing operations through a continuous improvement mindset

PERSONAL STATEMENT

Innovative servant leader with over 15 years of experience cultivating strong relationships globally and developing highly effective teams reach their maximum potential. Proven track record of delivering novel solutions for complex problems across government relations, higher education, client relations, operations, and healthcare.

EDUCATION

Doctor of Education, Educational Leadership
Rider University, Lawrenceville, NJ
2017 -2020

**Master's of Business Administration,
Accounting**
La Salle University, Philadelphia, PA
2012-2013

**Master's of Administrative Science, Global
Leadership**
Fairleigh Dickenson University, Teaneck, NJ
2006-2007

**Bachelor's of Science, Finance, Computer
Information Science**
Manhattan College, Bronx, NY
1999-2003

AFFILIATED ORGANIZATIONS

Director, Board of Directors
Credit Union of New Jersey | 2019 - present

Alumni Board Member, Class Fund Director
The Pennington School | 2010 - present

CERTIFICATIONS

Six Sigma Green Belt | 2015
Professional Scrum Master (PSM I) | 2020

phil@prassasllc.com | www.prassasllc.com
www.linkedin.com/in/philip-prassas

PROFESSIONAL EXPERIENCE

Founder and Managing Principal

Prassas Consulting LLC | 2020 - present

- Counsel organizations with reaching their maximum potential by modernizing their business operations and transitioning to data-driven strategic decision-making.
- Advise organizations in financial administration, business operations, client management, and team building.
- Maintain strong relationships with clientele by ensuring deliverables continually exceed client expectations.

Senior Director, Advanced Placement (AP) Scoring & Reporting Operations

ETS | 2018 - 2021

- Accountable for an \$80M annual budget and for leading a team of 20+ FTEs to ensure that 20k+ AP Readers enjoy a world-class remote and onsite scoring experience while grading 5M exams within a three-week deadline.
- Modernized the entire user experience by redesigning the E2E management of operations: restructured the team to match talent with operational needs, established dashboards, project plans, and KPIs to effectively govern performance levels, migrated legacy IT applications to modern applications.
- Designed and implemented a state of the art digital score capture application that replaced manual handwritten score capture reduced process risk and improved score capture quality.
- Provided oversight on mass communication operations: large scale email campaigns, call center operations, SMS messaging, dynamic website maintenance.

Adjunct Professor

The College of New Jersey | 2014 - present
Rider University. 2013-2015

- Instruct 50+ undergraduate and graduate students each semester in various subjects: Introduction to Cultural Anthropology, Introduction to Health Care, Disparities in U.S. Healthcare, and Public Health and Social Policy.

Senior Director of Operations

ETS | 2014 - 2018

- Led a team of 15+ professionals who were responsible for managing the inventory of 4,000 test centers across 180 countries so that 2M+ TOEFL, GRE, and Praxis test takers could take an exam on their preferred date and location.
- Redesigned the team structure and re-engineered systems and applications to improve efficiencies and reduce expenses.
- Developed process improvements that have realized an ongoing reduction of expenses greater than \$1.5M/annually.

Administrative Analyst

New Jersey Department of Human Services | 2003 - 2014

- Led the financial administration and grant management operations for the \$226M Superstorm Sandy Federal program for the Department. Required the project management of 50+ subprograms across three State Departments and the Governor's Office. Aided in setting policy and negotiation with the Federal government.
- Managed the revenue collection cycle of \$100M+ in Federal grants, State appropriations, and Dedicated funds.
- Managed the annual disbursement of \$165M+ in State and Federal grants to 300+ non-profit providers.

Jacob Bowling, MSW
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304.663.1171
jake@bowlingbizpa.com

Community Behavioral Health - Data-Informed Decision Making - Integrated Care – Nexus of Policy and Practice –
Healthcare Finance and Operations -- Service Design and Implementation

Professional Experience

Bowling Business Strategies LLC *Founder and Managing Principal*

February 2017 - Present

- ❖ Founded healthcare consulting firm in public and behavioral health policy and practice improvement, community-based systems development, strategic planning, organizational change management, policy analysis/translation, content development, proposal/new business development, workflow redesign, and meeting planning/facilitation.
- ❖ Serves as Project Director for two Centers for Medicare and Medicaid Services' grants to the Delaware Division of Medicaid and Medical Assistance -- SUPPORT Act Planning Grant and SUPPORT Act Demonstration Grant -- overseeing the assessment and capacity expansion of Delaware's substance use treatment and recovery system of care.
- ❖ Provides subject matter expertise in the firm's Certified Community Behavioral Health Clinic (CCHBC) portfolio, including its contract with the National Council for Mental Wellbeing's CCBHC Success Center
- ❖ Serves as chief project manager of Delaware's State Opioid Response Grant, supporting implementation of policy and programmatic deliverables, including technical assistance initiatives and service delivery design and implementation.
- ❖ Serves as Senior Policy Advisor for *Olmstead* Court Monitor, advising the Court Monitor and State of programmatic and policy solutions to prevent needless institutionalization of persons with disabilities and transition them out of skilled nursing facilities and behavioral health institutional settings.
- ❖ Provides subject matter expertise on the service delivery design of a crisis peer respite model in Pennsylvania.
- ❖ Has implemented various projects with national, state, and local organizations to improve behavioral health services, including (but not limited to): coaching to peer support and HIV outreach teams on harm reduction and active engagement best practices, design and implementation support of a housing stabilization program to prevent infant mortality among pregnant women with behavioral health conditions, project management of a inpatient hospital accreditation and quality improvement initiative, strategic planning on preventing/reducing violence in psychiatric state hospitals; design of medications for opioid use disorder technical assistance initiatives.

National Council for Behavioral Health (New Name: National Council for Mental Wellbeing)

August 2014 – October 2017

Senior Advisor (2017), Assistant Vice President (2015-2017) & Director of Practice Improvement (2014-2015)

- ❖ Shared strategic and operational oversight with Vice President, Practice Improvement of more than 60 discrete federal, state and local training and technical assistance initiatives; 52 staff (10 direct reports both, on-site and remote); and annual budget of more than \$20 million.
- ❖ Served as Key Personnel on federal contracts, including, but not limited to, SAMHSA's Center for Behavioral Health Financing Reform and Innovation (Project Manager); the SAMHSA-HRSA Center for Integrated Health Solutions (Technical Assistance Lead); the Centers for Medicare and Medicaid Services Care Transitions Network (Practice Improvement Specialist).
- ❖ Oversaw the National Council's consulting team which provides expert consultation to government agencies, providers, health systems, health plans, and other stakeholders
- ❖ Oversaw the National Council's contracts department, leading negotiations and client/consultant management
- ❖ Served as proposal writer for federal proposals, bringing in \$10 million of new business over the past year
- ❖ Served as lead subject matter expert on intersection between housing policy and systems, providing content and leading editing for Using Medicaid to Finance and Deliver Services in Supportive Housing; presented on intersections between housing and behavioral health at conferences; responded to housing-related rules and regulations, and led the National Council Conference's housing and homelessness track

Mental Health Association of Southeastern PA (MHASP)

June 2009- August 2014

Director of Advocacy and Policy (2009-2012), Program Manager (2012-2013), Housing Systems Advocate (2013-2014)

- ❖ Developed and operationalized organization’s public policy initiatives, serving as the organization’s key expert on the Affordable Care Act, housing policy, and other policy trends that impact individuals with behavioral health conditions and their families
- ❖ Supervised over 20 staff who work in individual advocacy and innovative peer & recovery-oriented pilot programs in the Philadelphia region, managing an annual budget of nearly \$1 million
- ❖ Directed one of the four certified health exchange navigator programs in Pennsylvania, as well as other innovative programming, and assisted with the City’s response to Occupy Philadelphia encampments of individuals experiencing homelessness
- ❖ Trained staff on engagement, motivational interviewing, boundaries, documentation, recovery & resiliency, time management, cultural competence and crisis management
- ❖ Assisted in program development & environmental readiness: worked with other collaborators on the SAMHSA grant, including Aids Activities Coordinating Office, the Health Federation, and six HIV Care sites in Philadelphia
- ❖ Contracted by the City of Philadelphia as the Project Coordinator of the 100,000 Homes Campaign, an initiative to identify and find homes for the most vulnerable individuals experiencing homelessness in Philadelphia

Education and Training

May 2010

Temple University
Masters of Social Work

- ❖ Research Assistant for Dr. Karin Eyrich-Garg
 - Supported comprehensive research studies assessing spirituality/religion, social connections, and technology use among individuals experiencing homelessness
- ❖ Graduate Writing Tutor

Alderson-Broadus College *Bachelors of Arts in Christian Studies*

May 2007

- ❖ Academic Honors: Summa Cum Laude, Dean’s List, Chaplain’s Assistant, Senior of the Year Award

National Council for Community Behavioral Health, Addressing Health Disparities Leadership Program, 2012

- ❖ Executed a stretch project focused on implementing a multi-faceted communication plan on the impact of Medicaid expansion on individuals with mental illnesses and substance use disorders

Center for Progressive Leadership’s Emerging Leaders Program

2012

- ❖ Selected to participate in a fellowship that includes training and individualized coaching in community organizing, political landscaping, fundraising, public policy, and leadership

Board of Directors, Project HOPE (Healthcare for the Homeless Primary Care Organization/FQHC), 2013; Board of Directors, West Virginia Coalition to End Homelessness (2017-2022)

RACHAEL MARIE MATULIS, MPH

Ponte Vedra, FL | (646) 387-1047 | rachael@bowlingbizpa.com

SUMMARY OF QUALIFICATIONS

Health Policy Professional with experience leading development of nationally disseminated reports and webinars, overseeing implementation of foundation and federal grants, and developing data collection and provider assessment tools in both public and private sectors. Significant experience with Medicaid payment and delivery system reforms and innovations related to behavioral health, oral health, and primary care. Excel at overseeing projects, team members, and subcontractors to ensure high-quality work while meeting deadlines. Core capabilities include:

Research Studies | Data Collection & Analysis | Report Preparation
Project Management | Team Leadership | Presentations

PROFESSIONAL EXPERIENCE

BOWLING BUSINESS STRATEGIES, Philadelphia, PA

April 2020 – Present

Principal

- Oversee a portfolio of projects related to behavioral health payment and delivery system reform, with a focus on improving care delivery for vulnerable populations.
- Proactively lead business development efforts, and effectively generate new business and by leveraging professional contacts, researching opportunities on new/existing clients, writing grant proposals, and developing new products.
- Manage subcontractors, funder relations, and budgets to ensure high-quality, efficient production of deliverables.
- Lead development of nationally disseminated reports, webinars, and technical assistance tools designed to help improve care for individuals with mental health and/or substance use disorders; recent topics include assessment of the Certified Community Behavioral Health Clinic (CCBHC) model and key innovations in telebehavioral health during COVID-19.
- Serve as a Justice Community Opioid Intervention Network (JCOIN) Scholar, a program designed to help advance and translate research related to substance use disorders in justice settings.
- Conceived, developed, and implemented several national initiatives focused on integration of oral health and behavioral health; serve as lead faculty for a Project ECHO® on an oral health integration project for behavioral health providers.

CENTER FOR HEALTH CARE STRATEGIES, Hamilton, NJ

December 2016 – April 2020

Associate Director, Payment Reform (December 2019-Present)

Senior Program Officer (December 2016-December 2019)

- Led CHCS' portfolio of projects related to design, implementation, and evaluation of payment reform initiatives focused on primary care and behavioral health for low-income Americans.
- Managed project team members, subcontractors, funder relations, and budgets to ensure high-quality, efficient production of deliverables; mentored junior staff and oversaw direct reports.
- Led meetings and interviews with senior-level state officials, physician and health system leadership, health plan executives, and community-based organizations.
- Routinely presented on national webinars, expert panels, and state and national conferences on issues related to payment and delivery system reform.
- Published over a dozen briefs, blogs, and technical assistance tools related to delivery system and payment reform models, with a focus on Medicaid accountable care organizations, primary care, and behavioral health.

MAGELLAN BEHAVIORAL HEALTH, Newtown, PA

April 2014 – November 2016

Outcomes Manager

- Led the development of numerous reports evaluating the quality and cost of behavioral health services provided to Medicaid recipients across Magellan's five Pennsylvania managed care county contracts.
- Designed and implemented comprehensive program evaluations using various data types, including member satisfaction surveys, clinical functioning tools, chart audits, and Medicaid claims data.
- Experienced in cross-functional collaboration with Senior Leadership across Magellan's Network, Finance, Clinical, Analytics, and Quality Improvement departments, both at a local and corporate level.
- Routinely presented report findings and recommendations to key internal and external stakeholders, including executive staff from network providers and HealthChoices county administrators.

- Assisted with statewide performance improvement projects, such as implementing and evaluating initiatives to help reduce inpatient hospital readmission rates and improve follow-up after hospitalization rates.
- Conducted program evaluation trainings for contracted counties and network providers; for example, presented on data visualization techniques for Delaware County behavioral health county staff and providers.
- Onboarded and managed work deliverables for one direct report (Quality Improvement Outcome Specialist).

U.S. GOVERNMENT ACCOUNTABILITY OFFICE (GAO), Washington, D.C.

June 2007 – April 2014

Senior Analyst (2010-April 2014)

Analyst (2008-2010)

- Planned and conducted health policy research and analysis for U.S. congress; evaluated wide array of Medicare programs and policies, including federal oversight of nursing home quality, physician self-referral practices, payment for home oxygen equipment, and accreditation of advanced diagnostic imaging facilities.
- Served as team project manager for congressionally-mandated studies; developed project tasks and timelines and reviewed team members' work to ensure quality and timeliness of deliverables.
- Designed and implemented qualitative and quantitative data collection techniques, such as review of U.S. laws and federal regulations, structured interviews, web-based surveys, Medicare claims analyses, and cost analyses.
- Drafted key sections of numerous published reports, which included recommendations to improve efficiency and effectiveness of federal health care programs.
- Routinely briefed management, congressional staff members, and senior federal agency officials on research findings.

Graduate Intern (2007)

- Served Congressional clients by examining federal oversight of consolidated health center program.
- Developed plan for mapping geographic locations of federally funded health centers and worked with research support team to implement data analysis.
- Led interviews with officials from federally funded primary care associations.

COLUMBIA UNIVERSITY, New York City, NY

2006 – 2008

Research Assistant

- Analyzed data on various aspects of mental health market, such as mental health expenditures, psychiatric hospital mergers, and psychotropic drug trends.
- Recognized by lead author for providing valuable research assistance for two published papers.

SOUNDVIEW COMMUNITY HEALTH CENTER, Bronx, NY

2005 – 2006

AmeriCorps VISTA* Project Assistant

- Collaborated with physicians, case managers, and medical assistants to implement two federally funded projects aimed at improving quality of care for medically underserved populations.
- Collected and analyzed clinical data for Diabetes Collaborative using Patient Electronic Care System database.
- Reviewed supply and demand data to better align resources and reduce patient wait time.
- Assisted with grant writing to renew federal funding for health center and satellite sites.
- Helped implement bi-weekly diabetes support group meetings and created brochures to advertise health center events.

SELECTED REPORTS

Served as key contributor to the following nationally disseminated reports, briefs, and blogs:

- R. Matulis and J. Bowling. *Oral Health, Mental Health, and Substance Use Treatment: A Framework for Increased Coordination and Integration*. National Council for Mental Wellbeing. November 2021.
- R. Matulis and D. Schuffman. *Transforming State Behavioral Health Systems: Findings from States on the Impact of CCBHC Implementation*. National Council for Mental Wellbeing. October 2021.
- R. Houston, J. Lloyd, D. Crumley, R. Matulis, A. Keehn, N. Cozier. *The MassHealth Accountable Care Organization Program: Uncovering Opportunities to Drive Future Success*. Blue Cross Blue Shield Foundation. May 2021.
- R. Matulis and J. Bowling. *Environmental Scan of Oral and Behavioral Health Integration Models*. National Council for Behavioral Health. October 2020.

- R. Matulis and D. Crumley. *Driving Primary Care Innovation through Medicaid Managed Care: State Approaches*. Center for Health Care Strategies. CHCS Blog. September 2019.
- M. Bailey, R. Matulis and K. Brykman. *Behavioral Health Provider Participation in Medicaid Value-Based Payment Models: An Environmental Scan and Policy Considerations*. National Council for Behavioral Health. September 2019.
- D. Crumley, R. Matulis, K. Brykman, B. Lee, and M. Conway. *Advancing Primary Care Innovation in Medicaid Managed Care: A Toolkit for States*. Center for Health Care Strategies. August 2019.
- R. Matulis. *It's Not Just Risk: Why the Shift to Value-Based Payment is also about Provider Flexibility*. CHCS Blog. March 21, 2019.
- R. Matulis, R. Houston. *We Need More Data on Medicaid ACOs to Determine Drivers of Success*. CHCS Blog. December 3, 2018.
- R. Matulis, D. Crumley. *Advancing Primary Care Innovation through Medicaid Managed Care*. CHCS Blog. June 4, 2018.
- R. Matulis. *Prioritizing Social Determinants of Health in Medicaid ACO Programs: A Conversation with Two Pioneering States*. CHCS Blog. May 2, 2018.
- R. Matulis and J. Lloyd. *The History, Evolution, and Future of Medicaid Accountable Care Organizations*. Center for Health Care Strategies, February 2018.
- R. Matulis. *The Evolution of Shared Savings Payment Methodologies for Medicaid Accountable Care Organizations*. CHCS Blog. July 28, 2017.
- R. Matulis. *Medicaid Accountable Care Organization Shared Savings Programs: Options for Maximizing Provider Participation and Program Sustainability*. Center for Health Care Strategies, July 2017.
- M. Herman Soper, R. Matulis, and C. Menschner. *Moving Toward Value-Based Payment for Medicaid Behavioral Health Services*. Center for Health Care Strategies, June 2017.
- J. Lloyd and R. Matulis. *Reviewing Medicaid ACO Progress in Leading-Edge States*. CHCS Blog. February 16, 2017.
- *Medicare Imaging Accreditation: Establishing Minimum National Standards and an Oversight Framework Would Help Ensure Quality and Safety of Advanced Diagnostic Imaging Services*. GAO-13-246. Washington, D.C. May 31, 2013.
- *Medicare Physician Feedback Program: CMS Faces Challenges with Methodology and Distribution of Physician Reports*. GAO-11-720. Washington, D.C. August 12, 2011.
- *Medicare Home Oxygen: Refining Payment Methodology Has Potential to Lower Program and Beneficiary Spending*. GAO-11-56. Washington, D.C. January 21, 2011.

SELECTED PANELS & PRESENTATIONS

- Invited Participant. *Expert Meeting on Applying Open Science Practices to Health Services Research*. AcademyHealth. April 2021.
- R. Matulis. *Oral and Behavioral Health Integration: Rationale for Increased Coordination and Integration*. Poster Presentation for the Oral Health Progress and Equity Network (OPEN) National Conference, October 2020.
- R. Matulis. *Has Payment Reform Delivered on the Promise of Lower Cost and Better Care? Panel Discussion*. New York Health Plan Association Annual Conference, November 2019.
- Invited Participant. *NQF Measure Incubator: Expert Panel on ACO Benchmarking*. National Quality Forum. June 2018.
- R. Matulis. *State Innovations in Value-Based Care: ACOs and Beyond*. Value Incentives and Systems Innovation Collaborative Meeting, National Academy of Medicine, May 2017.
- R. Matulis. *State Innovations in Value-Based Payment for Behavioral Health*. Embracing Change & (Re)Shaping the Future of Community Behavioral Healthcare. Community Behavioral Healthcare Association Conference, December 2017.
- A. Hamblin and R. Matulis. *Key Considerations for Value-Based Payment Substance Use Disorder Program Design*. Medicaid Innovation Accelerator Program. National Webinar Series, October 2017.

EDUCATION

Master of Public Health, Columbia University, New York City, NY

- *Concentration*: Health Policy and Management

- *GPA*: 3.95 / 4.00

Bachelor of Science in Health Science Education (*summa cum laude*), University of Florida, Gainesville, FL

- *GPA*: 3.87 / 4.00
- *Honors*: Florida Academic Scholars, American Association of Health Education Outstanding Undergraduate of the Year, BK & Betty Stevens Scholarship

ERICA DAMLER SAHM, MPH

PUBLIC HEALTH CONSULTANT
INDIANAPOLIS, IN

 WEBSITE: GLACIERHEALTHCARECONSULTING.COM

 Cell: (317)340-7421  Email: ERICA@GLACIERHEALTHCARECONSULTING.COM

PROFESSIONAL SUMMARY

Motivated health education graduate with clinical research and healthcare consulting experience having graduated from George Washington University with a Master of Public Health degree. Focused on patient advocacy through education and relationship building. High energy, goal oriented and success driven with a desire to make an impact on as many lives as possible. My understanding of the US health system, health policy, and ability to communicate with physicians and other stakeholders gives me the base for success in making change.

STRENGTHS

- | | | | |
|---------------|---------------|--------------------|---------------------|
| ✓ Situational | ✓ Research | ✓ US Health | ✓ Copy Editing |
| Adaptability | Application | Systems - Policy & | ✓ Literature Review |
| ✓ Research | ✓ Excellent | Advocacy | ✓ Report Creation |
| Comprehension | Stakeholder | ✓ Passionate and | |
| | communication | Confident | |
-

EDUCATION

THE GEORGE WASHINGTON UNIVERSITY

June 2016 – Dec 2019

Master of Public Health - 3.6/4.0 GPA

- Related Coursework: Global Health Systems, Biostatistical Applications for PH, Biological Concepts, Management and Policy Approaches to PH, Social & Behavioral Approaches to PH, Program Evaluations, Planning and Implementing Health Promotion Programs, Data Management & Analysis (SPSS & SAS), US Health Services Delivery

BUTLER UNIVERSITY

August 2009 – May 2014

Bachelor of Science: Human Movement and Health Science Education 3.4/4.0 GPA

- Butler Undergraduate Research Conference (August 2011) - Oral Presentation at Butler University on *c. Elegans*
- Annual *c. Elegans* Worm Meeting -IU School of Medicine - Oral Presentation on *c. Elegans* research in neurobiology
- Butler Summer Institute (August 2010) – Poster Presentation at Butler University on *c. Elegans* research in neurobiology

PUBLIC HEALTH EXPERIENCE

PUBLIC HEALTH CONSULTANT

Glacier Healthcare Consulting

NOVEMBER 2020 – Present

- Explore and presented new business opportunity markets in the Medicaid space for individual businesses
- Create solutions based on state best fit identification through research of current practices and solution need
- Evaluate opportunities for clients based on qualitative and quantitative measures to create hierarchy of needs approach

WORK EXPERIENCE CONTINUED

CLINICAL RESEARCH COORDINATOR
Indiana University Health

MARCH 2020 – Present

- Improved data collection taking patient survey online
- Manage database for up to 6 projects at a time including survey writing and dissemination, data collection and data import/export for analysis
- Literature search and review
- Oversee multiple research projects at a time including IRB submission, database creation, patient identification and communication, and data analysis
- Monitor all documentation for Methodist Urology Research, including auditing, to ensure compliance with informed consent and case reports
- Write and review protocols & consents for human subjects research

RESEARCH INTERN
Health Management Associates

JANUARY 2019 – JUNE 2019

- Research support to consultants and principles within the Indianapolis office ie: rural hospital closings in US, State of the State evaluations, Medicaid legislation tracking, etc.
- Created project for the provision of preventive health care in the Medicaid population through investigation of managed care plans, specifically regarding well-child visit performance
- Research support for projects involving FFS, APMs, quality care initiatives, HEDIS measures, NCQA Accreditation, and barriers to care at patient, provider and health plan levels

GLOBAL HEALTH PROGRAM EVALUATION
The George Washington University

SPRING 2018

Evaluation of Integrated Behavior Health Clinic for Adults with severe mental illness in Worcester County, MD

- Group project evaluating a proposal for integrating primary care in a behavioral health clinic

MANAGEMENT AND POLICY APPROACHES TO PUBLIC HEALTH
The George Washington University

FALL 2018

Improving Health Outcomes for Adolescents in Indiana Foster Care

- Researched adolescent health outcomes and the Indiana Foster Care system developing a community profile and finding existing programs to support best practices
- Created SWOT Analysis comparing limitations for improving health outcomes
- Created logic model highlighting key factors imperative to implementing program, budget & program proposal to present to key stakeholders
- Developed policy problem, brainstormed and illustrated different options, presented a recommendation

Social and Behavioral Approaches to Health
The George Washington University

FALL 2017

Improve Health Outcomes for Adolescent Foster Children in Indianapolis, IN

- Conceptualized a health intervention using the health belief model targeting health outcomes for adolescent foster children in Indianapolis, IN
- Researched and answered questions regarding why the target population is a priority
- Established immediate theory-based, intermediate behavioral, and long-term health objectives
- Explored potential limitations and current programs in states, such as WI, who have been successful in implementing similar programs