Beyond Compliance: Creating a Culture of Quality

NASDDDS 2018 Directors Forum & Annual Conference
Beyond Compliance: Creating a Culture of Quality

NASDDDS Directors Forum & Annual Conference
November 7-9, 2018 • Alexandria, Virginia

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OPTUM
EXHIBITORS HOURS
Thursday: 7:30 AM – 6:30 PM and Friday: 7:30 AM – 11:00 AM

Thursday Reception in the Exhibitor Area
5:00 PM – 6:30 PM

Please Plan to Visit the Exhibitors in the Edison Foyer ABCD
(see ‘Exhibitors List’ insert in the folder packet for floor plan)

EXHIBITORS
Acumen Fiscal Agent
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Anthem, Inc.
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Foothold Technology
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Health Risk Screening
I-TRAIN
Liberty Healthcare Corporation
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Premier Healthcare Services (Aveanna)
Qlarant, Inc.
Relias
RSM US LLP
Scioto Properties
The Columbus Organization
The Rushmore Group LLC
Therap Services LLC
VERTESS
WellSky
Conference Area Floor Plan...

THE WESTIN ALEXANDRIA
400 Courthouse Square • Alexandria, Virginia

Conference Sessions, Exhibits, Breaks, and Registration are all located on the Second Floor of the Hotel

LOCATIONS

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<td>Keynote, Opening Plenary Panel &amp; Plenary Panels (Thursday-Friday)</td>
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SESSIONS AT A GLANCE...

WEDNESDAY NOVEMBER 7, 2018

7:30 AM – 8:30 AM  Breakfast ...................................................... Edison Foyer D
7:30 AM – 5:00 PM  REGISTRATION ........................................... Inventors Foyer
8:30 AM – 4:30 PM  Directors Forum ............................................. Edison D

Open Only to State DD Directors, Proxy, and/or Designated Staff

THURSDAY NOVEMBER 8, 2018

7:30 AM – 8:30 AM  Breakfast ...................................................... Edison Foyer ABCD
7:30 AM – 5:00 PM  REGISTRATION ........................................... Inventors Foyer
7:30 AM – 6:30 PM  EXHIBITS ...................................................... Edison Foyer ABCD
8:30 AM – 8:45 AM  Welcome and Introductions ......................... Edison ABCD
8:45 AM – 9:30 AM  Keynote Address ......................................... Edison ABCD
9:30 AM – 10:30 AM Plenary Panel ............................................. Edison ABCD
10:30 AM – 10:45 AM Coffee / Tea Break ................................... Edison Foyer ABCD
10:45 AM – 12:00 PM Plenary Panel ............................................. Edison ABCD
12:00 PM – 1:15 PM  Compass Award Luncheon ......................... Edison ABCD
1:15 PM – 2:30 PM  Plenary Panel ............................................. Edison ABCD
2:30 PM – 3:30 PM  Plenary Panel ............................................. Edison ABCD
3:30 PM – 3:45 PM  Break ......................................................... Edison Foyer ABCD
3:45 PM – 5:00 PM  Plenary Presentation ................................... Edison ABCD
5:00 PM – 6:30 PM  Reception .................................................... Edison Foyer ABCD

FRIDAY NOVEMBER 9, 2018

7:30 AM – 8:30 AM  Breakfast ...................................................... Edison Foyer ABCD
7:30 AM – 11:00 AM REGISTRATION ........................................... Inventors Foyer
7:30 AM – 11:00 AM EXHIBITS ...................................................... Edison Foyer ABCD
8:30 AM – 9:30 AM  Opening Plenary Panel ............................... Edison ABCD
9:30 AM – 10:30 AM Plenary Panel ............................................. Edison ABCD
10:30 AM – 11:00 AM Coffee / Tea Break and Check Out ....... Edison Foyer ABCD
11:00 AM – 12:00 PM Plenary Presentation ................................ Edison ABCD
12:00 PM – 12:15 PM Conference Wrap Up and Conclusion ........ Edison ABCD
**DIRECTORS FORUM**  
*Open Only to State DD Directors, Proxy, and/or Designated Staff*

**LOCATION** Edison D

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<td>Breakfast</td>
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<td>Welcome / Member Introductions</td>
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<td>Presentation and Discussion</td>
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<td>Director’s Round Table</td>
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<td>Coffee / Tea Break</td>
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<td>Presentation and Discussion</td>
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<td>4:00 PM</td>
<td>NASDDDS Updates</td>
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<td>Business Meeting</td>
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<td>5:00 PM</td>
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THURSDAY, NOVEMBER 8

BREAKFAST ........................................................................................................... 7:30 AM – 8:30 AM
LOCATION Edison Foyer ABCD

Thank You to Anthem for Sponsoring the Breakfast

REGISTRATION ................................................................................................. 7:30 AM – 5:00 PM
LOCATION Inventors Foyer

EXHIBITS ........................................................................................................... 7:30 AM – 6:30 PM
LOCATION Edison Foyer ABCD

Please be Sure to Visit our Exhibitors in the Edison Foyer ABCD

WELCOME, KEYNOTE, and PLENARY PRESENTATIONS ................................. 8:30 AM – 10:30 AM
LOCATION Edison ABCD

WELCOME ......................................................................................................... 8:30 AM – 8:45 AM

Mary Lee Fay
Executive Director
NASDDDS

John Martin
President NASDDDS Board of Directors
Director, Ohio Department of Developmental Disabilities

KEYNOTE ADDRESS ............................................................................................. 8:45 AM – 9:30 AM

ACL Snapshot

INTRODUCTION
Bernard Simons
Past President, NASDDDS Board of Directors
Deputy Secretary, Maryland Developmental Disabilities Administration

KEYNOTE
Lance Robertson
Administrator and Assistant Secretary for Aging
Administration for Community Living

Lance Robertson will talk about key priorities for the Administration for Community Living and the U.S. Department of Health and Human Services (HHS), as well as exciting opportunities that are emerging as HHS works to transform to a system of value-based health care.
THURSDAY, NOVEMBER 8

PLENARY PANEL ........................................................................................................... 9:30 AM –10:30 AM
LOCATION Edison ABCD

Enhancing Health and Welfare of Individuals Receiving HCBS

INTRODUCTION
Alex Bartolic
Vice President/President Elect, NASDDDS Board of Directors
Director, Minnesota Disability Services Division

PRESENTERS

Jennifer Johnson
Deputy Director
Administration on Intellectual and Developmental Disabilities
Administration on Disabilities
Administration for Community Living
U.S. Department of Health and Human Services

Melissa Harris
Senior Policy Advisor
Disabled and Elderly Health Policy Group
Centers for Medicare & Medicaid Services

Megan H. Tinker
Senior Advisor for Legal Affairs
Office of Counsel to the Inspector General
Office of Inspector General
U.S. Department of Health and Human Services

In early 2018, HHS OIG-ACL-OCR issued a joint report entitled, “Ensuring Beneficiary Health & Safety in Group Homes”. This session will focus on various aspects of this report, including an overview of HHS OIG inquiries and the model practices in the joint report that states can use as a roadmap and toolbox for better compliance oversight and health and safety outcomes. Recommendations and actions implemented by CMS as a result of the HHS OIG inquiries will be discussed. The session will also highlight effective strategies states have deployed to both implement recommendations outlined in the joint report and other efforts to promote greater self-determination and community integration. The session will discuss broader policy recommendations for preserving the well-being of beneficiaries and improving quality of HCBS over time based upon ACL’s funded projects under the "Living Well-Model Approaches for Enhancing the Quality, Effectiveness and Monitoring of Home and Community Based Services for Individuals with Developmental Disabilities".
Recent reports from federal and state agencies, along with highlights from media reports, have put incident management in the spotlight. These recent activities demonstrate existing gaps in compliance oversight, potential risks to beneficiaries and suggests the need for updated tools to improve health and safety outcomes. Two states will discuss the approach taken to coordinate the many agencies.
involved in incident management in their state, and the models used to create systemic improvements. The panel will include representatives from the state agency in both Massachusetts and Tennessee and a Public Consulting Group (PCG) representative discussing federal and state reports and HCBS incident management and mortality review improvements and challenges.

Topics to be discussed include:

- Challenges faced by states in management and oversight of health and safety policies and procedures and mortality review.
- Best practices for state incident management and investigation and mortality review, including changes in statute effecting multi-agency collaboration.
- Innovative strategies for improving compliance oversight and quality of services while ensuring the health and safety of individuals.

COMPASS AWARDS LUNCHEON .................................................................12:00 PM – 1:15 PM
LOCATION Edison ABCD

Thank You to Benchmark Human Services for Sponsoring the Award Luncheon

Robert M. Gettings Compass Award

The NASDDDS Board has voted to present David Braddock, Ph.D. with the 2018 Robert M. Gettings Compass Award. This award is presented to individuals who, while working in the private sector, have made a significant contribution to the development of publicly funded state service systems for people with developmental disabilities through research, the design of new service models, training, technical assistance, and consultation.

AWARD WINNER

David Braddock

David Braddock, Ph.D., was the Senior Associate Vice President of the University of Colorado (CU) System, Executive Director of the Coleman Institute for Cognitive Disabilities, and the Coleman-Turner Chair in Cognitive Disability in the CU Department of Psychiatry, School of Medicine, Anschutz Medical Campus for the last 17 years (from 2001 to June 2018).

Prior to coming to Colorado in 2001, he was also founding head of the University of Illinois at Chicago's (UIC) Department of Disability and Human Development and Director of its Research Institute. During his 20-year career at UIC, he was instrumental in establishing the nation's first Ph.D. program in disability studies and was founding director of UIC’s federally chartered Center of Excellence in Developmental Disabilities. Earlier in his career, he worked in governmental affairs and research in Washington, D.C. at the U.S. Department of Health, Education, and Welfare Secretary's Committee on Mental Retardation, and at the Council for Exceptional Children (CEC). Prior to Washington, David worked at two
state institutions for people with intellectual disabilities in Texas and Missouri as a research technician and classroom teacher.

His research interests include long-term care policy, health promotion and disease prevention, and public spending for developmental disabilities. He has presented in forty-eight states, seven foreign countries, and provided invited testimony in 15 state legislatures. His work has influenced developmental disability legislation, litigation, and appropriations decisions in many states and nationally. He is the recipient of numerous awards; including most recently the 2013 ANCOR Foundation President's Award, the 2012 AAIDD Leadership Award, and the 2011 Thomas Jefferson Award from the Board of Regents of the University of Colorado.

PLENARY PANEL .................................................................................................................................1:15 PM – 2:30 PM
LOCATION Edison ABCD

Using National Core Indicators Data to Inform State Quality Improvement Efforts

INTRODUCTION

Jordan Scheff
Member-at-Large, NASDDDS Board of Directors
Commissioner, Connecticut Department of Developmental Services

PANELISTS

Alix Bonardi
NCI Project Director
HSRI

Mary Lou Bourne
Director of National Core Indicators and Quality Assurance
NASDDDS

Kimberly Stock
Director of Quality Assurance
Missouri Division of Developmental Disabilities

As states strive to develop continuous quality improvement throughout their DD systems, more and more attention is being paid to "person reported outcome performance measures"- or PRO-PM's. Acute health care and long-term care organizations recognize the importance of balancing their improvement efforts
between measures of both health and safety and quality of life. This session will describe some of the options for using NCI data in such a manner, including important considerations when benchmarking and trending data. Presenters will share NCI data, including scales that summarize the extent to which people are making choices within their everyday lives and in major life decisions. Missouri will present a state's perspective on how NCI has informed their robust quality improvement projects in recent years.

PLENARY Panel ........................................................................................................................................2:30 PM – 3:30 PM
LOCATION Edison ABCD

Electronic Visit Verification and Self-Direction: Planning for Success

INTRODUCTION
Lee Grossman, MPA
Member-at-Large, NASDDDS Board of Directors
Administrator, Developmental Disabilities Section
Wyoming Department of Health/Behavioral Health Division

PANELISTS

Mollie Murphy
Applied Self-Direction

Jane Lawrence
Applied Self-Direction

Alex Bartolic
Director
Disability Services Division
Minnesota Department of Human Services

The implementation of Electronic Visit Verification (EVV) has significant implications for self-directed personal care services. Developing an EVV solution that honors the key tenets of self-direction — control, flexibility, and choice — can be a challenge. This session will include an overview of specific strategies that can serve as a "blueprint" for EVV that supports self-direction. This session will also describe Minnesota’s EVV implementation efforts; highlighting their stakeholder engagement process.
THURSDAY, NOVEMBER 8

COFFEE / TEA BREAK .................................................................................................................. 3:30 PM – 3:45 PM
LOCATION Edison Foyer ABCD

Please be Sure to Visit our Exhibitors in the Edison Foyer ABCD During the Break

PLENARY PRESENTATION ........................................................................................................... 3:45 PM – 5:00 PM
LOCATION Edison ABCD

Quality: Moving from Reactive to Proactive

INTRODUCTION
Mary Lou Bourne
Director of National Core Indicators and Quality Assurance
NASDDDS

PRESENTER
Harry S. Hertz, PhD, FAAAS, HFACHE
Director Emeritus
Baldrige Performance Excellence Program
National Institute of Standards and Technology

Dr. Hertz will speak from his extensive experience working with large and small organizations, private companies, government entities, health care and education, all focused on developing a systematic way to achieve performance excellence. Creating the motivation and desire to continuously seek improvement opportunities, using data to learn and to compare your results, and moving from compliance to a proactive pursuit of quality will be discussed.

RECEPTION .............................................................................................................................. 5:00 PM – 6:30 PM
LOCATION Edison Foyer ABCD

Join us at the reception which is open to all conference attendees and offers a great opportunity to meet people and network.
Cash Bar
Complimentary Hors d ‘Oeuvres

Thank You to Therap Services for Sponsoring the Reception

Making Dinner Plans after the Reception? Hop aboard the free King Street Trolley which runs between the King Street Metrorail Station and the Potomac River waterfront with many stops for hopping on and off to explore the shops, restaurants, and attractions found along Alexandria’s historic main street! For specific schedules, see www.dashbus.com/Trolley.
FRIDAY, NOVEMBER 9

Breakfast ........................................................................................................7:30 AM – 8:30 AM
LOCATION Edison Foyer ABCD

REGISTRATION .................................................................................................7:30 AM – 11:00 AM
LOCATION Inventors Foyer

EXHIBITS ...........................................................................................................7:30 AM – 11:00 AM
LOCATION Edison Foyer ABCD

Please be Sure to Visit our Exhibitors in the Edison Foyer ABCD

OPENING PLENARY PANEL ...............................................................................8:30 AM – 9:30 AM
LOCATION Edison ABCD

Updates from the Hill

INTRODUCTION
Dan Berland
Director of Federal Policy
NASDDDS

What can we expect from Congress in 2019 and beyond? Key disability policy staffers will discuss the landscape for disability policy in Congress now and in the near future.

PANELISTS

Stuart Portman, MPH
Health Policy Advisor
Medicaid, CHIP, and ACA Exchange Senate Finance Committee

Stuart particularly values conversations on long-term care, data collection, and program integrity across state programs.

Michael Gamel-McCormick
Disability Policy Director for Senator Bob Casey of Pennsylvania

Michael is the Disability Policy Director for Senator Bob Casey of Pennsylvania working on health, education, employment, civil rights and justice, transportation, housing, and other issues related to federal disability policy.
FRIDAY, NOVEMBER 9

Kimberly Knackstedt  
Disability and Education Policy Advisor  
U.S. House of Representatives – Committee on Education and the Workforce Minority Staff  
under Ranking Member Bobby Scott (VA-03)

Sophie Trainor, RD  
Senior Policy Advisor

PLENARY PANEL ......................................................................................................................................... 9:30 AM – 10:30 AM  
LOCATION Edison ABCD

Medicaid:  
WHAT IS up Now and What to Expect in 2019 and Beyond

INTRODUCTION  
Laura Vegas  
Project Director for MCO Business Acumen  
NASDDDS

PANELISTS  
Rodney Whitlock  
Vice President, Health Policy  
ML Strategies

Ellen Nissenbaum  
Senior Vice President for Government Affairs  
Center on Budget and Policy Priorities

Rodney and Ellen will offer their insights into the future of entitlement policy, the federal budget, and the future of health care in the U.S. As we are all digesting the results of the midterm election, they will share their thoughts on the immediate future of the long-term care conversation.

COFFEE / TEA BREAK and CHECK OUT .................................................................................................. 10:30 AM – 11:00 AM  
LOCATION Edison Foyer ABCD
Friday, November 9

PLENARY PRESENTATION ................................................................. 11:00 AM – 12:00 PM
LOCATION Edison ABCD

Strengthening Protections for Social Security Beneficiaries
Act of 2018

INTRODUCTION
Barbara Brent
Director of State Policy
NASDDDS

PRESENTER
Curt Decker
Executive Director
National Disability Rights Network

On April 13, 2018, the Strengthening Protection for Social Security Beneficiaries Act of 2018 became law. This bill requires the Social Security Administration (SSA) to make annual grants to each state’s protection and advocacy (P&A) system for the purpose of conducting reviews of representative payees under the Supplemental Security Income (SSI) program and the Old Age, Survivors, and Disability Insurance (OASDI) program. This presentation will focus on the P&A systems role and responsibilities.

CONFERENCE WRAP UP AND CONCLUSION ........................................ 12:00 PM – 12:15 PM
LOCATION Edison ABCD

Mary Lee Fay
Executive Director
NASDDDS

Thank You to Alvarez and Marsal for Being a General Conference Sponsor
Welcome and Introductions

MARY LEE FAY became the NASDDDS Executive Director in August 2015. She joined NASDDDS in 2012 as the Director of National Core Indicators and the NASDDDS Coordinator for the Community of Practice project on Supporting Families. Her main focus is working with states to create sustainable systems that will fully engage people with intellectual/developmental disabilities in their communities and honor the families and relationships that support those outcomes.

Mary Lee has more than 35 years of working in the field of intellectual and developmental disabilities. She worked for the state of Oregon Developmental Disabilities Office from 1987 to 2012 and was the state administrator for the program from 2001 until 2012, supporting 22,000 children and adults with I/DD and their families. Highlights of her work in Oregon include: closure of all private and public ICF/IDs, implementation of a self-directed waiver using independent brokerages, and redesign of services to focus on person-centered thinking.

JOHN L. MARTIN was appointed as director in 2007, by then, Governor Strickland to the Ohio Department of Developmental Disabilities (DODD) then reappointed by Governor John Kasich in 2011. Prior to coming to the department, Martin was the executive director of a large diverse provider organization, a live-in house parent in a group home, a direct care worker with medically involved children, a special education teacher, and the president of a software company. He is also the parent of three children, one of whom has significant disabilities.

Martin received a bachelor’s degree in special education from Illinois State University and a Master’s degree in community psychology from Temple University.

Thank You to PCG for Being a Speaker Sponsor

Keynote Speaker

LANCE ROBERTSON was appointed to serve as Assistant Secretary for Aging and ACL’s Administrator on August 11, 2017. ACL was initially established in April 2012, bringing together federal advocacy for older adults and people with disabilities, along with most federal human services programs for older adults and people with intellectual and developmental disabilities, missions previously housed in multiple organizations across the U.S. Department of Health and Human Services. ACL was created around the fundamental principle that all people, regardless of age or disability, should be able to live where they choose, with the people they choose, and fully participate in their communities. In 2007, Mr. Lance Robertson became Oklahoma’s Director of the Aging Services, Oklahoma Department of Human Services. As Director of Aging Services, he was responsible for an annual budget of $325 million dollars (Medicaid/federal & state) and supervised 19 major programs, including the Older Americans Act program and the state’s home and community-based services Medicaid waiver (ADVantage). He led a statewide team of 225 staff members. Prior to that, he was at Oklahoma State University for 12 years, where he co-founded the Gerontology Institute and contractually served as Executive Director of PartnerShips for Aging, the largest regional gerontology association in the United States. Mr. Robertson was the recipient of the Oklahoma Aging Professional of the Year Award, the Salute to Leaders in Aging National Award, the
National CareHeroes Professional Award, and the 2015 National Association of States United for Aging & Disabilities (NASUAD) President's Award.

He was given 2013 Honorary Alumni Award status for the College of Human Sciences at Oklahoma State University. Mr. Robertson is a graduate of the 2010 Governor's Executive Development Program for State Officials, and a proud graduate of the first class (1997) of the Oklahoma Aging Advocacy Leadership Academy. His undergraduate degree is from Oklahoma State University and he has a Master in Public Administration degree from the University of Central Oklahoma. Mr. Robertson is past president of NASUAD, a chief national authority on aging and disability issues. He is a trustee for the Oklahoma Public Employees Association Political Action Committee (PAC) and a council member of the Edmond YMCA. He speaks at many local and national events, most recently at Montana’s 48th annual Governor's Conference on Aging. Mr. Robertson is also a veteran of the U.S. Army.

**Presenters / Panelists**

**JORDAN ALLEN** has career experience spanning nearly 25 years, within multiple State service delivery systems, supporting persons with Intellectual and Developmental disabilities as well as persons with behavioral health diagnosis. These experiences include Direct Supports, development and implementation of Quality Assurance and Improvement strategies across multiple service systems, Executive leadership within the private Not for Profit sector and Senior and Executive leadership within State Government. Mr. Allen has been a champion of community integration strategies, Vocational Training and integrated Employment Supports for persons with disabilities. Mr. Allen currently brings this experience and leadership to the Tennessee Department of Intellectual and Developmental Disabilities where he serves as the Deputy Commissioner of Program Operations.

**ALEX BARTOLIC** is the Director of Disability Services at the Minnesota Department of Human Services. She has extensive experience at the state and local level with home and community based services. After beginning her career in special education, she moved to develop supports for families, and community services for people with disabilities. Alex has been recognized as an innovator, and fostering new approaches that have enabled people with disabilities to live and work in their communities. She is currently leading a reform of Minnesota's home and community-based system to better respond to the expectations and future needs of Minnesotans with disabilities.

**ALIXE BONARDI** is the director of the intellectual and developmental disabilities team. She's also a senior policy associate, and she directs the National Core Indicators effort. Alike's work is driven by a passion for improving supports and services for people with intellectual and developmental disabilities. She’s particularly focused on applying her clinical experience and years working with people with developmental disability to working with public agency staff to measure and report on quality outcomes as a means to drive enhancements to systems of supports. Alike is experienced and skilled in participatory research, integrating her experience as a clinical occupational therapist and her efforts to engage a range of stakeholders in developing effective systems of support. In addition to supporting clients in the effective implementation and use of NCI, Alike also has deep understanding of the use of available national health data to describe the health outcomes of the population with intellectual and developmental disability. She is also a clinical assistant professor at the University of Massachusetts Medical School and teaches in the Shriver Center's LEND program, as well as in rotations for medical students.
Prior to joining HSRI, Alixe was the director of the Center for Developmental Disabilities Evaluation and Research at the University of Massachusetts Medical School's E.K. Shriver Center. While there, she developed a broad portfolio of projects including the development and implementation of risk management and quality improvement projects in DD services. She was principal investigator on several grants, including a falls prevention initiative, a systems change project to enhance access to assistive technology, and a Citizen's Jury to develop autism data collection recommendations.

MARY LOU BOURNE joined NASDDDS in November 2015 as the Director of Quality Assurance and NCI. In this role, Mary Lou supports states in their desire to develop excellent quality management systems, using data to inform decisions while balancing a focus on performance. Prior to her work at NASDDDS she was a partner and consultant with Support Development Associates. Mary Lou has consulted with statewide administrative systems, multi-state organizations, service provider agencies, and local government offices. While a partner at SDA, she designed and successfully implemented a model for establishing a person-centered service delivery system, including work on effectively managing and administering person centered practices from intake through service design, planning and delivery, through monitoring and improvement. She has written several articles and was instrumental in the development of The Learning Community for Person Centered Thinking. Through this work she designed leadership training and consultation needed to implement person-centered practices in all types of relationships throughout the system.

Mary Lou has been appointed as a Malcolm Baldrige National Quality Program Examiner four times, from 2004-2007, and has developed and launched four companies, (two nonprofit corporations, two for profit corporations).

LANEY BRUNER-CANHOTO, PhD, is the Assistant Commissioner for Quality Management at the Massachusetts Department of Developmental Services. As Assistant Commissioner for Quality, she oversees the quality management systems for the department, including but not limited to performance measure monitoring; home and community-based services waiver quality activities; risk management; licensure and certification of about 200 community providers of residential, day and employment services; health services; and a number of initiatives such as community integration activities and aging initiatives. Laney joined the department in January of 2014 in the role of Waiver Quality Management Systems Director. In this role, she focused on monitoring the quality management components of the three adult DDS home and community-based services waivers and children’s autism waiver and the four acquired brain injury and Money Follows the Person waivers, while developing transition plans for the CMS Community Rule. Laney possesses a wealth of experience and knowledge concerning quality management and improvement systems and HCBS waivers. Before coming to DDS, she was at the University of Massachusetts Medical School where she most recently served as the Director of Performance Improvement for Disability and Community Services Unit. In this role, Laney was responsible for developing quality management and performance improvement plans for several different service delivery programs including Money Follows the Person.

Laney is a person with lived experience of disability as she was born with cerebral palsy. Since 1991, she has worked in a variety of direct care, research, policy and management positions with elders and people with disabilities, focusing on quality management and aging with a disability. Laney possesses a masters in social work and a masters in public health from the University of South Carolina and a Ph.D. in gerontology from the University of Massachusetts/Boston.
CURT DECKER, JD, has been affiliated with the National Disability Rights Network (NDRN) since its inception in 1982. As executive director of the nation's largest non-governmental enforcer of disability rights, Curt oversees all activities related to training and technical assistance, membership services, and legislative advocacy.

Before founding NDRN with other P&A Directors, Curt served as Director of the Maryland P&A, the Disability Rights Maryland formally named Maryland Disability Law Center (MDLC). Curt also served as Director of the H.E.L.P. Resource Project for Abused and Neglected Children for four years, and was a VISTA worker prior to working as a senior attorney for Baltimore Legal Aid Bureau for five years.

Curt is also a past chair of the Consortium for Citizens with Disabilities (CCD), a coalition of over 100 national disability groups, and serves on the boards of Friends of Research. In his career, Curt also served as a legislative consultant for numerous groups, including the American Association on Intellectual and Developmental Disabilities (AAIDD), the National Public Law Training Center, and the Maryland Academy of Physician's Assistants. He is a graduate of Hamilton College and Cornell Law School.

DR. HARRY HERTZ, PhD, FAAS, HFACHE has been with the National Institute of Standards and Technology since 1973, originally as a research chemist, and then in a series of management positions including Director of the Chemical Science and Technology Laboratory. He served as the Director of the Baldrige Performance Excellence Program from 1995-June, 2013. He now serves as the Program's Director Emeritus, in a consulting capacity. Dr. Hertz has made presentations to a wide variety of audiences on elements of organizational excellence and change management, the Baldrige criteria for measuring performance excellence, and on health care quality improvement. He has been the intellectual driver behind the Baldrige Criteria for Performance Excellence and their evolving definition of performance excellence for almost 20 years.

He has a B.S. in chemistry from the Polytechnic Institute of Brooklyn and a Ph.D. from M.I.T. Following graduate school, Dr. Hertz spent two years as an Alexander von Humboldt Fellow at the University of Munich. He is a Fellow of the American Association for the Advancement of Science (AAAS) and an Honorary Fellow of the American College of Healthcare Executives. He is an Adjunct Associate Professor at the American University in Washington, D.C. and serves on several advisory committees. He currently serves on the Board of Trustees for Sibley Memorial Hospital, part of the Johns Hopkins Health System, and on the Johns Hopkins Medicine Patient Safety and Quality Committee.

JENNIFER JOHNSON is the Deputy Director of the Administration on Intellectual and Developmental Disabilities (AIDD), Administration on Disabilities, Administration for Community Living, U.S. Department of Health and Human Services. She oversees AIDD's administration of programs and initiatives related to individuals with intellectual and developmental disabilities, including programs funded under the Developmental Disabilities Assistance and Bill of Rights Act of 2000. In this capacity, she develops and coordinates programs and activities for the provision of an array of services for people with developmental disabilities nationwide and collaborates with a number of federal partners to promote quality community living for individuals with intellectual and developmental disabilities across the age span. Prior to joining AIDD, Johnson held positions in the Arlington County Public School system, at the Council for Exceptional Children and at The George Washington University where she was also an adjunct lecturer teaching master's level coursework in research methodology, special education, and public policy. Dr. Johnson earned her doctorate in special education from the George Washington University.
MELISSA HARRIS has been with the Centers for Medicare & Medicaid Services (CMS) since the summer of 1995, and is currently a Senior Policy Advisor for the Disabled and Elderly Health Programs Group (DEHPG). DEHPG administers the Medicaid benefit package, oversees the managed care service delivery infrastructure, and implements a myriad of policies advancing home and community-based services as an alternative to institutional placement.

Prior to her current position, she was the Acting Deputy Director for DEHPG in 2015. This was after her role as the Director of the Division of Benefits and Coverage from 2012 to 2014, in which she was responsible for overseeing implementation of most Medicaid benefits, including benefits provided to individuals in the Medicaid expansion population, and the establishment of national benefit policy.

KIMBERLY KNACKSTEDT is the Disability and Education Policy Advisor for the U.S. House of Representatives - Committee on Education and the Workforce minority staff under Ranking Member Bobby Scott (VA-03). She received her Bachelor of Education in Special Education and Elementary Education from Gonzaga University, Master of Education in Special Education with a focus on low-incidence disabilities from the University of Kansas, and PhD in special education policy from the University of Kansas. She taught special education for four years in Kansas City. Prior to working for the Committee on Education and the Workforce, Kimberly served on the Senate Committee on Health, Education, Labor, and Pensions as the Joseph P. Kennedy Jr. Public Policy Fellow in 2016 under Ranking Member, Senator Patty Murray.

JANE LAWRENCE is a Senior Consultant at Applied Self-Direction and is currently leading their work on Electronic Visit Verification (EVV). Throughout her career, she has focused on identifying ways to build inclusive communities that support people with disabilities to live full and meaningful lives. Jane has been a leader in providing training and technical assistance in person-centered planning to individuals, organizations, and government agencies. Her work as an independent consultant included agency and system re-design efforts, including HCBS providers and advocacy organizations. She was responsible for the development of Financial Management Services (FMS) within an organization, and was recognized as an important contributor to regional discussions on self-direction. She has a Bachelor of Arts degree in speech and theater arts from MacMurray College in Jacksonville, Illinois, and did graduate work in educational psychology at the University of Minnesota in Minneapolis.

MICHAEL GAMEL-McCORMICK is the Disability Policy Director for Senator Bob Casey of Pennsylvania working on health, education, employment, civil rights and justice, transportation, housing, and other issues related to federal disability policy. He was also the Disability Policy Director and senior education advisor for Senator Tom Harkin of Iowa. He is the former Associate Executive Director for Research and Policy at the Association of University Centers on Disabilities. He was a professor and dean at the University of Delaware for 17 years and the director of the Center for Disabilities Studies at the university for nine years. His areas of research were early intervention and early childhood education, family support, transition, and disability studies. Prior to his higher education and policy work, he was an early childhood teacher and early interventionist for 15 years in Wisconsin and Virginia.

MOLLIE MURPHY has nationally recognized expertise in financial management services (FMS) in self-direction. With more than 14 years of experience in FMS, Ms. Murphy has assisted state and federal agencies to design and implement self-direction programs with high performing and compliant FMS. Ms. Murphy has led FMS technical assistance at the National Resource Center for Participant-Directed
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Services and Applied Self-Direction since 2008 and has designed and carried out the only national FMS Conference since 2009. She has worked with states to develop FMS programs from their inception and to improve services and processes in existing FMS programs. Ms. Murphy serves on an interagency workgroup with the Internal Revenue Service to support tax policy development for FMS.

ELLEN NISSENBAUM is the Senior Vice President for Government Affairs for the Center on Budget and Policy Priorities. Since 1984, she has directed the center’s work with federal policymakers and with other national organizations on a broad range of policy issues. These include federal budget and tax issues (with a particular focus on refundable tax credits for low-income working families), Medicaid and health care, nutrition programs, and other critical policies. Regarded as one of the leading legislative directors among nonprofit organizations in Washington, Ellen assists a broad array of both national and state organizations and coalitions, providing information on key policy developments in Congress and the Executive Branch, strategic guidance, and communications planning for their work on key federal policies. She also gives speeches regularly at conferences and conducts briefings on an array of federal policy and legislative developments for policy makers and other organizations. Ellen is frequently sought out by journalists at prominent news outlets covering legislative and budget developments for analysis and commentary on congressional developments.

STUART PORTMAN serves as Health Policy Advisor for the majority staff of the U.S. Senate Committee on Finance. In this capacity, he handles issues related to Medicaid, CHIP, and ACA Exchanges. Previously, he served as the Senior Health Care Legislative Assistant and Legislative Correspondent for Senator Hatch. Stuart received his Master of Public Health degree specializing in health policy from the Milken Institute School of Public Health at The George Washington University. While there, his coursework focused on Medicaid and CHIP, as well as ethical debates within the health services community.

SARAH SALISBURY is a Senior Consultant with Public Consulting Group (PCG), based out of Albany, NY. Ms. Salisbury has over 12 years of extensive experience in a vast array of health and human services programs with specific focus on aging and disability services, early childhood programming, and cost reporting. In 2015-2016, she managed a project with the New York governor's office, exploring the possibility for a Universal Incident Management System through the development of business requirements, analysis of IT systems, and creation of an implementation roadmap with a focus on streamlining incident management practices, while improving data collection and quality. Other work Ms. Salisbury focused on related to PCG’s Aging and Disability Center of Excellence includes assisting states with implementation of their HCBS Statewide Transition Plan, conducting site assessments, and overseeing rate studies and fiscal analysis. In addition, Ms. Salisbury led a comprehensive transportation assessment in New York state in 2016, identifying transportation barriers for individuals with disabilities and proposed innovative recommendations for coordination and system transformation.

Prior to her work at PCG, Ms. Salisbury worked for the New York State Division of the Budget, managing health and human services budget and fiscal policy for programs including HEAP, SSI, SNAP, NY’s health exchange, and Early Intervention, and developed cost savings and revenue maximization recommendations for IT development projects and strategic sourcing. Her other past work has included serving as a subject matter expert for the federal Office of Refugee Resettlement, and public affairs at the U.S. Embassy in Guatemala. Ms. Salisbury has a Master of Public Administration from Rutgers University and a Bachelor of Arts from Nyack College, as well as a Certificate in Management Development from Cornell University.
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**TERESA SLOAN** currently serves as the Assistant Commissioner and General Counsel for the Tennessee Department of Intellectual and Developmental Disabilities (DIDD). In her role, she has oversight of the department’s nationally recognized Protection from Harm system, which includes Investigations and Incident Management for the state’s home and community-based waiver services for people with intellectual disabilities.

Ms. Sloan’s legal background includes work in both Medicaid Long Term Services and Supports (LTSS) and behavioral health. She started her career with the state of Tennessee at the Division of TennCare as an assistant general counsel and then worked in the same role at the Department of Mental Health and Developmental Disabilities. She joined DIDD in 2010.

Ms. Sloan received her Juris Doctor from Suffolk University Law School. She currently lives in Hendersonville, Tennessee with her husband and three children.

**KIM STOCK** began her tenure with the Missouri Department of Mental Health in March 1996. Since March of 2012, she has been in the role of Director of Quality Assurance. Prior to that, she worked as a quality specialist, registered nurse and case manager in the field of developmental disabilities.

Kim’s previous experience also includes working in the field of mental health nursing in both in-patient and community-based settings.

**MEGAN TINKER** is Senior Advisor for Legal Affairs for the Office of Counsel to the Inspector General, U.S. Department of Health and Human Services. She advises the OIG on jurisdiction and oversight issues under the IG Act, and health care fraud and compliance matters, including Medicaid, Medicare and grant programs. Ms. Tinker is responsible for executive level direction and oversight on highly complex and sensitive matters for which the Office of Counsel provides legal advice and representation to OIG officials. This includes a wide range of issues dealing with fraud, waste, and abuse in HHS programs and grants.

Ms. Tinker has testified before Congress, and spoken to the Health Care Compliance Association, Association of Government Accountants, Association of Healthcare Internal Auditors, and American Health Lawyers Association. Ms. Tinker provides training on multiple topics including OIG jurisdiction and authorities. Ms. Tinker is also a guest lecturer at the American University, Washington College of Law, Health Law Program. Ms. Tinker graduated cum laude from American University, Washington College of Law and with honors from University of Richmond.

**SOPHIE TRAINOR,** RD, serves as a Senior Policy Advisor for Congressman Brett Guthrie of Kentucky, where her focus is on healthcare policies under the jurisdiction of the House Energy and Commerce health subcommittee, which include the FDA and NIH, Medicare, Medicaid, and the opioid epidemic.

Prior to joining Congressman Guthrie’s team, Sophie served as a shared staffer for Congressman Joe Barton and the Energy and Commerce Committee, where she spearheaded efforts to combat the Zika virus and negotiated key parts of the 21st Century Cures Act and the Comprehensive Addiction and Recovery Act. Previously, Sophie served as a legislative assistant focusing on health, education, and labor appropriations for Congressman Martha Roby of Alabama and Congressman Lee Terry of Nebraska. Sophie began her career on the Hill as a legislative correspondent and staff assistant for Senator Jeff Sessions of Alabama.
Sophie earned a Bachelor of Science in Human Environmental Sciences from the University of Alabama. Sophie served as President of the University of Alabama Alumni Association, National Capital Chapter, and is a member of the Junior League of Washington. Originally from Memphis, Tennessee, Sophie currently resides in Washington, D.C.

RODNEY WHITLOCK is a veteran health care policy professional with more than 20 years of experience working with the US Congress, where he served as health policy advisor and as Acting Health Policy Director for Finance Committee Chairman Chuck Grassley of Iowa and, earlier, on the staff of former US Representative Charlie Norwood of Georgia.

During his years with Representative Norwood, Rodney managed the Patients' Bill of Rights, which passed the House in 1999 and 2001. In February 2005, Rodney left the office of Congressman Norwood to join the Finance Committee Staff as a health policy advisor to Chairman Grassley. In that capacity, he was lead Senate staffer for the Medicaid provisions of the Deficit Reduction Act of 2005 and the Tax Relief and Health Care Act of 2006.

In 2007, Rodney worked on the Children's Health Insurance Program Reauthorization Act, which passed Congress twice and was subsequently vetoed twice by President George W. Bush. Rodney spent 2009 and 2010 deeply engaged in health care reform legislation. Late in 2010, he became the Acting Health Policy Director for Senator Grassley, and shepherded the Medicare and Medicaid Extenders Act of 2010 into law. Following his tenure in Senator Grassley's Congressional office, Rodney served as Health Policy Director in the Senator's personal office.

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