

NASDDDS  
2009 Annual Conference  
Alexandria, Virginia

*Changing the Rules of the Game*

**RULEBOOK**

PROGRAMS AT A GLANCE

SESSIONS AT A GLANCE

PROGRAM

BIOS

NASDDDS  
2009 Annual Conference

**PROGRAM**



November 9-11, 2009



Hotel Monaco  
Alexandria, Virginia

# List of EXHIBITORS

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A Special Thank You to our Exhibitors!  
Please Visit Them in the Athens & Bombay Rooms

Acumen Fiscal Agent LLC

APS Healthcare

Arbitre Consulting, Inc.

CARF International

Commission on Accreditation of Rehabilitation Facilities

College of Direct Support

Community Ties of America, Inc.

Consumer Direct Personal Care

Deloitte Consulting

Essential Learning

Foothold Technology

Harmony Information Systems, Inc.

Labor Relations Alternatives, Inc. (LRA)

NAFAI

National Association of Fiscal Agents and Intermediaries

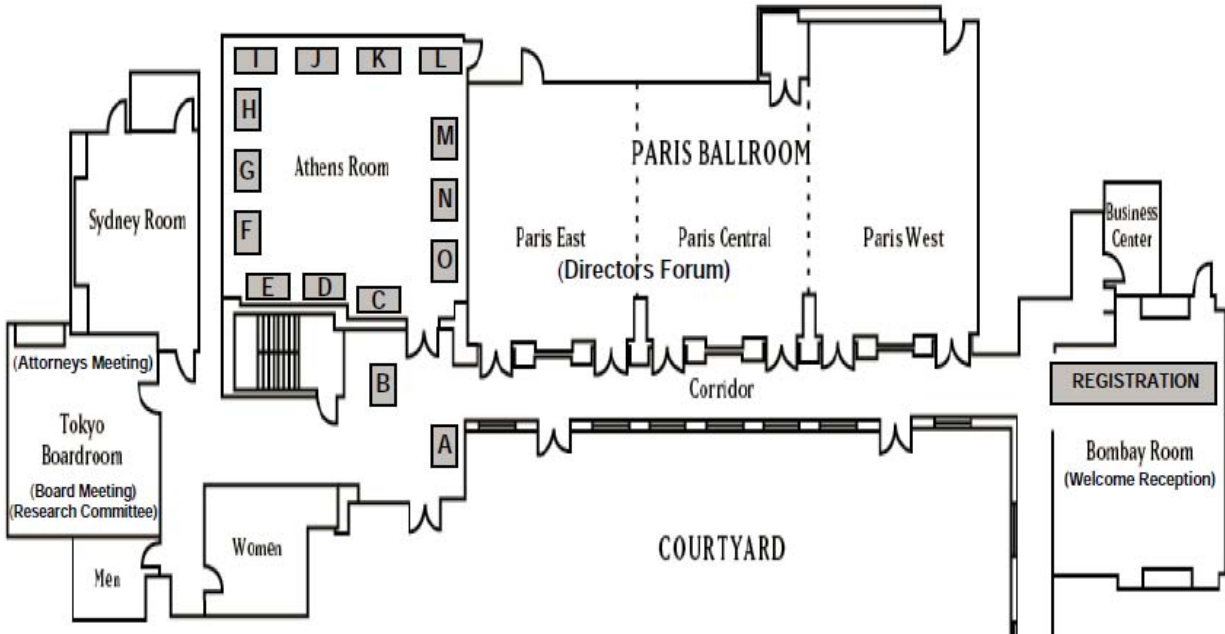
PrecisionCare Software

Rest Assured LLC

Scioto

Therap Services LLC

**Hotel Monaco FLOOR PLAN**



**EXHIBITOR LOCATIONS**

College of Direct Support.....	A	Consumer Direct .....	I
Deloitte Consulting .....	B	Scioto .....	J
APS Healthcare.....	C	Therap Services .....	K
NAFAI.....	D	Arbitre Consulting, Inc.....	L
Harmony Information Systems.....	E	Essential Learning.....	M
Rest Assured.....	F	CARF.....	N
Precision Care.....	G	Foothold Technology.....	O
Labor Relations Alternatives .....	H	Acumen Fiscal Agent LLC .....	Bombay Room

**CONFERENCE ACTIVITIES**

<b>ROOM</b>	<b>FUNCTION</b>
Athens Room .....	Continental Breakfast, Coffee/Tea Breaks, and Exhibits
Athens Room Corridor.....	Monday Registration and Exhibits
Bombay Room .....	Monday Reception, Tuesday/Wednesday Registration, and Exhibits
Paris East & Central .....	Monday Directors Forum
Paris Central & West .....	All Plenary Sessions
Tokyo Boardroom.....	Monday Attorneys Meeting
Tokyo Boardroom.....	Board Meeting and Research Committee Meeting



**NASDDDS**  
**2009 Annual Conference**  
**PROGRAM at a Glance**

**Monday, November 9**

8:00 AM – 9:00 AM	Continental Breakfast .....	Athens Room
8:00 AM – 7:00 PM	REGISTRATION .....	Athens Room Corridor
9:00 AM – 12:00 PM	Directors Forum* .....	Paris East & Central
	<i>*Open to state DD directors, proxy, and/or designated staff ONLY</i>	
9:00 AM – 12:00 PM	Attorneys Meeting* .....	Tokyo Boardroom
	<i>*Open to state DD attorneys ONLY</i>	
10:30 AM – 10:45 AM	Coffee/Tea Break .....	Athens Room
12:00 PM – 1:30 PM	Lunch/Discussion (State DD Directors & Attorneys).....	Athens Room
1:30 PM – 2:00 PM	Break .....	
2:00 PM – 3:00 PM	Directors Forum <i>continues</i> .....	Paris East & Central
	<i>Open to state DD directors, proxy, and/or designated staff ONLY</i>	
2:00 PM – 4:30 PM	Attorneys Meeting <i>continues*</i> .....	Tokyo Boardroom
	<i>*Open to state DD attorneys ONLY</i>	
3:00 PM – 3:15 PM	Coffee/Tea Break .....	Athens Room
3:15 PM – 5:00 PM	Annual Business Meeting* .....	Paris East & Central
	<i>*Open to state DD directors, proxy, and/or designated staff ONLY</i>	
5:30 PM – 7:00 PM	Welcome Reception .....	Bombay Room

**Tuesday, November 10**

8:00 AM – 9:00 AM	Continental Breakfast .....	Athens Room
8:00 AM – 5:30 PM	REGISTRATION .....	Bombay Room
8:00 AM – 5:30 PM	Exhibits.....	Athens Room, Corridor & Bombay Room
9:00 AM – 10:30 AM	Welcome, Introduction, and Keynote Address I.....	Paris Central & West
10:30 AM – 10:45 AM	Coffee/Tea Break .....	Athens Room
10:45 AM – 12:00 PM	Keynote Address II .....	Paris Central & West
12:00 PM – 1:00 PM	Award Luncheon .....	Paris Central & West
1:15 PM – 2:45 PM	Plenary Session .....	Paris Central & West
2:45 PM – 3:00 PM	Coffee/Tea Break .....	Athens Room
3:00 PM – 5:30 PM	Plenary Session .....	Paris Central & West

**Wednesday, November 11**

7:30 AM – 9:00 AM	Continental Breakfast .....	Athens Room
7:30 AM – 12:00 PM	REGISTRATION .....	Bombay Room
7:30 AM – 12:00 PM	Exhibits.....	Athens Room, Corridor & Bombay Room
8:00 AM – 9:00 AM	Special Session: Pandemic Flu Preparation.....	Paris Central & West
9:00 AM – 10:30 AM	Plenary Session .....	Paris Central & West
10:30 AM – 10:45 AM	Coffee/Tea Break .....	Athens Room
10:45 AM – 12:00 PM	Plenary Session .....	Paris Central & West

# SESSIONS at a Glance

## Monday, November 9

<b>Directors Forum</b>	<b>Paris East &amp; Central</b>
9:00 AM – 3:00 PM	The Directors Forum is open to state DD directors, proxy, and/or designated staff ONLY.
<b>Attorneys Meeting</b>	<b>Tokyo Boardroom</b>
9:00 AM – 4:30 PM	The Attorneys Meeting is open to state DD attorneys ONLY.
<b>Annual Business Meeting</b>	<b>Paris East &amp; Central</b>
3:15 PM – 5:00 PM	The Annual Business Meeting is open to state DD directors, proxy, and/or designated staff ONLY.
<b>Welcome Reception</b>	<b>Bombay Room</b>
5:30 PM – 7:00 PM	The Welcome Reception is open to all conference attendees and offers a great opportunity to meet others and network. Complimentary hors d'oeuvres. Cash bar.

Please  
Manage Your Technology Responsibly  
and  
Not Intrude  
On Your  
Neighbor  
and  
Others at the Conference





**NASDDDS**  
**2009 Annual Conference**  
**SESSIONS at a Glance**

**Tuesday, November 10**

<b>Opening Plenary</b>	<b>Paris Central &amp; West</b>
9:00 AM – 10:30 AM	Welcome Kenneth Ritchey (NJ), Board President Introduction Nancy Thaler NASDDDS Executive Director Keynote Address I Scott Pattison, Executive Director NASBO
<b>Plenary Session</b>	<b>Paris Central &amp; West</b>
10:45 AM – 12:00 PM	Introduction Jane Gallivan (ME), Board Member Keynote Address II Theresa Pratt, CMS/CMSO/DEHPG Henry Claypool, HHS/Office on Disability
<b>AWARD Luncheon</b>	<b>Paris Central &amp; West</b>
12:00 PM – 1:00 PM	The NASDDDS Board of Directors will honor <b>Valerie J. Bradley</b> with the Robert M. Gettings Compass Award and also recognize <b>Stanley Butkus, PhD</b> , for his previous service as President of the Board.
<b>Plenary Session</b>	<b>Paris Central &amp; West</b>
1:15 PM – 2:45 PM	Introduction Mary Lee Fay (OR), Board Member <b>Why Person-Centered Practices</b> Michael Smull and Mary Lou Bourne Laura Doutre (TN) and Scott Pelham (SD)
<b>Plenary Session</b>	<b>Paris Central &amp; West</b>
3:00 PM – 5:30 PM	Introduction Steve Hall (KY), Board Member Plenary Addresses Celia Feinstein and Kevin Casey (PA) John Martin (Ohio)



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**SESSIONS at a Glance**

**Wednesday, November 11**

<b>Special Session</b>	<b>Paris Central &amp; West</b>
<b>8:00 AM – 9:00 AM</b>	Pandemic Flu Update by Chas Moseley, Associate Executive Director, NASDDDS and Dr. Mark E. Swanson, Senior Medical Adviser, Lead Subject Matter Expert for Disability Team, Centers for Disease Control and Prevention (CDC)
<b>Plenary Session</b>	<b>Paris West &amp; Central</b>
<b>9:00 AM – 12:00 PM</b>	<p>Introduction Peter Bisbecos, Board Member</p> <p>Plenary Addresses Jon Fortune (HSRI)          Kathy Kliebert (LA)          Lee Price (VA)          Bob Clabby (OR)</p>

**~ SPECIAL SESSION ~**  
 Wednesday, November 11  
**8:00 AM – 9:00 AM**  
  
**Responding to the H1N1 Influenza Pandemic:  
 Issues and Concerns for State Agency Directors**  
  
**Mark E. Swanson, MD, MPH**  
 Senior Medical Adviser  
 Lead Subject Matter Expert for Disability Team  
 Centers for Disease Control and Prevention (CDC)  
  
**Charles Moseley, EdD**  
 Associate Executive Director  
 NASDDDS



**NASDDDS**  
**2009 Annual Conference**  
**PROGRAM: Monday, November 9, 2009**

- Continental Breakfast** .....8:00 AM – 9:00 AM  
 LOCATION: Athens Room
- Registration** .....8:00 AM – 7:00 PM  
 LOCATION: Athens Corridor
- Directors Forum** ..... 9:00 AM – 10:30 AM PM  
 LOCATION: Paris East & Central  
*Open to state DD directors, proxy, and/or designated staff ONLY*
- State DD Attorneys Meeting** .....9:00 AM – 10:30 AM  
 LOCATION: Tokyo Boardroom  
*Open to state DD attorneys ONLY*
- Coffee/Tea Break** ..... 10:30 AM – 10:45 AM  
 LOCATION: Athens Room
- Directors Forum continues** ..... 10:45 AM – 12:00 PM  
 LOCATION: Paris East & Central
- State DD Attorneys Meeting continues** ..... 10:45 AM – 12:00 PM  
 LOCATION: Tokyo Boardroom
- Lunch and Discussion (DD Directors & State DD Attorneys)** ..... 12:00 PM – 1:30 PM  
 LOCATION: Athens Room
- Directors Forum continues** ..... 2:00 PM – 3:00 PM  
 LOCATION: Paris East & Central
- State DD Attorneys Meeting continues** ..... 2:00 PM – 3:00 PM  
 LOCATION: Tokyo Boardroom
- Coffee/Tea Break** ..... 3:00 PM – 3:15 PM  
 LOCATION: Athens Room
- Annual Business Meeting** ..... 3:15 PM – 5:00 PM  
 LOCATION: Paris East & Central  
*Open to state DD directors, proxy, and/or designated staff ONLY*
- State DD Attorneys Meeting continues** ..... 3:15 PM – 4:30 PM  
 LOCATION: Tokyo Boardroom
- Welcome Reception** ..... 5:30 PM – 7:00 PM  
 LOCATION: Bombay Room

The Welcome Reception is open to all conference attendees and offers a great opportunity to meet people and network. Cash bar. Complimentary hors d'oeuvres.



**PROGRAM: Tuesday, November 10, 2009**

**Continental Breakfast** .....8:00 AM – 9:00 AM  
LOCATION: Athens Room

**Registration** .....8:00 AM – 5:30 PM  
LOCATION: Bombay Room

**Exhibitors** .....8:00 AM – 5:30 PM  
LOCATION: Athens Room, Corridor & Bombay Room

**Plenary Session** .....9:00 AM – 10:30 AM  
LOCATION: Paris Central & West

**Welcome**

**Kenneth W. Ritchey**

Assistant Commissioner, New Jersey Division of Developmental Disabilities and  
President, NASDDDS Board of Directors

**Introduction and Moderator**

**Nancy Thaler**

Executive Director, NASDDDS

**Keynote Address I**

**“State Budgets: What We’ll be Facing in the Next Ten Years”**

**Scott Pattison**

Executive Director  
National Association of State Budget Officers

Mr. Pattison will provide an overview and prediction of what we should expect for state budgets in the next 10 years and how to best manage budgets and budget cuts by using data.

**Coffee/Tea Break** .....10:30 AM – 10:45 AM  
LOCATION: Athens Room



**PROGRAM: Tuesday, November 10, 2009**

**Plenary Session** *continues* ..... 10:45 AM – 12:00 PM  
LOCATION: Paris Central & West

**Introduction and Moderator**

**Jane J. Gallivan**

Director, Maine Office of Adults with Cognitive & Physical Disability Services and  
Member-at-Large of NASDDDS Board of Directors

**Keynote Address II**

**Terry Pratt**

Acting Director  
Disabled and Elderly Health Program Group  
Center for Medicaid and State Operations CMS

Ms. Pratt is responsible for Home and Community Based Waivers and State Plan services that support individuals in their homes and community.

**Henry Claypool**

Director  
Office on Disability  
Department of Health and Human Services

As Director of the Office on Disability, Mr. Claypool serves as the primary advisor to the HHS Secretary on disability policy and oversees the implementation of all HHS programs and initiatives pertaining to Americans with disabilities.

**Award Luncheon** ..... 12:00 PM – 1:00 PM  
LOCATION: Paris Central & West

The NASDDDS Board of Directors will honor **Valerie J. Bradley**, President, Human Services Research Institute with the Robert M. Gettings Compass Award for her contributions to individuals and state systems serving citizens with intellectual and other developmental disabilities. The NASDDDS Board of Directors will also recognize **Stanley Butkus, PhD**, for his previous service as President of the Board.

**Break** ..... 1:00 PM – 1:15 PM



**Plenary Session** ..... 1:15 PM – 2:45 PM  
LOCATION: Paris Central & West

**Introductions and Moderator**

**Mary Lee Fay**

Administrator, Oregon Seniors & People with Disabilities and  
Vice President/President Elect of the NASDDDS Board of Directors

**“Why Person-Centered Practices:  
System Transformation – the Benefits and the Challenges”**

**Michael Smull**

Partner  
Support Development Associates, LLC

**Mary Lou Bourne**

Partner  
Support Development Associates, LLC

**Laura Doutre**

Director of Person Centered Practices  
Tennessee Division of Intellectual Disabilities Services

**Scott C. Pelham**

Director  
South Dakota DHS/Division of Developmental Disabilities

Developing a person-centered system offers clear benefits for the people who use the services. This session looks at the efforts required for successful transformation with an emphasis on the role of and requirements of state leadership. Learning from a six-state consortium will be presented. Details from two ways to approach the challenges will be presented by representatives from Tennessee (a depth effort) and South Dakota (a breadth effort) and their experiences with evident benefits of incorporating person-centered practices.

**Coffee/Tea Break** ..... 2:45 PM – 3:00 PM



**Plenary Session: Game Changers in Pennsylvania & Ohio .....3:00 PM – 5:30 PM**  
LOCATION: Paris Central & West

**Introductions and Moderator**

**Stephen R. Hall, PhD**  
Commissioner,  
Kentucky Behavioral Health, Developmental and Intellectual Disabilities and  
Member-at-Large of NASDDDS Board of Directors

**“Knowledge is Power in Choosing Supports: Provider Profiles”**

**Celia S. Feinstein**  
Associate Director  
Institute on Disabilities - Temple University (Philadelphia, Pennsylvania)

**Kevin Casey**  
Deputy Secretary  
Pennsylvania DPW - Office of Developmental Programs

This presentation will describe the process that is taking place in Pennsylvania to provide information at the provider and administrative entity (county) levels, to assist people with disabilities and families in choosing who will provide supports to them. Data emanate from a variety of places including Independent Monitoring for Quality which includes the National Core Indicators data. Provider profiles may also be utilized as one part of the state’s responsibility to monitor providers under the waiver.

**“Ohio’s Multi-Dimensional Approach Toward a Positive Culture”**

**John Martin**  
Director  
Ohio Department of Developmental Disabilities

Ohio’s Department of Developmental Disabilities led a statewide effort toward banning the use of prone restraint, and limited use of restraints in general, across all of Ohio’s systems. Having persons representing prisons, state police, education, mental health and others, and using the language of the state's Positive Culture Initiative, was a unique experience offering opportunities to effect real change. A key effort in the State of Ohio was instilling ownership of the effort at the local level, rather than directed by the state, opening the door to a grassroots culture change.

**Adjourn for the Day ..... 5:30 PM**



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**Continental Breakfast** .....7:30 AM – 9:00 AM  
LOCATION: Athens Room

**Registration** .....7:30 AM – 12:00 PM  
LOCATION: Bombay Room

**Exhibits** .....7:30 AM – 12:00 PM  
LOCATION: Athens Room, Corridor & Bombay Room

**Special Session** .....8:00 AM – 9:00 AM  
LOCATION: Paris Central & West

**“Responding to the H1N1 Influenza Pandemic:  
Issues and Concerns for State Agency Directors”**

**Charles Moseley, EdD**  
Associate Executive Director  
NASDDDS

**Mark E. Swanson, MD, MPH**  
Senior Medical Adviser  
Lead Subject Matter Expert for Disability Team  
Centers for Disease Control and Prevention (CDC)  
Atlanta, Georgia

The widening spread of the Novel H1N1 influenza outbreak is raising concerns among NASDDDS member state agency officials with responsibility for assuring the delivery of supports for people with intellectual and developmental disabilities.

Chas Moseley will provide an update on efforts the Association is taking to ensure NASDDDS members are kept informed on key topics related to the spread of the influenza virus, the vaccination of individuals receiving services, staff and families, the administration of Medicaid services, and other issues.

Dr. Swanson will inform Association members on the current status of the influenza pandemic and the CDC’s efforts to respond to and address the needs of individuals with intellectual and developmental disabilities during this nationwide health crisis.



**Plenary Session** .....9:00 AM – 10:30 AM  
LOCATION: Paris Central & West

**Introduction and Moderator**

**Peter A. Bisbecos**

Director, Indiana FSSA - Disability & Rehabilitative Services  
Member-at-Large of NASDDDS Board of Directors

**“A Clinic on the Ten Issues for States to Consider in Implementing Individual or Level-Based Budget Allocations”**

**Jon Fortune**

Senior Policy Analyst  
Human Service Research Institute (HSRI)

This is a clinic for policymakers who increasingly seek to restructure state resource allocation practices for individuals with developmental disabilities. They are doing so in response to various pressures, like increasing service demand, budget shortfalls, and a reliance on legacy systems, but are also seeking to achieve greater system efficiency and equity. Presented in conjunction with three states that have made significant progress in these areas, this clinic will cover the major 10 issues facing states. What is the big picture? What have we learned from all the states? What do states have to think about if they go down this path?

**Coffee/Tea Break** .....10:30 AM – 10:45 AM  
LOCATION: Athens Room

**Plenary Session continues** .....10:45 AM – 12:00 PM  
LOCATION: Paris Central & West

**“Changing the Way We Manage Money”**

**Kathy H. Kliebert**

Assistant Secretary  
Louisiana Office for Citizens with Developmental Disabilities

Ms. Kliebert will describe the basic framework and steps that must be considered when moving toward individualizing resources. She will give an overview of



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Louisiana’s journey in this process and detail some of the various technical, programmatic, and policy decisions that were made along the way. She will also describe some of the things learned in developing the model they are using and some of their initial experiences with implementation of the model.

**C. Lee Price, MS**

Director, Office of Developmental Services  
Virginia Department of Behavioral Health and Developmental Services

Mr. Price will provide a review of how the Supports Intensity Scale has been used in Virginia to support person-centered thinking and establish a common means of establishing levels of support needed.

**Bob Clabby**

Director, ReBAR Program  
Oregon Office of Developmental Disabilities Services

Oregon is one of the states referenced by the Human Services Research Institute (HSRI) that has been implementing a level-based budget allocation based on the SIS over the past year. This presentation will provide more detailed information regarding Oregon’s planning, development, implementation and rollout strategies. Bob Clabby will also discuss what has worked well, and what has been a challenge “when the rubber meets the road.”

**Meeting Concludes** ..... 12:00 PM

## Keynote Speakers

**Cindy Mann, JD**, serves as Director of the Center for Medicaid and State Operations (CMSO), part of the Federal Centers for Medicare & Medicaid Services (CMS). Mann most recently worked as a research professor and executive director of the Center for Children and Families at Georgetown University's Health Policy Institute. Her work focuses on health coverage, financing, and access issues affecting low-income populations. She has written extensively on these issues and how they relate to Medicaid and Children's Health Insurance Program (CHIP); in particular – and has worked closely with state and federal policymakers and program administrators on the design and implementation of Medicaid and CHIP. From 1999-2001, Ms. Mann was the director of the Family and Children's Health Program Group at the Health Care Financing Administration (HCFA), now CMS. In that capacity, she directed, at the federal level, the implementation and oversight of the Medicaid program with respect to families, children, and pregnant women, and oversaw the implementation of CHIP. Prior to her work at HCFA, Ms. Mann led the Center on Budget and Policy Priorities' federal and state health policy work. She also has extensive state-level experience, having worked on health care, welfare, and public finance issues in Massachusetts, Rhode Island, and New York. She holds a law degree from New York University School of Law.

**Scott Pattison** is the Executive Director of the National Association of State Budget Officers (NASBO) in Washington, D.C. Founded in 1945, NASBO serves as the professional organization for all state budget officers of the 50 states and U.S. territories. NASBO collects data and publishes numerous reports on state fiscal conditions. The association also provides training for members and provides public officials, the media, and citizens information on state financial management and budgeting. Prior to coming to NASBO, Pattison worked as Virginia's state budget director and, before that, as state budget officer. He also headed the Regulatory and Economic Analysis section of the Virginia Department of Planning and Budget and served in a variety of capacities in the office of the Virginia Attorney General, including as Counsel. Pattison began his career with the federal government serving in several positions at the U.S. Federal Trade Commission (FTC) in Washington, D.C., including as an attorney-advisor. He also briefly ran a small nonprofit focusing on consumer protection issues.

**Theresa (Terry) Pratt** serves as Acting Director for the Disabled and Elderly Health Programs Group, Center for Medicaid and State Operations, CMS. Prior to her work with the Federal Centers for Medicare and Medicaid Services (CMS), Ms. Pratt began her federal career with the Social Security Administration in 1978, and since that time has been devoted to working with programs that serve our nation's most vulnerable

populations. She started working at CMS in 1989 and has extensive experience with long-term policy and program areas such as hospice, home- and community-based care, managed care, mental health, 1115 demonstrations, the Program of All inclusive Care for the Elderly (PACE), self-direction, and Medicaid State Plan Amendments.

### **Plenary Speakers**

**Mary Lou Bourne** has worked in the field of developmental disabilities for 21 years. As a certified Mentor Trainer in person-centered practices, she has supported new person-centered thinking trainers, and facilitators of person-centered practices. As Executive Director of a home-based provider agency, she has learned to listen to families to understand the unique challenges faced by each. More recently, Ms. Bourne has spent several years working to implement significant system change through work with several state systems and a Real Choice Systems Change Grant through CMS. With a strong interest in designing performance excellence into large systems, she has been an Examiner with the Malcolm Baldrige National Quality Program for the past three years.

**Kevin Casey** has been serving as Deputy Secretary for Pennsylvania's Office of Developmental Programs for the last six years. Prior to this appointment, he was the director of Pennsylvania Protection and Advocacy, and has over 30 years of experience in advocacy and services for people with disabilities. Last fiscal year, Kevin was successful in obtaining funds for new everyday living options, like life-sharing for over 750 individuals. Additional expansion is being planned for this fiscal year as well.

**Bob Clabby** has been serving as the Director of Oregon's ReBAR (Restructuring Budgets, Assessments and Rates) Project since its inception in 2005. He is also primary author/director for associated CMS Systems Transformation Grant. Under overall leadership of state DD director Mary Lee Fay, he is responsible for developing new models, implementing strategies, and operating the new statewide SIS assessment unit. He currently holds the somewhat unique position of not only developing and implementing new rate & assessment systems for the state, but also being responsible to oversee a county-based service network which operates on the "receiving end" of those new processes. He previously worked as Wyoming's state DD director, where he oversaw the development and implementation of the DOORS IBA system. He also assisted in downsizing/closing institutions in three states. Mr. Clabby previously served as member-at-large for NASDDDS' Board of Directors.

**Laura Doutre** started working in this field in 1992, beginning with an organization that provides residential and day supports to people. She served in several positions from

direct support staff to case manager to program director while working in the Buffalo River Services, Inc. agency. Her career as a state employee began in 1998 as a Quality Assurance Surveyor. She started working as Director of Operations for the State of Tennessee and became involved in the “Becoming a Person Centered Organization” project in 2008. She then became a credentialed Person Centered Thinking Trainer through the Learning Community for Person Centered Practices earlier in 2009.

**Celia Feinstein** is the Associate Director of the Institute on Disabilities at Temple University, Pennsylvania’s University Center for Excellence in Developmental Disabilities. Ms. Feinstein was one of the originators of Independent Monitoring for Quality, which is Pennsylvania’s expanded version of the National Core Indicators Project.

**Dr. Jon Fortune** joined the Human Service Research Institute (HSRI) in 2006 and has solid research skills as well as hands-on experience as a state administrator. He has 33 years of experience and was the chief architect of the precedent-setting Wyoming DOORS model through which people with disabilities were assigned individual budgets based on their assessed needs and other factors. Jon has worked on all of HSRI’s resource allocation Sage Resources projects in 10 states and two provinces.

**Kathy H. Kliebert** has a Master’s degree in Social Work and 21 years of experience in the field of developmental disabilities. As Assistant Secretary for the Office of Citizens with Developmental Disabilities, she serves as director of all developmental disabilities supports and services for the State of Louisiana. Ms. Kliebert directs the development and accomplishment of short- and long-range plans for program development and operation along with policies and procedures that will result in the delivery of services consistent with the office’s mission and vision. She has been involved from inception to implementation of individual resource allocation in Louisiana.

**John Martin** has been serving as Director of the Ohio Department of Developmental Disabilities since 2007. He directed a community-based, nonprofit organization for 22 years that provides a variety of residential and community services for Ohioans with disabilities. His work experience includes: special education teacher, house parent in a group home for individuals who are dually diagnosed, direct care worker in an agency serving medically complex children, cottage psychologist in an institution for the dually diagnosed, and director of residential services for an agency operating under the Penn Hurst order in Pennsylvania. He is a parent of three children, including one with significant developmental disabilities. Mr. Martin holds a BA in Special Education from Illinois State Normal University and an MA in Community Psychology from Temple University.

**Charles Moseley, EdD.** Chas is the Associate Executive Director of the National Association of State Directors of Developmental Disabilities Services (NASDDDS). In this role, he manages national projects and research, performs state and federal policy analysis, and provides technical assistance to states on Medicaid, self-determination, systems change, individual budgeting and a variety of other areas. Before coming to the Association, Dr. Moseley was the Co-Director of the National Program Office on Self-Determination, a project of the Robert Wood Johnson Foundation at the University of New Hampshire Institute on Disability. Prior to that position, he was the Director of Vermont's Division of Developmental Services where he led the initiative to close the state's institution, transition all services to individualized community-based alternatives, and restructure service delivery to incorporate principles of self-directed services. He holds a doctorate from Syracuse University.

**Scott Pelham** is the Director of South Dakota's Division of Developmental Disabilities. Prior to becoming director, he played a major role in assisting the Division in implementing its Consumer Empowerment System software that assists the Family Support program to become a self-administered system and allows participants more freedom and choice of hiring, firing, and managing their caregivers and providers. Mr. Pelham worked very closely with South Dakota's Community Support Providers in implementing the system before he moved to the state to become the Division's director. He previously served as executive director of a provider agency; executive director of a statewide association representing providers in the state of Washington; and program manager/legislative coordinator/community liaison for Washington's Division of Developmental Disabilities, along with numerous other positions in the private industry.

**C. Lee Price.** Since joining the Department of Behavioral Health and Developmental Services (DBHDS) in 2004, Mr. Price and the team of staff in the Office of Developmental Services have led, along with their partners, an initiative to incorporate person-centered thinking into the Medicaid funded practices and services in Virginia. The implementation of the Supports Intensity Scale as a universally administered assessment across all Medicaid-funded services for persons with intellectual disabilities is one of the key elements of this process.

**Michael Smull** has been working with people with disabilities for the past 36 years. He has had extensive experience in nearly all aspects of developing community services and in changing current practice. Mr. Smull is the Chair of The Learning Community for Person Centered Practices (TLC-PCP), and a partner in Support Development Associates (SDA). He is the co-developer of essential lifestyle planning and has worked in 47 states, Canada, the UK, Australia, and Belgium. He has helped found three community agencies, assisted existing agencies to convert from programs to

supports, and states, regions, and counties to change their structures to support self-determination. He has helped people leave institutions in the US and the UK. Mr. Smull has written extensively on issues relating to supporting people with challenging behaviors, person-centered planning, and the challenge of changing our system to one that will support self-determination. From 1982 through 1997 he was at the University of Maryland. When he left he was a Research Assistant Professor with the Department of Counseling and Personnel Services at the College Park Campus and a Clinical Assistant Professor with the Department of Pediatrics, at the University of Maryland School of Medicine. Mr. Smull works with agencies, regions and states on learning the skills that underlie good person-centered plans and making the changes needed within organizations and systems to implement those plans. He is the recipient of the 2006 AAIDD service award. Michael Smull and Mary Lou Bourne are the co-designers of efforts to develop person-centered systems. This work is taking place in over 40 agencies and six states. He lives in Annapolis, MD with his wife and five dogs.

**Mark E. Swanson, MD, MPH**, serves as Senior Medical Adviser, Lead Subject Matter Expert for the Disability Team at the Centers for Disease Control and Prevention (CDC) in Atlanta, Georgia. He was the first Director of Partners for Inclusive Communities at Arkansas' University Center on Disabilities and oversaw its growth from 1990 to 2005 before coming to CDC. For three years, he directed a multi-faceted program that included state-level health promotion programs for persons with disabilities, extramural research projects, the National Spina Bifida Program, information resource centers addressing physical activity, intellectual disability, paralysis and limb loss; and an intramural research program focusing on health disparities in persons with disabilities. Dr. Swanson is a graduate of Princeton University, the University of Colorado, School of Medicine, and the University of North Carolina School of Public Health. He is board-certified in Pediatrics and Developmental-Behavioral Pediatrics with 30 years of experience in program development, clinical services, research, and training in community and university settings.