



Health Management Associates, Inc.  
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Okemos, MI 48864

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HealthManagement.com

## Proposal to Provide Senior Citizens Needs Assessment Survey

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Presented to  
**Jefferson Parish**

Technical Proposal  
SOQ 24-033

October 25, 2024



# HEALTH MANAGEMENT ASSOCIATES

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October 25, 2024

Doris Abraham  
Purchasing Specialist II  
Jefferson Parish Purchasing Department  
General Government Building  
200 Derbigny St., Suite 4400  
Gretna, LA 70053

Dear Ms. Abraham:

Health Management Associates, Inc. (HMA) is pleased to submit our proposal to Jefferson Parish to provide a **Senior Citizens Needs Assessment Survey** in response to **SOQ 24-033**.

HMA has extensive experience developing and executing needs assessments and focusing on projects with aging populations. HMA is uniquely positioned to support Jefferson Parish with its needs assessment effort by drawing on our experience working in various aspects of healthcare in the Southeast Louisiana region and our knowledge of county services, human services, aging adult needs and services, and research methodologies. For example, one of our proposed team members is a licensed therapist who has also led strategic planning processes for community and healthcare programs and has significant experience supporting agencies to develop approaches to family and constituent engagement. She also has 24 years of experience teaching higher education courses that include a focus on aging.

Please contact our proposals director, Ann Filiault, at [proposals@healthmanagement.com](mailto:proposals@healthmanagement.com) or 518-801-0003 if you have any questions regarding this response. For contracting matters, please contact our contracts director, Jeff DeVries, at [contracts@healthmanagement.com](mailto:contracts@healthmanagement.com) or 517-482-9236. As chief administrative officer, I am authorized to bind HMA contractually with this bid.

We are excited about the prospect of working with Jefferson Parish and are confident HMA will provide exemplary service on this project. Thank you for the opportunity to bid on this very important work. We look forward to your decision.

Sincerely,



Kelly Johnson  
Chief Administrative Officer

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## Statement of Qualifications

### General Professional Services Questionnaire

<b>A. Project Name and Advertisement Resolution Number:</b>  Statement of Qualifications for Jefferson Parish to perform a Senior Citizens Needs Assessment, Resolution No.144736 (SOQ 24-033)
<b>B. Firm Name &amp; Address:</b>  <b>Local/Principal Office:</b> Health Management Associates, Inc. 353 Carondelet St., Suite 400 New Orleans, LA 70130  <b>Corporate Office:</b> Health Management Associates, Inc. 2501 Woodlake Circle, Suite 100 Okemos, MI 48864-5953
<b>C. Name, title, &amp; contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:</b>  Dan Castillo Managing Principal dcastillo@healthmanagement.com Direct: 504-272-7911 Mobile: 949-933-8013
<b>D. Address of principal office where Project work will be performed:</b>  Health Management Associates, Inc. 353 Carondelet St., Suite 400 New Orleans, LA 70130
<b>E. Is this submittal by a JOINT-VENTURE? Please check: YES _ NO <input checked="" type="checkbox"/></b>  <b>If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.</b>
<b>F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.</b>
1. N/A
2. N/A

**G. Has this JOINT-VENTURE previously worked together? N/A**

Please check: YES \_\_\_\_\_ NO \_\_\_\_\_

**H. List all subcontractors anticipated for this Project. Please note that all subcontractors must submit a fully completed copy of this questionnaire, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.**

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. N/A	N/A	N/A
2. N/A	N/A	N/A
3. N/A	N/A	N/A
4. N/A	N/A	N/A
5. N/A	N/A	N/A

**I. Please specify the total number of support personnel that may assist in the completion of this Project:**

For this project, Health Management Associates, Inc. (HMA) proposes a core team of three people to ensure adequate local context (two of three consultants live in the Greater New Orleans area), subject matter expertise on aging adults, and experience in leading parish- and county-level needs assessments. This core team will ensure project efficiency and timeliness. As the project evolves, HMA also has a national team with varied experience and subject matter expertise from which to draw additional and/or differentiated support, including experts in research, data collection, analysis, and community needs assessments, to ensure the project maximizes public funds. HMA is sensitive to the unique funding constraints of public entities and works to ensure all work products are smart on cost and delivered on agreed-upon timelines.

**J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e., resume). Please attach additional pages if necessary.**

HMA presents a team with comprehensive expertise and background in needs assessments, program development, and community engagement. We bring local healthcare and programmatic knowledge to the greater Jefferson Parish region as current residents, having led influential organizations in the community. We also bring experience from local government agencies outside of Louisiana, which will enhance our ability to convey best practices from around the country. Our years of experience and passion for our community, coupled with our efficient work processes and strong project management skills, will enable us to deliver the project within the specified time frame while meeting the project's objectives through a high-quality needs assessment with actionable recommendations.

HMA has included resumes in Appendix 1.

**EXHIBIT 1. PROPOSED HMA TEAM MEMBERS**



**Dan Castillo, MHA, FACHE, FACMPE**  
*Managing Principal*

**Project role:**  
Project director; national and local landscape and policy analysis; market intelligence



**Liz Marcell Williams, EdD**  
*Principal*

**Project role:**  
Project manager; leading survey and focus group design and execution



**Jennifer Hodgson, PhD, LMFT**  
*Principal*

**Project role:**  
Co-lead on interviews; analysis of effective practices; consideration of needs for aging adults below the poverty line

**EXHIBIT 2. PROPOSED TEAM MEMBERS' RELEVANT EXPERIENCE**

	Needs Assessments	Data Sourcing	Focus Groups	Stakeholder Interviews	Local Presence / Context	Gap Analysis	State and Federal Policy	Senior-Focused programming
Dan Castillo	■	■			■	■	■	■
Liz Marcell Williams	■		■	■	■	■		■
Jennifer Hodgson	■	■	■	■		■		■

**PROFESSIONAL NO. 1**

**Name & Title:**

Dan Castillo, MHA, FACHE, FACMPE  
Managing Principal

**Name of Firm with which associated:**

Health Management Associates, Inc.

**Description of job responsibilities:**

- Project director and lead for the HMA New Orleans office
- Gap analysis of current state and services not being provided by parish government that are necessary to meet the needs of the aging population
- Research nationally and locally sourced data
- Incorporate changes in national health policy that could impact the future of senior care
- Intel on market developments that may complement programmatic and/or service recommendations for seniors



<b>Years' experience with this Firm:</b>
September 2012–October 2013; September 2023–present
<b>Education: Degree(s)/Year/Specialization:</b>
Master of Health Administration, University of Southern California, 2007, specializing in government-run programs Bachelor of Science, Kinesiology, University of Southern California, 1994
<b>Other experience and qualifications relevant to the proposed Project:</b>
<p>Board-certified healthcare executive with more than 25 years in leadership, including county government, hospitals, health plans, and physician groups. Track record of leading large teams to perform organizational and community needs assessments, which drive strategic plans for innovative programs, new affiliations, revenue growth opportunities, and greater access to high-quality services for the population served.</p> <p>Tulane School of Medicine, November 2018–September 2023. Served as vice president and chief operating officer (COO) and led the full assessment of the clinical and research enterprises to understand internal and external strengths, weaknesses, opportunities, and threats to the university. Convened leadership meetings across all physician and administrative leaders and community stakeholders to advance strategic goals in partnership with the three-hospital joint venture partner, which led to plans for growth and financial sustainability of the enterprise. This work served as the foundation for transitioning the hospital affiliation to Louisiana Children's Medical Center (LCMC) to better meet the needs of the School of Medicine, the university, and the community. Also served on the health system board, which reviewed and approved the health system's community health needs assessment.</p> <p>Los Angeles County + University of Southern California Medical Center, October 2013–February 2017. Served as chief executive officer (CEO) overseeing the system's operations, finances, and quality of care. Led a team to complete a year-long community health needs assessment for the facility, which must be done every three years, and collected data on various health topics, such as demographics, social determinants of health, health behaviors, healthcare access and utilization, health outcomes, health opinions, and beyond. The team used the data to assess the health-related needs of the population, develop policies, and assist with program planning and evaluation. It allowed us to obtain health indicator data for large demographic subgroups across geographic regions of the county, including supervisorial districts, service planning areas, and health districts.</p> <p>County of Orange Health Care Agency, California, August 2006–May 2011. Served as an administrator. The work involved partnering with community-based and provider organizations to transform the county's safety net through stakeholder convenings to perform a needs assessment with specific action plans to deliver on the county's goals and objectives. We applied for an 1115 waiver federal demonstration to draw down an additional \$60 million of new federal revenue to the county, which allowed for a full redesign of the care delivery system for the uninsured. We could not have achieved this without involving the community to identify targeted resources for the program's 65,000 enrollees, including those unemployed, seniors not yet eligible for Medicare, and the working poor.</p>

<b>PROFESSIONAL NO. 2</b>
<b>Name &amp; Title:</b>
Liz Marcell Williams, EdD Principal
<b>Name of Firm with which associated:</b>
Health Management Associates, Inc.
<b>Description of job responsibilities:</b>
<ul style="list-style-type: none"> <li>■ Overall project management</li> <li>■ Lead for creating and administering surveys</li> <li>■ Lead for convening in-person focus groups with seniors and senior citizen service providers and coordinating public hearings</li> <li>■ Co-lead for key stakeholder interviews</li> </ul>
<b>Years' experience with this Firm:</b>
June 2024–present
<b>Education: Degree(s)/Year/Specialization:</b>
<p>Doctor of Education, Culture, Communities, and Education, Harvard Graduate School of Education, 2010</p> <p>Master of Education, Harvard Graduate School of Education, 2006</p> <p>Bachelor of Arts, Italian Language and Literature, Smith College, 1999</p>
<b>Other experience and qualifications relevant to the proposed Project:</b>
<p>In addition to extensive experience leading strategic planning and needs assessment processes and knowledge of local and regional human services, additional experiences and qualifications relevant to this project include:</p> <ul style="list-style-type: none"> <li>■ Trained qualitative and quantitative researcher with experience in survey design, interview protocol design and execution, focus group protocol design and execution, portraiture, mixed-methods study design, data coding, and analysis</li> <li>■ Founder and CEO of Center for Resilience (2014–2023), the only therapeutic partial hospitalization program for children with behavioral health needs in Louisiana <ul style="list-style-type: none"> <li>» Led community constituent meetings</li> <li>» Formed partnerships with city agencies, higher education institutions, regional hospitals, and the area school districts to build and expand pediatric behavioral health programming for children in the Greater New Orleans area</li> <li>» Negotiated a unique bundled daily rate with five of the six Louisiana managed care organizations</li> </ul> </li> <li>■ Experience consulting with schools, school districts, government agencies, and nonprofit organizations, with extensive experience in strategic planning, needs assessments, and asset mapping</li> </ul>



<b>PROFESSIONAL NO. 3</b>
<b>Name &amp; Title:</b>
Jennifer Hodgson, PhD, LMFT Principal
<b>Name of Firm with which associated:</b>
Health Management Associates, Inc.
<b>Description of job responsibilities:</b>
<ul style="list-style-type: none"> <li>■ Co-lead for key stakeholder interviews</li> <li>■ Responsible for developing a list of services that are necessary for those seniors living at or below the federal poverty level</li> <li>■ Insight into best practices across other regions/states</li> <li>■ Ensures to highlight the list of services desired by seniors who are not on a fixed income but are looking for opportunities to socialize with their peers</li> </ul>
<b>Years' experience with this Firm:</b>
August 2022–present
<b>Education: Degree(s)/Year/Specialization:</b>
Post-Doctoral Fellowship, Medical Family Therapy, University of Rochester, 1998 Doctor of Philosophy, Human Development and Family Studies, Iowa State University, 1997 Master of Science, Applied Family and Child Studies, Northern Illinois University, 1994 Bachelor of Science, Psychology, University of Akron, 1992
<b>Other experience and qualifications relevant to the proposed Project:</b>
Taught and conducted research while in higher education for 24 years with a focus on aging, family engagement, and chronic illness and disability across the lifespan. <ul style="list-style-type: none"> <li>■ Experience leading and conducting needs assessments and gap analyses toward population health improvement, designing opportunities toward improving wellness and health outcomes, and measuring and implementing evidence-based models and practices for behavioral, school-based, primary, secondary, and tertiary care and other healthcare settings</li> <li>■ Provided subject matter expertise for local-level provider entities, payers, health systems, states, professional associations, and federal-level proposals around behavioral health evidence-based practices; Certified Collaborative Behavioral Health Care Models; crisis care services; family therapy and engagement in care; healthcare disparities; workforce development, retention, and recruitment; leadership development; and health management technology, telehealth, and evidence-based behavioral health integration</li> </ul>

**K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.**

**PROJECT NO. 1**

<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
<p><b>Project Name:</b> University of Evansville, Mental Health and Wellness for the Geriatric Population of Southwestern Indiana</p> <p><b>Location:</b> Evansville, IN</p> <p><b>Owner and Contact Information:</b>            Sylvia DeVault            Senior Director of Major Gifts            1900 Lincoln Ave.            Evansville, IN, 47722            812-488-2239 (office)            812-598-8938 (cell)            sy5@evansville.edu</p>	<p>The University of Evansville engaged HMA to conduct a needs assessment of its older adult population using qualitative and quantitative methods. HMA used focus groups and a survey as primary data collection tools. HMA used the findings to:</p> <ul style="list-style-type: none"> <li>(a) outline the current state of mental health, physical health, and wellness services available and utilized within the five-county area</li> <li>(b) describe workforce issues affecting the ability of the community to meet the current and future needs of older adults living with mental health concerns and comorbidities limiting wellness</li> <li>(c) define the service needs of the growing, diverse adult population</li> <li>(d) identify appropriate collaboration partners</li> <li>(e) provide recommendations regarding addressing the behavioral and physical health needs of older adults in southwestern Indiana</li> <li>(f) identify the preventative and direct services needed to optimize the health of our target population</li> </ul> <p>The final report curated findings to address the most significant disparities within the older adult population of southwestern Indiana. This in-depth analysis put into motion a plan to better address the needs of this specific population and more tailored recommendations.</p>
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>
July–August 2023	\$199,925

<b>PROJECT NO. 2</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
<p><b>Project Name:</b> SHAPE the Future of Aging Plan, 2023–2028</p> <p><b>Location:</b> Fairfax County, VA</p> <p><b>Owner and Contact Information:</b> Tara Turner Director, Fairfax Area Agency on Aging 12000 Government Center Pkwy Fairfax, VA 22035 703-324-5411</p>	<p>HMA developed a three-year, three-phase community needs assessment—including assessment planning, data collection and analysis, stakeholder engagement, and the development of a strategic plan—to assist Fairfax County, Virginia, with planning for aging services for its diverse residents. The project's final deliverables aligned with Fairfax County's Countywide Strategic Plan and One Fairfax Policy, its health equity plan. The final report, SHAPE the Future of Aging Plan, 2023–2028, is available at <a href="https://www.fairfaxcounty.gov/aging/shape-the-future-of-aging-plan-2023-2028">Shape the Future of Aging Plan 2023-2028 (fairfaxcounty.gov)</a>.</p>
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>
June 2022–August 2024	\$199,999

<b>PROJECT NO. 3</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
<p><b>Project Name:</b> Rhode Island Behavioral Health System Technical Assistance</p> <p><b>Location:</b> Cranston, RI</p> <p><b>Owner and Contact Information:</b>  Marti Rosenberg  Director of Policy, Planning, and Research  3 West Road  Cranston, RI 02920  401-462-5274  marti.rosenberg@ohhs.ri.gov</p>	<p>The Rhode Island Executive Office of Health and Human Services engaged HMA to produce a comprehensive behavioral health study. This study described Rhode Island's current continuum of care for behavioral health needs across the lifespan and levels of need/acuity, mapped the current system and provider capacity (highlighting existing gaps), and benchmarked expenditures across all payers and various services. The initial phase of work created a base of data from which to drive future program priorities. The subsequent phase of this project translated the analytic learnings into actionable program options and implementation plans for the Executive Office of Health and Human Services. Our deliverable contained the guiding questions, data sources and analyses, and implementation steps required for the Executive Office of Health and Human Services to ensure identified policy options target high-priority areas of need. The Executive Office of Health and Human Services has retained HMA to support ongoing implementation of these priorities, which include outpatient clinic restructuring and crisis systems.</p>
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>
June 2020–present	\$220,000

<b>PROJECT NO. 4</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
<p><b>Project Name:</b> Behavioral Health Gap Analysis for Grays Harbor County, Washington</p> <p><b>Location:</b> Aberdeen, WA</p> <p><b>Owner and Contact Information:</b> Mike McNickle, PhD, MPH, MPA Director 2109 Sumner Ave. Aberdeen, WA 98542 360-500-4063 mmcnickle@graysharbor.us</p>	<p>HMA conducted a series of bivariate and geospatial mapping tasks to provide insight into behavioral healthcare accessibility gaps in Grays Harbor County. Using surveys, forums, provider focus groups, key informant interviews, and data analysis, HMA examined the behavioral health system of care through a mixed-methods approach. This mapping supported Grays Harbor in understanding gaps in behavioral healthcare access among Medicaid populations, particularly relating to race and ethnicity. This mapping also identified and supported Grays Harbor County Public Health's efforts to expand and improve access to essential behavioral healthcare. The work highlighted the need to expand cultural competencies in communities with a high concentration of Medicaid enrollment and Hispanic populations. To view the dashboard, click this <a href="#">link</a>.</p>
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>
July–September 2022	\$74,655

<b>PROJECT NO. 5</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
<p><b>Project Name:</b> Substance Use Disorder (SUD) Systems of Care Assessment and Planning for the Indiana Division of Mental Health and Addiction</p> <p><b>Location:</b> Indianapolis, IN</p> <p><b>Owner and Contact Information:</b>  Kelly Welker  Director of Addiction and Prevention Services  402 W. Washington St.  Rm. W353  Indianapolis, IN 46204  317-618-0599  kelly.welker@fssa.in.gov</p>	<p>HMA led the development of SUD systems of care core competencies for counties within Indiana, including creating an implementation and planning tool. The project aimed to create the infrastructure necessary to measure a county or region's capacity to implement programs and interventions addressing substance use within their community; support culturally responsive systems of care; and participate in an integrated, person-centered approach to addressing SUD. The planning tool informed local decision-makers on the best practices for core SUD treatment-related activities in their county, with the intent of encouraging them to use opioid settlement dollars on evidence-based SUD treatment modalities.</p>
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>
2022–2023	\$508,000

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
<p><b>Project Name:</b> Umpqua Health Alliance Community Health Needs Assessment and Community Health Improvement Plan</p> <p><b>Location:</b> Douglas County, Oregon</p> <p><b>Owner and Contact Information:</b></p> <p>Yazmine McNair, MPH Project Manager 3031 NE Stephens St. Roseburg, OR 97470 541-229-7038, ext. 3316 541-817-3467 (direct) ymcnair@umpquahealth.com</p>	<p>In 2023–2024, HMA partnered with Umpqua Health Alliance, serving Douglas County, Oregon, in a collaborative effort among community and organizational partners to create its community health needs assessment. HMA designed the community health needs assessment to highlight five-year health trends in Douglas County regarding various health and social data indicators. HMA applied the following methods to inform the community health needs assessment: a countywide community themes and strengths assessment survey; priority population focus groups; community leader share-back meetings, including with the Community Health Needs Assessment Steering Committee and Umpqua Innovation Conference; and secondary data collection, review, and analysis. Once completed, HMA used the community health needs assessment as a framework to facilitate structured feedback from subject matter experts, including individual community members, community-based organizations, public health agencies, educators, education administrators, healthcare systems, and hospitals to define the goals, objectives, strategies, and key results for the ongoing work of Umpqua Health Alliance's community health improvement plan. HMA is currently working with Umpqua Health Alliance on a plan to implement and monitor its community health improvement plan.</p>
Length of Services Provided:	Cost of Services Provided:
March 2023 – September 2024	\$200,000



**L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.**

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1. N/A	N/A	N/A
2. N/A	N/A	N/A
3. N/A	N/A	N/A
4. N/A	N/A	N/A

**M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.**

In addition to the questionnaire responses furnished above, we've briefly addressed the evaluation criteria in the following sections.

**1. Professional Training and Experience**

As noted in the cover letter submitted with this statement of qualifications, HMA is uniquely positioned to support Jefferson Parish given our lived experience within and around the parish, and our capabilities of performing needs assessments by drawing on our knowledge of county services, human services, aging adult needs and services, and research methodologies. We have personally seen the school closures in our communities (i.e., Haynes Academy down the street from one of our homes) due to the declining number of children under the age of 18, which topped out around 1980, and the increasing number of seniors that is rising faster than the rest of the state and the country.<sup>1</sup>

HMA's team possesses extensive experience in community needs assessments, population health, geriatrics, and community engagement, predominantly living and working within Jefferson and Orleans Parishes, making us ideally suited to identify and prioritize the unique needs of this demographic.

Dan Castillo, a resident of Jefferson Parish, is a seasoned healthcare executive with more than 25 years of experience in health administration. Mr. Castillo specializes in health systems strategy, hospital leadership, medical group management, population health, and academic medicine. He most recently served the Tulane School of Medicine as its vice president and COO, where he led the full assessment of the clinical and research enterprises. He also convened leadership meetings across all physician and administrative leaders and community stakeholders to advance strategic goals in partnership with the three-hospital joint venture partner, which led to plans for the growth and financial sustainability of the enterprise. This work served as the foundation for transitioning the hospital affiliation to Louisiana Children's Medical Center (LCMC) to better meet the needs of the School of Medicine, the university, and the community.

<sup>1</sup> Drew Broach, "Jefferson Parish's population keeps getting older. Hard choices are ahead," Nola.com, November 24, 2023, [https://www.nola.com/news/jefferson\\_parish/jefferson-parish-faces-seismic-shift-in-age-with-hard-choices-ahead/article\\_388362f2-858d-11ee-b59e-3fd7515ab086.html](https://www.nola.com/news/jefferson_parish/jefferson-parish-faces-seismic-shift-in-age-with-hard-choices-ahead/article_388362f2-858d-11ee-b59e-3fd7515ab086.html).

As CEO of one the largest county hospitals in the nation (Los Angeles County + USC Medical Center), Mr. Castillo led a community health needs assessment for the facility, which became the focus of the county facility's strategic plan during his tenure. Mr. Castillo also worked as an administrator with the County of Orange Health Care Agency, where he spent five years partnering with community-based and provider organizations to transform the county's safety net. He helped bring nearly \$60 million of new federal revenue to the county, which allowed for a full redesign of the care delivery system for the uninsured. He could not have achieved this without leading a broad-based needs assessment for the program's 65,000 enrollees, including those unemployed, seniors not yet eligible for Medicare, and those who work but are poor. His expertise in organizational and community needs assessments and translating those into strategic plans, coupled with his comprehensive understanding of the local healthcare landscape, will be invaluable in identifying the specific needs of Jefferson Parish seniors.

Liz Marcell Williams is a visionary executive with more than 20 years of experience working at the intersection of healthcare and education and is a resident of Orleans Parish. In launching Center for Resilience, the only partial hospitalization program for children with significant behavioral health needs in Louisiana, Dr. Marcell Williams conducted a regional landscape analysis and needs assessment and convened constituents to identify community-level pediatric healthcare needs. Dr. Marcell Williams's expertise in community engagement, needs assessments, and program development will be instrumental in ensuring the needs assessment process is inclusive and responsive to the diverse needs of Jefferson Parish seniors. Dr. Marcell Williams is also a trained qualitative and quantitative researcher with academic and practical experience designing surveys and developing interview and focus group protocols.

Jennifer Hodgson is a licensed therapist who has also led strategic planning processes for community and healthcare programs. She has significant experience supporting agencies to develop approaches to family and constituent engagement and 24 years of experience teaching higher education courses that included a focus on aging. Dr. Hodgson brings expertise in needs assessments, program development, and workforce development, which will be essential in identifying the unique needs of Jefferson Parish seniors and developing strategies to address them. She has collaborated with her local senior living center for more than 20 years, addressing chronic illness and the psychosocial needs of individuals and families impacted by neurodegenerative diseases.

## 2. Firm Overview and Key Personnel

Founded in 1985, HMA is a leading independent, national research and consulting firm that provides technical assistance and training, needs assessments, facilitation and strategic planning, research and evaluation, policy development and recommendations, technical report writing, and analytical services with a focus on improving the administration and delivery of public health, healthcare, and social services programs. HMA's team includes approximately 800 consulting colleagues and over 950 total employees across all HMA companies, who have provided services in all 50 states, the District of Columbia, and several US territories. Our offices are headquartered in Michigan, and we maintain offices in more than 20 states and Washington, DC. HMA has an office on Carondelet Street in the Central Business District of New Orleans.

Our team comes from all sides of the publicly funded healthcare arena. Formerly, we excelled as:

- State Medicaid directors, mental health commissioners, budget officers, and county government leaders, including heads of health and human services departments and leads of councils and departments on the aging
- CEO, COO, chief financial officer, and other hospital, health system, and state-based health insurance marketplace leaders
- Managed care executives
- Physicians and other clinicians who have run health centers and integrated systems of care and many of whom still practice medicine
- Policy advisors to governors and other elected officials
- Senior officials from the Centers for Medicare & Medicaid Services and the Office of Management & Budget
- Executives of community-based organizations, foundation program directors, civic leaders, university professors, researchers and statisticians, and community leaders

Our team intimately understands the challenges and constraints our clients face, working across disciplines and geographical areas to apply that knowledge to every client. Mr. Castillo, Dr. Marcell Williams, and Dr. Hodgson will serve as HMA's primary team members on this project (see Appendix 1 for their resumes). For this project, we will centralize our work in our New Orleans office.

### 3. Capacity for Timely Completion

HMA anticipates the project to take between six and nine months to complete. We can complete this work within that time frame. Furthermore, given the size and depth of our firm, we can pull in additional team members to assist as needed (i.e., executing a critical mass of phone surveys to senior residents within Jefferson Parish). HMA's proposed approach includes:

- **Defining sources of truth for the key indicators of the analysis:** Determine the community stakeholders, providers, departments, and agencies to include in our data collection efforts. In addition, we will outline the local, regional, and federal data sources we will use when evaluating census trends like age, household composition, veteran status, population trends, birth and death rates, and race/ethnicity. We will also identify sources for all social determinants of health factors, such as housing status, transportation access, homelessness, language preference and barriers, social service assistance, and family support.
- **Gathering quantitative and qualitative data:** Collect the necessary data from multiple sources, as determined by the key indicators outlined by Jefferson Parish. We can acquire these data by analyzing census, claims, and publicly available federal and local data. We will also want to understand what funding sources go to the senior population today, such as the \$1.5 million that supports the 103,000 seniors within the Parish and the services provider through the Jefferson Council on Aging, and what other funding sources are available but not being tapped into.
- **Engaging with stakeholders and holding focus group sessions:** Engage key stakeholders, including community members with lived experience, providers, local government agencies, and policymakers, through public meetings and phone surveys to gather their perspectives on the prevalence, frequency, and types of needs in the community and potential service desires based on the overall need of seniors within the community.

- **Analyzing data and mapping services:** Use statistical techniques and other methods to analyze the collected data and identify senior citizen needs, potential gaps, and disparities in services and outcomes. This analysis includes developing a comprehensive map of existing senior services versus what a future state can and should look like.
- **Synthesizing the findings into a final report:** The needs assessment findings will include the stratification of community demographic and socioeconomic patterns discovered during the data-gathering phases merged with the information gathered from the community and public meetings and phone surveys to identify a list of priorities for the parish. HMA will develop a high-level action plan to assist Jefferson Parish toward ongoing engagement efforts with its senior voter constituents that can lead to a strategic plan to meet and enhance the needs of senior residents.

Our team's combined expertise and experience in needs assessments, program development, and community engagement, coupled with our efficient work processes and strong project management skills, will enable us to deliver the project within the specified time frame and a high-quality product.

#### 4. Past Performance

HMA has subject matter expertise related to aging adults and extensive relevant experience performing needs assessments for local authorities, counties/parishes, states, and the federal government. For example, HMA supported the City of West Hollywood in implementing its aging-in-place strategic plan through collective impact evaluation. Launched in 2016, the initiative's programs aimed to improve the lives of older adults and increase their ability to remain in their homes as they aged. In the initiative's first year, HMA developed the evaluation plan, which drove significant programmatic planning and implementation work by the city and its stakeholders. Key work areas included the development and execution of an evaluation plan, including citywide surveys, citywide health and wellness indicators, program-level evaluations, staff training, data analysis and reporting, and presentations to boards, commissions, and the city council. Ongoing work included developing specific process measures, short- and long-term goals, and metrics at the specific initiative and macro citywide levels. The project concluded in 2022. HMA's role included all the quantitative and qualitative data collection planning and execution, training of staff and stakeholders, and ongoing project monitoring.

Recently, HMA led a statewide behavioral health needs assessment, which resulted in a five-year strategic plan for the Colorado Department of Human Services, Office of Behavioral Health. The objective was to document mental health and substance use needs across the state, project Coloradans' future needs, and develop a strategic plan for the state. Special emphasis focused on identifying population disparities in access to care and the use, or lack thereof, of culturally responsive best practices. The needs assessment included gathering qualitative data from stakeholders, conducting key informant interviews and focus groups, reviewing current peer-reviewed and grey literature, and leveraging existing quantitative data. We interviewed more than 80 stakeholder organizations and surveyed 63 county administrators and agency leaders representing 51 unique counties to gain perspectives on behavioral health needs and innovation. We also surveyed 300 providers and behavioral health clients representing 34 unique counties across Colorado. The Office of Behavioral Health used the information collected to guide and inform behavioral health programming across Colorado.

Another relevant project example is the strategic planning work HMA performed for Harris County, Texas. This project involved working with Harris Health and Community Health Choice, the Medicaid managed care health plan affiliated with Harris Health, to assist each organization in developing a long-term strategic plan. In addition to creating two actionable and dynamic plans that Harris Health and Community Health Choice will implement to meet their strategic goals, HMA is also providing extensive support through our change management expertise at all levels through the planning process to foster communication, enhance engagement, and build sustainable organizational capacity, all of which will promote the successful implementation of their strategic plans. Objectives included:

- Conducting a community needs analysis and risk assessment
- Engaging a wide range of internal and external stakeholders to guide, inform, and support implementing the plan
- Identifying strategic issues and critical success factors, including social determinants of health that impact target populations over the next five years and developing goals to improve health outcomes
- Identifying strategic options, priorities, and needs
- Providing a roadmap and financial plan to support strategic initiatives, including expanding or developing new government healthcare programs

HMA produced and presented a comprehensive strategic plan that the Harris Health Board of Trustees is currently vetting. The strategic plan includes addressing goals related to quality and patient safety; enhancing patient, staff, and provider experiences; building a culture of respect, recognition, and trust; strengthening Harris Health's value to the community through providing services with the highest impact; and optimizing facilities and information technology infrastructure.

An additional relevant project included a needs assessment that HMA performed for the Arizona Health Care Cost Containment System to assess how services to juveniles with serious emotional disturbances could best be delivered by leveraging resources from the state's Mental Health Block Grant funding. To do this, HMA utilized surveys and stakeholder focus groups and analyzed claims and encounter data. The data analysis included Arizona Health Care Cost Containment System juveniles with serious emotional disturbances and the services they receive within and outside of the juvenile justice system, an assessment for gaps in acute care services for justice-involved juveniles without serious emotional disturbances, and a review of current trends and gaps for providing culturally competent and evidence-based behavioral health services to this population. HMA used the findings to develop an action plan on current services, trends, gaps, and options for the state to move forward.

## **5. Principal Office Location**

HMA's principal office location, where we will perform the work, is in Orleans Parish, located at 353 Carondelet St., Suite 400, New Orleans, LA 70130.

## **6. Adversarial Legal Proceedings**

N/A

## **7. Completion of Projects**

Please see Section K above for our references.

**N. To the best of my knowledge, the foregoing is an accurate statement of facts.**

**Signature:**  **Print Name:** Kelly Johnson

**Title:** Chief Administrative Officer **Date:** October 22, 2024, 12:43 PDT

## Appendix 1 – Resumes

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### **Dan Castillo, MHA, FACHE, FACMPE**

Managing Principal

*New Orleans, Louisiana*

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#### **Range of Experience**

- Servant leader with more than 25 years of experience in healthcare leadership, including county hospital and county-owned health plan assessments and strategic planning, provider-owned systems, academic-based systems, and virtual care
- Proven track record of collaborating with stakeholders and community-based organizations and building public-private partnerships to support program creation and growth, and operational improvements

#### **Professional Experience**

##### **Health Management Associates, Inc., September 2023–present**

- Managing principal for the New Orleans office and market lead for Louisiana and Mississippi
- Louisiana home and community-based services federal and state assessment and analysis
- Louisiana Department of Health Review Advise and Inform Board representative for Region 1 (Orleans, Jefferson, St. Bernard, and Plaquemines Parishes)
- Beauregard Health System, Louisiana, revenue cycle assessment and artificial intelligence integration into RCM
- Equality Health value-based care network development lead in Louisiana
- Prairieville Hospital, Louisiana, needs assessment and conversion to a behavioral health facility

##### **Tulane University, New Orleans, LA, Adjunct Professor, August 2023–present**

- Teaching Health Systems Concepts in the Master's in Health Administration Program, with topics ranging from health systems thinking to the insurance market to financing, value creation, strategy, and public policy

##### **Health System Vice President and Chief Operating Officer, December 2018–August 2023**

- Managed operational and strategic oversight of affiliations, including a joint venture partnership of three hospitals with a combined 548 beds and more than 30 outpatient sites
- Served on the health system board and chaired the Finance Committee to ensure alignment of hospital and physician strategies and priorities
- Performed internal and external needs assessments to serve as the basis for strategic planning and capital investments that incorporated service line growth using five- and 10-year models which led to targeted service line investments such as a hybrid operating room for increased neuro volumes, the addition of a cath lab to support the expansion of electrophysiology, the acquisition of a linear accelerator to modernize



oncology, and the beginning phases of a Parkinson Center of Excellence and a Heart Transplant Center

- Helped lead the transition to a new partnership with Louisiana Children's Medical Center (LCMC)

**Aligned Telehealth, Calabasas, CA, President and Chief Operating Officer, March 2017–November 2018**

- Oversaw a \$32 million budget, growing the company footprint from six to 17 states
- Secured enterprise-wide agreements with Dignity Health, Adventist, Christus, Universal Health Services, and the largest correctional management firm on the West Coast
- Oversaw provider recruitment and contract negotiations, adding more than 30 physicians and mid-level practitioners
- Reduced denial rates to less than 4 percent by improving provider documentation and coding
- Developed a model for population health management to contract with health plans

**Los Angeles County + University of Southern California Medical Center, Los Angeles, CA, Chief Executive Officer, October 2013–February 2017**

- Managed a \$1.6 billion budget, as well as the restructuring of the leadership team to include critical positions such as a new chief medical officer, chief quality officer, chief population health officer, and director of managed care
- Created a Lean Academy to promote hospital-wide performance improvements. Co-developed a system-wide employee engagement survey and improvement program
- Aligned with specialty physicians to create an innovative hub to support group visits, care management, and improve multidisciplinary teams, resulting in a \$4 million return on investment
- Worked with primary care physicians to create state-of-the-art patient-centered clinics, resulting in a \$4 million return on investment
- Spearheaded a patient experience improvement training program to advance HCAHPS (Hospital Consumer Assessment of Healthcare Providers and Systems) and CG-CAHPS (Clinician & Group Survey Consumer Assessment of Healthcare Providers and Systems) scores and developed a Patient Advisory Committee
- Led the development of inclusive policies and practices related to LGBT patients, visitors, and employees; recognized by the Human Rights Campaign Foundation as a "Leader in LGBT Healthcare Equality" in 2016

**Health Management Associates, Inc., Costa Mesa, CA, Principal, September 2012–October 2013**

- Principal lead for the Los Angeles County Department of Health Services safety-net integration effort to strategically contract nearly 2,000 county providers with key Medi-Cal managed care independent practice associations in preparation for healthcare reform
- Principal lead for a pediatric sub-acute and newly built acute care rehabilitation hospital in Southern California to assist with licensing and certified coding specialist certification
- Project lead for the San Francisco Department of Health System initiative to develop an integrated delivery system in preparation for healthcare reform

**Children's Hospital of Orange County Health Alliance, Santa Ana, CA, Chief Executive Officer, May 2011–August 2012**

**County of Orange Health Care Agency, Santa Ana, CA, Administrator, Medical Services Initiative, August 2006–May 2011**

**South Counties Pediatric Critical Care Medical Group and Newport Children's Medical Group, Newport Beach, CA, Administrator, April 2004–July 2006**

**Alamitos Dermatological Medical Group, Inc., Los Alamitos, CA, Administrator, February 1999–April 2004**

### **Community Involvement/Board Affiliations/Membership in Professional Organizations**

- Louisiana Department of Health Statewide Advisory Council, July 2023–present
- American College of Healthcare Executives, Fellow, 2009–present
- American College of Medical Practice Executives/Medical Management Association, Fellow, 2006–present
- Wellness Population Solutions Advisory Board, Member, 2018–2019
- University of Southern California Center for Health Systems Innovation, Member, 2016–2018
- America's Essential Hospitals Strategic Planning Committee, Member, 2015–2018
- Modern Healthcare Magazine CEO Power Panel, Member, 2015–2018

### **Education**

Master of Health Administration, University of Southern California

Bachelor of Science, Kinesiology, University of Southern California



**Liz Marcell Williams, EdD**

Principal

*New Orleans, Louisiana*

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### Range of Experience

- More than 20 years of education and healthcare nonprofit executive experience founding, leading, and scaling programming for underserved youth
- Specializes in educational and behavioral health programming, with comprehensive experience at the city and regional levels
- Excels in strategic planning and implementation, executive management, and systems thinking, developing innovative programs and delivering pivotal expansions
- Skilled in constituent management, including interdisciplinary and cross-sector collaboration and partnerships, public speaking, fundraising, and donor relations
- A respected leader with experience working with healthcare and education constituents to address gaps in educational services and pediatric healthcare
- Fluent in Italian and conversational in Spanish

### Professional Experience

#### **Health Management Associates, Inc., June 2024–present**

- Supports school-based healthcare and pediatric behavioral health initiatives; needs assessment, strategic designs, and implementation planning projects; qualitative data collection; nonprofit management and expansion; and community health strategy
- Currently leading a data analysis and evaluation project for the State of North Dakota regarding school-based nursing and telehealth services; supporting projects related to community-based wraparound services, revenue maximization, and nonprofit operational effectiveness

#### **Center for Resilience (CfR), New Orleans, LA, Founder, Senior Advisor, June 2023–December 2023; Founder, Chief Executive Officer, December 2018–June 2023**

- Led CfR's nonprofit transition from the state-run New Orleans Therapeutic Day Program
- Drove organizational improvements, leading CfR to triple its capacity, expand from one to three youth-facing programs, and develop innovative and creative revenue structures
- Oversaw strategic initiatives and partnerships, operations, and fundraising efforts

#### **Founding Executive Officer, New Orleans Therapeutic Day Program, September 2014–November 2018**

- Designed, launched, and operated a therapeutic, trauma-informed day program for students in grades K–12 with diagnosed severe behavioral and mental health disabilities in response to a lack of day treatment, partial hospital, and residential treatment options for children in Greater New Orleans
- Designed and managed all aspects of the program, including:
  - Collaborating with community constituents
  - Researching effective practices
  - Developing academic curriculum

- Designing positive, restorative discipline policies
- Overseeing all program aspects, including instructional, therapeutic, financial, operational, and human resources elements
- Hiring and training all program staff
- Leading fundraising efforts
- Managed a team of 60 full-time staff members and 10 contractual service providers
  - Directly managed a 10-person interdisciplinary executive team
- Collaborated with the Tulane University School of Medicine to design the clinical model and deliver medical and clinical services
- Developed a partnership with the Children's Hospital New Orleans, resulting in a shared services agreement
- Managed the recredentialing process to secure CfR's licensure as a partial hospitalization program
- Negotiated a unique, bundled daily rate with the six Louisiana Medicaid plans and the Louisiana Department of Health, ensuring long-term organizational stability
- Collaborated with the Louisiana Department of Health to revise state regulations and expand behavioral health treatment and placement options for children and adults
- Designed and oversaw an aggressive long-term expansion plan to ensure a build-out of a continuum of mental health services for children and adolescents in Greater New Orleans, resulting in:
  - Quadrupling program capacity and staff size
  - Launching a high school program
  - Launching the Prism Program for children with autism and related spectrum disorders
- Contracted with the University of Pennsylvania to become the only regional training and dissemination center for Preventing Long-term Anger and Aggression in Youth, a stress management, conflict resolution, and racial literacy intervention for African American youth
- Authored a successful charter school application for a relationships-based open enrollment school, preschool through 8<sup>th</sup> grade
- Raised more than \$5 million in grant funding to support program operation and expansion
- Transitioned more than 80 percent of children served to a less restrictive traditional school setting successfully
  - Reduced short-term acute behavioral hospitalizations by 60 percent, consistently exceeding partner and family satisfaction goals

**ReNEW Schools, New Orleans, LA, Founding Executive Director of Intervention Services, June 2011–September 2014; Director of Special Education, April 2010–May 2011**

- Designed and managed all aspects of special education programming, Response to Intervention implementation, homebound instruction, Section 504, and English Language Learner support
- Held responsibility for executive functions, including:
  - Setting the Intervention Services vision and strategic plans
  - Developing relevant policies and procedures
  - Delivering professional development to staff members
  - Ensuring compliance with state and federal regulations
  - Managing campus-based special education coordinators and other members of the Intervention Services and Pupil Appraisal Team
- Launched the innovative ReNEW Therapeutic Program in partnership with Louisiana State University to support students with severe emotional and psychiatric disabilities

- Collaborated with the data team to design an organization-wide multitiered system of support approach for academic and emotional/behavioral intervention
- Developed unique, specialized instructional settings for students with moderate-to-severe autism spectrum disorder and intellectual disabilities
- Secured more than \$1.5 million in grant funding to support special education initiatives

**Thomas Hehir & Associates, Boston, MA, Special Education Consultant, September 2008–May 2011**

**The New Teacher Project, Remote, Consultant, September 2009–February 2010**

**Boston Teacher Residency, Boston, MA, Instructor, November 2007–May 2008**

**Teach for America Greater New Orleans, New Orleans, LA, Founding Director of Program Resources, May 2003–August 2005; Program Director, May 2002–May 2003**

### Select Publications

Pearson, K., Marques, L., Stevens, M., and Marcell Williams, E. "Trauma and discipline disproportionality: Treating the underlying conditions." In *Exploring and Addressing Discipline Disparities Among Students with Disabilities*, edited by P. Fenning, M. Johnson, Teacher's College Press, 2022.

San Antonio, D.M., Marcell, E., Tieken, M., and Wiener, K. "Lives in translation: What students say." *Educational Leadership Online* 68, no. 7. (April 2011).

### Community Involvement/Board Affiliations/Membership in Professional Organizations

- Board Member, Waldorf School of New Orleans, 2023–present
- Board Member, St. Lillian Academy, 2017–present
- Campaign for an Equitable New Orleans, 2017–present
- Board Member, Education Research Alliance New Orleans Advisory Board, 2020–2023
- Board Member, Opportunities Academy, 2017–2019
- New Orleans Health Department Core Advisory Team, 2017–2022
- Behavioral Health Council Education Work Group, 2016–2020
- Participant, Loyola University New Orleans Women's Leadership Academy, 2020
- Advisory Board Member, Special Education Leader Fellowship, 2015–2019
- Fellow, Teach for America School Systems Leaders Fellowship (now Cambiar Catalyst), 2014–2015
- Charter School Representative, Special Education Advisory Panel to Louisiana Department of Education, 2011–2014
- Vice Chair, Louisiana Special Education Cooperative, 2010–2014
- Inaugural Fellow, Norman C. Francis Leadership Institute, 2012–2013

### Awards/Recognition

- Nonprofit of the Year (Center for Resilience), New Orleans City Business, 2023
- Woman of the Year, New Orleans City Business, 2022
- Health Care Hero, New Orleans City Business, 2020
- Health Care Hero, New Orleans City Business, 2019
- Certificate of Distinction in Teaching, Harvard University, 2008
- Certificate of Distinction in Teaching, Harvard University, 2007
- Certificate of Distinction in Teaching, Harvard University, 2006
- Certificate of Distinction in Teaching, Harvard University, 2005

- Virginia B. Hof Teaching Award, University of Wisconsin-Madison, 2002
- Teacher of the Year, Sullivan Elementary School, 2001

## Education

Doctor of Education, Culture, Communities, and Education, Harvard Graduate School of Education

Master of Education, Culture, Communities, and Education, Harvard Graduate School of Education

Bachelor of Arts, Italian Language and Literature, Smith College



**Jennifer Hodgson, PhD, LMFT**  
Principal  
*Nashville, Tennessee*

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### Range of Experience

- Behavioral health leader and experienced consultant passionate about creating a more equitable and accessible healthcare system
- Leadership expertise in evidence-based integrated behavioral healthcare, health equity, federally qualified health centers, and patient-family engagement strategies
- Experience in provider wellness and retention, digital and virtual models for behavioral health, and the use of electronic health record technology to better engage patients and caregivers
- Higher education achievements with more than 24 years in hiring, training, researching, and consulting services in primary, secondary, and tertiary healthcare settings
- Team-based experience with administration, instruction, research, policy, accreditation, and team-building consultation in both academic and community-based settings
- Documented leadership in co-creating behavioral health integration innovation, technology, digital formats, and health equity, along with the role of artificial intelligence to reduce bias and racism in care delivery

### Professional Experience

#### **Health Management Associates, Inc., August 2022–present**

- Experience leading and conducting needs assessments and gap analyses toward population health improvement, designing opportunities toward improving wellness and health outcomes, and measuring and implementing evidence-based models and practices for behavioral, school-based, primary, secondary, and tertiary care and other healthcare settings
- Provided subject matter expertise for local-level provider entities, payers, health systems, states, professional associations, and federal-level proposals around behavioral health evidence-based practices; Certified Collaborative Behavioral Health Care Models; crisis care services; family therapy and engagement in care; healthcare disparities; workforce development, retention, and recruitment; leadership development; and health management technology, telehealth, and evidence-based behavioral health integration

#### **East Carolina University, Greenville, NC, Professor, Director of Medical Family Therapy Doctoral Program, August 2000–August 2022**

- Managed a portfolio of research projects, institutional review board documents, and research records focused on healthcare, sensory inclusion, health equity, healthcare technology, and biopsychosocial health outcomes
- Principal for a digital project that incorporated electronic health record technology to help reduce health disparities and promote health equity
- Secured more than \$4 million in grant funds related to integrated care



- Coedited two books in the field of medical family therapy; coauthored 67 peer-reviewed and 14 non-peer-reviewed articles, 30 book chapters, and 16 other published works (e.g., professional magazines)
- Presented more than 300 times in international, national, regional, state, and local professions forums, all to healthcare or behavioral healthcare audiences
- Designed, implemented, and directed an award-winning pioneering medical family therapy doctoral program that has graduated 40 students to date with a 100 percent employment rate
- Led the doctoral program through a rigorous re-accreditation process with no stipulations
- Advised and directed 21 doctoral students' dissertations to completion since 2005
- Designed and instructed courses (20 graduate and three undergraduate) with numerous awards related to teaching and scholarship
- Developed a 59-credit-hour curriculum for a first-of-its-kind medical family therapy doctoral program
- Taught behavioral health skills to more than 750 medical students, family medicine, and psychiatry residents and fellows
- Developed an integrated care model still implemented in the family medicine residency clinic

**Greene County Health Care, Inc., Snow Hill, NC, Integrated Care Consultant, January 2005–August 2022**

- Designed and assessed behavioral health services with a local rural federally qualified healthcare center serving more than 30,000 patients through an integrated behavioral healthcare model
- Hired, trained, and oversaw the fidelity of integrated behavioral health services to more than 150 masters- and doctoral-level clinicians
- Developed and provided employee wellness trainings to health system employees on resiliency and effective communication strategies for patient/family engagement and team building

**Select Presentations**

Hodgson, J. *Becoming an emotionally intelligent leader, 2-day Workshop*. Association of State and Territorial Health Officials Training, Virtua Conference, January 4 and February 3, 2022.

Hodgson, J., Forbes, T., Welch, M., Tucker, E., and Pye, J. *Strategies for engaging family in managing patient with complex care needs using EMR/EHR systems, Workshop*. Collaborative Family Healthcare Association Annual Conference, Virtual Conference, October 7–10, 2020.

Hodgson, J., Hulst, A., Lorenz, A., Reitz, R., Valeras, A., and Zak-Hunter, L. *Implementing family-centered care: Clinical, operational, and financial perspectives, Pre-conference institute*. Collaborative Family Healthcare Association Annual Conference, Denver, CO, October 17–19, 2019.

**Select Publications**

Forbes, T. (co-first), **Hodgson, J.** (co-first), Crespo, J., Jones, E., and Hardee, S. "Putting the Pieces Together: An Exploration of Diabetes Ketoacidosis Readmissions." *Journal of Contemporary Family Therapy* 42 (2020): 436–445, 10.1007/s10591-020-09551-9.

Haralson, D., Brimhall, A. (co-second), **Hodgson, J.** (co-second), Knight, S., Baugh, E., and Crespo, J. "Developing a Latinx-adapted Primary Care Parenting Program through Expert Consensus: A Delphi Study." *Journal of Contemporary Family Therapy* 43 (2021): 88–99, 10.1007/s10591-020-09556-4.

**Hodgson, J.**, Lamson, A., Amar, R., and Limon, F. “Medical Family Therapy in Community Healthcare Centers.” In *Clinical methods in medical family therapy*, edited by T. Mendenhall, A. Lamson, J. Hodgson, and M. Baird, 357–400. New York, NY: Springer International Publishing Co., 2018.

**Hodgson, J.**, Lamson, A., Mendenhall, T., and Crane, R. *Medical Family Therapy: Advanced Applications*. New York, NY: Springer International Publishing Co., 2014.

**Hodgson, J.**, Welch, M., Tucker, E., Forbes, T., and Pye, J. “Utilization of EHR to Improve Support Person Engagement in Health Care for Patients with Chronic Conditions.” *Journal of Patient Experience* 9 (2021): 1–8, 0.1177/23743735221077528.

Mendenhall, T., Lamson, A., **Hodgson, J.**, and Baird, M. *Clinical Methods in Medical Family Therapy*. New York, NY: Springer International Publishing Co., 2018.

Paries, C., Lamson, A., **Hodgson, J.**, Muse, A., and Mutinda, G. “Medical Family Therapy in Employee Assistance Programs.” In *Clinical Methods in Medical Family Therapy*, edited by T. Mendenhall, A. Lamson, J. Hodgson, and M. Baird, 497–536. New York, NY: Springer International Publishing Co., 2018.

## Education

Post-Doctoral Fellowship, Medical Family Therapy, University of Rochester

Doctor of Philosophy, Human Development and Family Studies, Iowa State University

Master of Science, Applied Family and Child Studies, Northern Illinois University

Bachelor of Science, Psychology, University of Akron