

INTRODUCTION

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The California Institute for Mental Health (CiMH) sponsored a two-day Developing a Curriculum (DACUM) process to identify the major areas of responsibility and the functions performed by fiscal managers within California county mental health departments. This document summarizes the results of that process including recommendations for potential next steps.

This work was initiated in recognition of the increasingly complex fiscal environment within which county mental health services are financed. The ability to understand, manage, and plan within this rapidly evolving and often uncertain fiscal environment is critical to a department's success. Having highly competent fiscal staff is therefore essential.

Yet little attention has been paid by the mental health field to analyzing and specifying what a "competent fiscal staff" means within today's world. Without this knowledge, it is difficult to recruit promising fiscal staff, to provide training to existing staff, and to plan for the orderly transition to new leadership as more experienced staff retires. With this in mind, the California Mental Health Directors Association (CMHDA) Financial Services Committee through the leadership of the Committee Chair Donna Wigand (Contra Costa County Mental Health Director) initiated CiMH's effort to delineate through a DACUM process the job functions of the fiscal staff, the general knowledge and skills required to perform these duties, and desirable worker characteristics.

The DACUM process is an approach to occupational analysis that is effective, quick, and low cost. It relies on successful workers within the particular job or occupational area to identify through a structured process the actual duties and tasks that they perform. Then through a brain-storming session, the group lists the characteristics and knowledge/skills required to successfully perform these job functions.

Representatives of the fiscal staff within 12 counties participated in this DACUM process. The counties ranged from small (Calaveras) to large (Alameda), and the participants were generally top managers of the fiscal divisions or major divisions within the counties. The occupational functions that were identified were thus major areas within the fiscal division and the competencies specified included some required of a top manager.

As will be described in the accompanying chart of duties and tasks, the DACUM process was also successful with the identification of knowledge and skills required and

characteristics that would facilitate successful performance of these functions. While the objective tasks in the areas of budgeting, reimbursement, and reporting are likely well known, the analysis revealed important less technical skills critical to success. These include the ability to format and make presentations; to participate with other managers in planning and policy deliberations; and to operate, supervise, and manage multiple complex tasks.

The report concludes that the most efficient means to ensure an ongoing supply of adequately trained fiscal staff is to create a leadership academy that would both create the content and produce the ongoing training environments for this occupational role. The development of curricula which cover both hard and soft knowledge and skills for the job functions outlined in the DACUM as well as information on all current topics would be one major role for this training academy. The academy would also develop varying packages of training environments covering both the means (e.g. conferences, on-site training, various electronic media), the length (e.g. one-time, monthly for a year), the participants (e.g. directors of unit, supervisors, analysts), and the kinds of trainers.

Counties will need to ensure that competent fiscal management and staff thrive in the face of likely significant changes in health care delivery and financing as California copes with serious budget constraints and as federal health reform is implemented. Hopefully this Project will highlight and enhance attention to this needed area of expertise and provide some concrete next steps which will ensure an ongoing supply of both technical and management talent for fiscal units.