

# ALLAN I. BERGMAN

## High Impact Mission-based Consulting and Training



Allan I. Bergman is an accomplished nonprofit community agency and association executive and nationally recognized leader in influencing the development of federal and state policy relating to "best practice" services and supports for persons with disabilities.

Bergman's career includes significant leadership positions within local, state and national non-profit agencies and associations. Most recently, he served as President and CEO of one of Chicago's largest community agencies, Anixter Center, supporting more than 5,000 individuals living with disabilities through 400 employees, 72 programs, and multiple sites. His earlier positions in Washington, D.C. included President and CEO of the Brain Injury Association of America, and significant leadership roles with United Cerebral Palsy Associations as Director of the Institute on Disability and Managed Care, Director of State-Federal Relations, and Director of Government Relations.

After completing his undergraduate degree in Psychology at Cornell University, Allan's early career included responsibilities at the Texas State Commission for the Blind, as Executive Director for the Austin (TX) Cerebral Palsy Center, and Executive Director of three Associations for Retarded Citizens in Dallas, San Francisco and the state of Colorado.

Bergman is an insightful and perceptive strategic planner skilled at aligning goals, groups and available resources. Allan works with all levels and functions within an organization to build a unified, strategic vision and consistent messaging to achieve long term goals, improve organizational efficiency, deliver meaningful outcomes to customers and a good return on investment to funders.

He possesses an extraordinary ability to understand and analyze highly complex problems and to present them and proposed solutions in an articulate and understandable manner to diverse audiences. Allan is astute at building strong relationships and business partnerships with multiple constituencies.

Allan's expertise includes broad knowledge of Medicaid, Medicare, managed care and long term services and supports policy, practice and financing. He has testified before many state legislative and Congressional committees and his fingerprints are on many bills that now are law. He was invited as an expert witness to testify before both the U.S. Senate Finance and House Energy and Commerce Committees on Social Security, employment and health policy issues, and worked with key congressional staff to develop Medicare and Medicaid work incentive proposals that were incorporated into federal law.

A passionate and charismatic speaker, Bergman has provided more than 200 keynote addresses and 150 workshops to over 50,000 individuals in all 50 states, Canada, Australia and Israel. Allan is at ease with multiple audiences including customers, volunteers, legislators, legislative staff, clinical researchers and practitioners. A nationally recognized trainer, he has provided leadership training to over 6,000 people.

### Among his numerous professional affiliations are:

- < American Society of Association Executives (ASAE), Diversity, Research and Key Philanthropic Organizations Committees
- < Illinois Association of Rehabilitation Facilities (IARF) Board of Directors
- < Institute for Public Policy for People with Disabilities Board of Directors
- < Illinois Protection & Advocacy Systems Traumatic Brain Injury Advisory Committee
- < Consortium for Citizens with Disabilities, Chair, multiple task forces - Washington, D.C.
- < Co-founder National Coalition on Aging and Disability - Washington, D.C.
- < National Conference of State Legislatures, Consultant/Faculty - Denver, CO
- < National Early Childhood Technical Assistance Centers, Consultant/Faculty - Chapel Hill, NC

### Consulting Services

*"...an expert in many issues who brings thoughtful, creative solutions to remove disability-related barriers for enhancing quality-in-life for persons with disabilities."*

Tony Young, March 2010

*"You have an irresistible way of drawing the hope out of folks and pooling it together. And then great things become possible."*

John Agosta, Ph.D., August 2009

#### Organizational Leadership Development

- Defining roles and responsibilities of board and staff; accountability and transparency
- Transforming board and committee meetings into high performance governance
- Conducting strategic analysis, planning and positioning to align goals and resources
- Establishing benchmarks and metrics for evaluation; what gets measured gets done
- Integrating the new IRS form 990 requirements into board policy and management
- Developing succession planning policy for chief executives

#### Public Financing

- Analyzing funding streams to define challenges and opportunities
- Evaluating and analyzing the state's Medicaid plan services, eligibility and use of waivers
- Accessing non-disability specific federal funding streams for services and supports

#### Health Care, Managed Care, Long Term Services and Supports and Integrated Care

- Writing Medicaid state plan amendments and HCBS waivers
- Developing and messaging Medicaid Buy-In for working age adults with disabilities
- Designing managed care in Acute Care, Long Term Services and Supports and Integrated Care

#### Staff Development, Training and Technical Assistance

- Promoting value based leadership
- Planning and tools to support new strategies and change management
- Creating best practice, customer/person centered services and supports

#### Government Relations

- Conducting public policy analysis and legislative/regulatory development
- Preparing testimony, briefing materials and white papers
- Planning advocacy campaigns; legislative analysis and strategic response
- Building a grass roots organization and coalitions
- Lobbying and legislative advocacy training

#### Project Development and Management in a Range of Service/Program Areas

- Creating program conversion/restructuring plans
- Developing new service start up plans and business models
- Researching, writing and reporting grant proposals
- Making Employment "Pay" by putting employment first using the Ticket to Work
- Identifying system change strategies

#### Motivational Speaker/Trainer/Workshop Leader on Focused Topics

- Turning funding crises into opportunities for system reform
- Living and thriving in the community: Anyone can with appropriate family support and individually tailored supports for adults
- Transitioning from school to meaningful, integrated adult life using functional outcomes
- "Knowing Your History": The Evolution of Disability Policy
- Understanding the Olmstead Supreme Court Decision and the ADA



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### Boards and Committees

American Society of Association Executives (ASAE); appointed member of Diversity Committee, 2009-; Research Committee, 2005-2009; Key Philanthropic Organizations Committee, 2001-2005.

Invited member of the Supplemental Security Income Transition and Work Incentives Committee of the Social Security Advisory Board, 2005-2006.

Appointed member of the Model Systems in Spinal Cord Injury, Traumatic Brain Injury and Burns Review Panel, U.S. Department of Education, National Institute on Disability and Rehabilitation Research, 2004-2006, (one of two of 16 members that was not a Ph.D. or M.D.).

Appointed member of the Advisory Council of the National Center for Medical Rehabilitation and Research at the National Institutes of Health, 1999-2003.

Appointed member of the Medicaid Home and Community Based Services Waiver work group for the Health Care Financing Administration (now the Centers for Medicare and Medicaid Services), 1993-1997.

### Awards

The President's Committee for Persons with Intellectual Disabilities, first George N. Bouthilet Award for outstanding service and support in the national effort to improve the quality of life that is experienced by persons with intellectual disabilities and their family members, November 2008.

Centers for Disease Control National Center for Injury Prevention and Control "in recognition of many contributions to improve the lives of people with traumatic brain injury," June 2004.

United Cerebral Palsy Associations "our immense appreciation for 12 years of visionary leadership, outstanding advocacy, and immeasurable contributions," August 1998.

United Cerebral Palsy Associations of California, Special Merit Award, 1990.

Colorado Developmental Disabilities Council, Excellence in Advocacy award, 1981-1986.

### Publications

Coauthor of "Legal and Ethical Issues", a chapter in The Essential Brain Injury Guide, Edition 4.0, Brain Injury Association of America, 2007.

Coauthor of "Community Integration Research: An Empowerment Paradigm", a chapter in Handbook of Applied Disability and Rehabilitation Research, edited by Hagglund & Heinemann, Springer Publishing Company, 2006.

Invited to write Forward for Getting Ready to Help: a Primer on Interacting in Human Services by Martin McMorrow, Paul Brookes Publishing Company, 2003.

Invited expert consultant and reviewer for Understanding Medicaid Home and Community Services: A Primer. U.S. Department of Health and Human Services, 2000.

Lead author of "The Thinking Behind New Public Policy", a chapter in Redefining Family Support edited by Singer, Powers and Olson, Paul Brookes Publishing Company, 1996.