

# Doreek Charles

Meriden, CT 06450

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## **EDUCATION**

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### **Doctoral of Social Work (PhD)**

**August 2021- Current**

University of Connecticut, Hartford, Connecticut

### **Master of Social Work (MSW)**

**May 2008**

Virginia Commonwealth University, Richmond, Virginia

Concentration: Policy, Planning, Administration

### **Certification in Gerontology/ Aging Studies**

**May 2008**

Medical College of Virginia (MCV), Richmond, Virginia

### **Bachelor of Arts, Psychology**

**May 2005**

Rowan University, Glassboro, New Jersey

Honors: Dean's List

## **RESEARCH INTERESTS**

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Social and Racial Justice

Racial and Health Equity

Structural/Institutional Racism

Human Rights

Social and Public Policy

Anti-Racism

Implicit Bias

Discrimination and Oppression

Resilience

Older Adults and Aging

Health Disparities/Outcomes

Economic Disparities and Poverty

Quantitative and Qualitative Research Methods

Trauma

Race-Based Traumatic Stress

Post-traumatic stress disorder and treatment

Substance Abuse/Behavioral/Mental Health

Mindfulness and contemplative approaches

## **RELEVANT PROFESSIONAL EXPERIENCE**

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### **Research Associate 2**

**April 2019- current**

*UConn Health Center on Aging, Farmington, Connecticut*

- Project manager for Connecticut's Department of Social Services (DSS) statewide Universal Assessment (UA) tool quality management (QM) initiative
- Manage development and execution of UA QM strategy, plan and implementation process
- Developed and implemented communication plan, agency benchmarks, assessor error rate, assessor training programs and assessment shadowing interventions
- Revised QM plan and implementation process as result of COVID-19 pandemic
- Supervise and lead research associate level 1 staff conducting state-wide UA quality management

- Provide clinical consultation to DSS and contractor care management agencies to ensure contracted staff demonstrate competency and accuracy in assessment coding and assessment skills
- Ongoing analysis and testing of UA data, design, level of need/care algorithm and corresponding budget methodology created to standardize equitable budget allocations for all home and community-based service (HCBS) populations
- Utilized universal assessment data to help identify individuals at risk during the COVID-19 pandemic due to food insecurity, lack of caregiver support, and need for personal protective equipment
- Developed algorithm programming instructions for new UA release for CT Housing Engagement and Support Services (CHESS) initiative
- Meticulously reviewed and revised UA business and system design documents developed by Deloitte consulting group for programming of CHESS UA into web-based platform
- Ongoing coordination with Connecticut DSS, Deloitte consulting, and the Lewin Group for new CHESS UA system release and corresponding algorithm
- Managed user acceptance testing and developed complex test cases for new system release
- Precisely reviewed Corticon business rules to ensure accurate algorithm programming
- Conduct training on new Level of Care tool that will be utilized by Beacon Health Options
- Worked with data manager to create and complete process to translate 4,000 individual data codes into new iCode matrix for interRAI Home Care data reporting process
- Participated in program planning and development of new DSS My Care Options initiative
- Contract monitor for training and technical assistance subcontractors and revise contracts
- Key team member developing ongoing research abstracts and papers including frailty and Medicaid/Medicare duals hospice utilization
- Provide content technical assistance for projects utilizing universal assessment data to measure outcomes for various populations including older adults with cognitive impairments receiving home and community based services
- Worked with Lewin Group to develop Optum *Long-term services and supports: Risk assessment for individuals dependent on caregivers* during the COVID-19 pandemic
- Present evaluation and quality management outcomes in multiple venues including national and state conferences, legislative meetings, and other key stakeholder meetings.

## **Research Associate 1**

**September 2017- April 2019**

*UConn Health Center on Aging, Farmington Connecticut*

- Evaluated and developed reports on impact and effectiveness of various training programs on contractor field staff, including competency-based aging and disability training developed by Boston University School of Social Work Center for Aging and Disability Education and Research (CADER)
- Developed new aging and disability competency-based certificate process for Money Follows the Person (MFP) contractor staff, developing and conducting testing review sessions, creating case study based testing exam, scoring rubrics, and grading exams
- Continued testing and refining items for ongoing implementation of the UA
- Created universal assessment training materials for assessment items including unmet needs, informal caregivers, strengths, challenges, risks and preferences
- Managed the training roll out as additional waiver populations began using the UA
- Conducted state-wide training sessions on UA Tool for contractor field staff

- Collaborated with the Lewin Group to analyze data from the full UA implementation, comparing distributions of level of need scores and made recommendations for adjustments where needed
- Based on user field staff feedback continued to analyze UA data to address identified issues and make recommendations for algorithm to better capture ADL/IADL, unmet need, cognitive impairment, and level of care determinations
- Developed algorithm programming instructions for scoring ADL activity did not occur
- Assisted with the development of web-based display of universal assessment data dashboard to summarize specific aspects of the UA data, including total number of completed assessments, distribution of level of need/care scores, and distribution of specific assessment items such as diagnoses and cognitive impairments
- Tracked contractor invoices and ensured accurate billing
- Attended project director meetings and MFP Steering Committee meetings and presented evaluation findings and project updates as needed
- Conducted biweekly staff meetings and prepared quality of life survey status reports
- Supervised and managed work of research assistants

### **Research Assistant 3**

**December 2015—September 2017**

*UConn Health Center on Aging, Farmington Connecticut*

- Created, led, and managed process for development of over 1,200 complex algorithm test cases for level of need programming across multiple scoring domains, including functional, behavioral, medical conditions, level of care and populations
- Developed program evaluation plan with Center on Aging team member for DSS Community First Choice (CFC) program
- Conducted focus groups, coded results, and drafted final report for CFC evaluation
- Coordinated contractor staff motivational interviewing training and coaching sessions
- Evaluated impact and effectiveness of motivational interviewing training
- Assisted with coordinating multi-agency committee for continued UA development
- Coordinated and tracked contractor field staff competency-based online trainings provided by Boston University CADER
- Tracked contractor invoices and ensured accurate billing
- Conducted initial and on-going interviewer trainings for research assistants
- Supervised and managed work of research assistants
- Conducted in-person/phone 6, 12, and 24 month quality of life surveys for MFP evaluation

### **Research Assistant 2**

**February 2013- December 2015**

*UConn Health Center on Aging, Farmington Connecticut*

- Key workgroup member developing a standardized Universal Assessment tool to be used across Medicaid waiver programs in determining service needs and equitable budgets
- Prepared a crosswalk binder of currently used CT assessment instruments and compared the questions asked in each assessment to the Centers for Medicare and Medicaid Services (CMS) core data set requirements
- Participated in kaizen quality improvement meetings with UA team, including DSS management, to review crosswalk and determine best approach/tool for Connecticut's UA
- Researched national and state best practices for development of universal assessment tool
- Developed and presented national and state best practice report to DSS leadership

- Participated in weekly UA work group meetings to inform the development and finalize instrument questions and modules for different populations
- Created functional level of care prescreen tool for individuals being assessed for HCBS
- Researched best practices for existing readiness tools
- Developed state-wide readiness assessment tools for each Medicaid waiver to determine MFP participant readiness for change/transition and need for engagement services
- Worked with contractor agencies, work group, and Lewin group to develop and test questions and algorithms for a comprehensive level of need assessment in each Medicaid waiver that includes functional, medical, and behavioral indicators to inform individual service budgets
- Continually tested and refined UA questions and algorithm programming as needed based on feedback from each round of testing
- Participated in business and application design and automation meetings with Deloitte consulting group for first UA release
- Meticulously reviewed and revised UA business and system design documents
- Conducted UA system user testing to ensure tool implementation
- Coordinated and tracked contractor field staff competency-based online trainings
- Created interviewer training material and conducted initial and on-going interviewer trainings for research assistants
- Supervised and managed work of research assistants
- Conducted in-person/phone 6, 12, and 24 month quality of life surveys for MFP evaluation

### **Research Assistant 1**

**June 2012- February 2013**

*UConn Health Center on Aging, Farmington Connecticut*

- Key team member evaluating Connecticut's Federal Money Follows the Person (MFP) Rebalancing Demonstration Grant which transitions individuals from facilities back into the community
- Conducted in-person baseline nursing home quality of life surveys for MFP evaluation
- Conducted in-person and phone post nursing home transition quality of life surveys at 6, 12, and 24 month time points for MFP evaluation project
- Developed tracking system to coordinate with MFP field staff to ensure Track 2 baseline quality of life surveys completed before participants transition from nursing home
- Collaborated with training staff from the Connecticut Department of Social Services to begin researching and developing various training content and formats (workshops, web based modules) for contractor agency transition coordinator field staff

### **Project Analyst**

**October 2008 - June 2010**

*Virginia Department of Medical Assistance Services (State Medicaid Policy Office)*

*Richmond, Virginia*

- Coordinated operational and programmatic aspects for Center for Medicare and Medicaid (CMS) System Transformation Grants and Money Follows the Person Project
- Administered and evaluated Money Follows the Person quality of life field surveys
- Established and maintained databases of grant projects using MS Excel, Access, and SAS
- Evaluated data collected and provided recommendations and quarterly reports
- Managed budget expenditures and completed federal grant progress reports
- Trained, had oversight, and acted as liaison with community survey administrators

- Conducted on-site and WebEx trainings and presented project updates
- Created educational and training materials such as newsletters and brochures for MFP
- Conducted site visits and provided technical assistance to different community providers such as: Local Departments of Social Services, Centers for Independent Living (CILs), Area Agencies on Aging (AAAs), and Home Health Agencies
- Drafted Home and Community Based Services (HCBS) CMS technical waiver amendments
- Developed and edited agency policy regulations and manuals
- Monitored fiscal intermediary contractor and developed performance standards for contract modifications
- Developed and wrote business rules for contract modifications
- Tracked all contractor administrative costs and services and processed invoices
- Member of Long-Term-Care Quality Improvement Initiative and evaluated quality assurance data

## **RESEARCH EXPERIENCE**

### **Health Policy Research Intern**

**August 2007 - August 2008**

*Virginia Joint Commission on Health Care, Richmond, Virginia*

- Conducted literature reviews using various research databases
- Summarized and drafted research findings on topics such as: supported housing for people with mental health disability, youth minority access to mental health services, and professional workforce shortages and pipelines
- Performed a 50 state policy analysis of tobacco control laws and provisions, including clean indoor air laws, youth access, and advertising efforts and presented written finding to senior policy staff
- Tracked and analyzed healthcare legislation and budget amendments
- Coordinated Joint Commission legislative meetings and presentations held for legislative commission members

### **Graduate Research Assistant**

**March 2007 - April 2008**

*Virginia Commonwealth University, Richmond, Virginia*

*Project: Informal Caregivers of Advanced Cancer Patients: The Impact of Geographic Proximity on Social Support and Bereavement Adjustment*

*PI: Dr. John Cagle*

- Collected quantitative and qualitative data for longitudinal research study
- Conducted in-depth literature reviews
- Recorded quantitative and qualitative data responses
- Maintained research files and managed project deadlines

### **Clinical Research Assistant**

**July 2006 - March 2007**

*The Medical College of Virginia (MCV), Richmond, Virginia*

*Project: Better Osteoporosis kNowledge, Education, and Screening (BONES) Study*

*PI: Dr. Anika Alvanzo*

- Recruited and consented research participants from ambulatory care center for multi-center quality improvement study, which evaluated an intervention that educates patients and physicians about osteoporosis to improve adherence to clinical guidelines for screening of osteoporosis in women 65 years and older

- Conducted baseline chart reviews to document prior osteoporosis screening and treatment
- Conducted in-person interviews
- Administered survey instruments regarding participant health, attitudes, and beliefs, knowledge concerning osteoporosis, and demographics
- Entered, reviewed, cleaned, and scored required data and ran statistics using SPSS

### **Research Assistant**

**September 2004- December 2005**

*Rowan University, Glassboro, NJ*

*Project: Impact of Social Coping Skills on Bulimic Symptomology: Exploring the Mediating Role of Affect*

PI: Dr. Jim Haugh

- Managed aspects of longitudinal research study evaluating social support on bulimic symptoms
- Recruited over 300 participants and administered 13 different research scales
- Trained other research assistants to administer research questionnaires
- Extensive data management and analysis, ran statistical analyses and interpreted results
- Prepared institutional review board (IRB) application for review and approval
- Performed intensive literature reviews
- Developed and presented research findings and written report at psychological conference

### **INTERNSHIP EXPERIENCE**

#### **Masters Social Work Intern**

**August 2007 - June 2008**

*Virginia Department of Behavioral Health and Developmental Services (DBHDS), Richmond, Virginia  
Organizational Policy Development Department*

- Assisted with the development, and implementation of employee communication trainings
- Aided with the development, planning, and coordination of Workforce Cultural Competency Conferences
- Collaborated with state-wide team members to develop and evaluate an organizational transformation gap analysis of state facility policies and procedures throughout Virginia
- Tracked organizational transformation outcome data using survey monkey software, analyzed the findings, and provided written reports to key department officials
- Participated in state workgroup developing the Center for Medicare and Medicaid Services (CMS) Federal Money Follows the Person Grant Operational Protocol

#### **Masters Social Work Intern**

**September 2006-June 2007**

*Virginia Commonwealth Head Start, Richmond, Virginia*

*Comprehensive Child and Family Support*

- Promoted academic, social, and emotional development for low-income pre-school children and families
- Developed policy analysis of parental involvement and Head Start policies
- Researched and coordinated employment skills and GED classes for Head Start parents
- Conducted clinical observations of assigned children in the classroom and assisted with the development, implementation, and evaluation of classroom behavior management plans
- Completed psychosocial histories on children referred to Richmond Public Schools
- Developed and coordinated social skills groups for children with behavioral challenges

## **PRESENTATIONS (Presenter Underlined)**

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Tsay, T., Shugrue, N., **Charles, D.**, Migneault, D., McManus, R., Gruman, C., & Robison, J. (2021) *Type of HCBS Support Provided Predictive of Frailty Status Change Among Older Participants*. Presentation at the Society for Post-Acute and Long-Term Care Medicine Annual Conference

**Charles, D.** & Lambert, D. (2020). *Developing and implementing Connecticut's Universal Assessment Quality Management Plan*. Presentation at Annual Home and Community Based Services Conference

**Charles, D.** & Weston, C. (2019). *Update on Connecticut's Universal Assessment Tool*. Presentation at CT Home Care Program for Elders Statewide Provider Conference, Southington, Connecticut

**Charles, D.** & Migneault, D. (2018). *Connecticut's Universal Assessment Tool*. Presentation at CT Home Care Program for Elders Statewide Provider Conference, Southington, Connecticut

Robison, J., **Charles, D.**, & Migneault, D. (2018). *Connecticut's Universal Assessment*. Presentation at Acquired Brain Injury Advisory Council, Hartford, Connecticut

Shugrue, N., **Charles, D.**, Gruman, C., McManus, R., Tsay, T., Bredfeldt, C., Lambert, D., & Robison, J. (2017). *Creating and Testing Connecticut's Universal Assessment Tool Across Multiple Populations*. Presentation at International Association of Gerontology and Geriatrics, San Francisco, California.

Keefe, B., **Charles, D.**, & Ford, P. (2015) *Connecticut Money Follows the Person Program: Using Online Training to Enhance Workforce Development*. Presentation at Annual American Society on Aging Conference, Chicago Illinois

**Charles, D.** & Ford, P. (2015) *Competency Based Workforce Training: Online Training to Enhance Worker Skills*. Presentation at 45<sup>th</sup> Association for Gerontology in Higher Education Annual Meeting and Educational Leadership Conference, Nashville, Tennessee

Haugh, J., Salminen, E., Hamilton, M., & **Charles, D.** (2006) *Impact of Social Coping Skills on Bulimic Symptomology: Exploring the Mediating Role of Affect*. Presentation at Annual Eastern Psychological Association Conference, Baltimore, Maryland.

**Charles, D.** (2005) *Stress and Coping Skills in Relation to Bulimia and Depression*. Presentation at 31<sup>st</sup> Annual Psychology Research Conference, Glassboro, NJ

## **PUBLICATIONS**

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Tsay, T., Shugrue, N., **Charles, D.**, Migneault, D., McManus, R., Gruman, C., & Robison, J. (2021). Predictors of Frailty Change in Home and Community-Based Services Populations. *Journal of the American Medical Directors Association*.

Robison, J., Shugrue, N., Migneault, D., **Charles, D.**, Baker, K., Fortinsky, R. & Barry, L. (in press). Community-based long-term care has lower COVID-19 rates and improved outcomes compared to residential settings. *Journal of the American Medical Directors Association*.

## **AWARDS, HONORS, AND SCHOLARSHIPS**

- Social Work Service Award (2008)
- Hartford Foundation Scholarship (2007)
- William Randolph Hearst Foundation Scholarship (2007)
- Awarded 6<sup>th</sup> Annual Dean's Recognition Tea, Significant Academic Achievement Award, Psychology (2005)
- Awarded Commission on Higher Education, Outstanding Academic Achievement Award (2005)
- Phi Kappa Phi (2005)

## **ADDITIONAL CERTIFICATIONS AND TRAININGS**

- Statistics Lecture, UConn Health Center on Aging, (2020-current)
- Aging and Disability Resource Center (ADRC) Options Counseling Certificate, Boston University School of Social Work Center for Aging and Disability Education and Research (CADER) (2019)
- Motivational Interviewing Training, conducted by Dr. Thomas Broffman (2013-2019)
- Holistic Health Counselor, HHC, Institute for Integrative Nutrition NY, New York (2006)

## **ADDITIONAL PROFESSIONAL EXPERIENCE**

### **Care Coordinator**

**June 2010- June 2012**

*Compassionate Reach Senior Care Services, Bloomfield, New Jersey*

- Performed initial and follow-up assessments of client's care needs
- Developed comprehensive care plans in collaboration with members of the care team
- Oversaw the implementation of the care plan
- Maintained relationships with payment and referral sources

### **Adolescent Counselor**

**August 2005 - August 2006**

*High Focus Center, Cranford, New Jersey*

- Facilitated and co-facilitated individual and group therapy programs for youth attending to the center such as: anger management, self-awareness, family and coping skills
- Assisted with development and intervention of behavior protocols for self-injurious youth
- Administered Minnesota Multiphasic Personality Inventory (MMPI) to adolescent clients
- Provided administrative assistance, reviewed and organized client charts

### **Full Time Youth Summer Residential Counselor**

**June 2005 - August 2005**

*University of Michigan, Musiker Summer Discovery Program, Ann Arbor, Michigan*

## **SERVICE**

- Board Member, Silver Source (current)
- Rowan University Student Help Line (2002-2005)

## **COMPUTER SKILLS**

REDCap, SPSS, Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) Microsoft Project, ATLAS.ti, Survey Monkey