

David M. Merlo, MS, COTA/L, CPRP, ROH

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I. Credentials:

- Certified Occupational Therapy Assistant NBCOT #AA54567
- New York State OTA License #001461-1
- Certified Psychiatric Rehabilitation Practitioner PRA #138628
- Roster of Honors – American Occupational Therapy Association

II. Current Position:

Restoration Society, Inc. Buffalo, NY

Direct innovation, quality, and workforce development within a community mental health agency serving people impacted by mental illness, homelessness, joblessness, and social barriers to full integration and participation within communities of choice.

III. Education:

Masters of Science in Adult Education. Emphasis on education and support services for adults with disabilities. Education Foundations Dept., Buffalo State College, NY. 2006.

Advanced Graduate Certificate. Assistive and Rehabilitation Technology. Occupational Therapy Dept., University at Buffalo, NY. 2003.

BA Health and Human Services. University at Buffalo, NY. Major in community mental health. 1994.

Certificate Psychiatric Rehabilitation. Boston University Center for Psychiatric Rehabilitation, off campus. 1989.

AAS Occupational Therapy. Erie Community College, Buffalo, NY. 1984.

AAS Horticulture - Landscape Design. Alfred State College, Alfred, NY. 1979.

IV. Past Experience:

Program Director (founding director). Bryant & Stratton College (Rochester, NY), Occupational Therapy Assistant Program. July 2014 – present.

Responsibilities include developing program philosophy, program design and curricula; hiring, training and supervising faculty; writing program policies; recruiting, admitting, and supporting qualified students; representing the institution and program within the community; managing, monitoring, and reporting compliance to Accreditation Council of Occupational Therapy Education (ACOTE) and state education department.

Teaching responsibilities included:

- OTAP-101 Introduction to Occupational Therapy
- OTAP-120 Human Occupations
- OTAP-201 Psychosocial Interventions
- OTAP-250 Adaptive Interventions

Professor Emeritus/Academic Fieldwork Coordinator. Erie Community College, Occupational Therapy Assistant Program. January 1996 – June 2014.

Teaching responsibilities included:

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|----------|--------------------------|----------|-----------------------------------|
| ▪ OT-101 | Introduction to OT | ▪ OT-140 | Professional Issues |
| ▪ OT-102 | Occupational Performance | ▪ OT-141 | Research of Community Practice |
| ▪ OT-105 | OT Computer Applications | ▪ OT-150 | Therapeutic Use of Self |
| ▪ OT-120 | Human Occupation | ▪ OT-200 | Psychosocial Rehabilitation |
| ▪ OT-130 | OT Interventions | ▪ OT-219 | Disabilities of Development/Aging |

Additional responsibilities included:

- Academic Fieldwork Coordinator
- College Technology Committee
- College Mental Health Task Force
- Academic Advisor
- Department Appointments Committee Chair
- Curriculum design

Program Supervisor/COTA. Restoration Society, Incorporated. 1987-1996.

- Provided rehabilitation, case management and crisis intervention to diverse population of persons experiencing psychiatric disabilities, substance abuse, homelessness, poverty.
- Hired, trained, evaluated and supervised staff.
- Developed intake procedures, performed client intakes, maintained client records.
- Designed and implemented a rehabilitation readiness assessment tool used in a supported employment program for individuals with psychiatric disabilities.
- Designed and implemented Personal Development Program which offers consumers structure, and support in goal-setting, self-awareness, and environmental-awareness.
- Contributed to development of long-range and short-range agency goals and plans in conjunction with agency management/administration team.

Skills Training Specialist/COTA. Horizon Human Services, Boulevard Day Treatment Program. 1986-1987.

- Provided individual assessment, advisement and treatment-planning among persons with psychiatric disabilities.
- Facilitated group and individual instruction in social skills, wellness self-management, ADLS, IADLS.
- Developed a horticulture therapy program that focused on decision-making, social skills, and leisure skills.
- Created a client-driven newsletter that focused on environmental awareness, self-awareness, and vocational skills.
- Established a client-run small business that manufactured and marketed custom items within the agency, focusing on vocational exploration, vocational skills and self-awareness.

Rehabilitation Specialist/COTA. Restoration Society, Incorporated. 1984-1986.

- Provided direct service to persons with severe and persistent mental illness in a psychosocial clubhouse-model setting.
- Developed and managed a horticulture training program and client-operated business projects.
- Assisted mental health consumers in publishing a monthly consumer-driven newsletter.

Consulting/Contracting

Rasmussen College. 2019.

- Industry expert consultant for developing Occupational Therapy Assistant Program. Contributed to a unique distance-learning model OTA curriculum design, including course learning outcomes, program sequence, content development, and program sequence.

Baker Victory Services. 2011-2019.

- Consulted in development of web-based transition intervention services (WAY²Recovery). Train and support staff in application of person-centered planning and psychiatric rehabilitation readiness assessment and development. Assist in development of school computer accessibility plan.

Rutgers University, Department of Psychiatric Rehabilitation and Counseling Professions. 2011.

- Advised and evaluated proposal for Occupational Therapy Assistant Program. Conducted on-site review of facilities, faculty, and clinical fieldwork sites. Reviewed program design and curricula. Interviewed key stakeholders (faculty, administrators, staff, clinical affiliates, funders) and submitted final evaluation with recommendations for approval of new academic degree program.

University at Buffalo Center for Assistive Technology. 2002.

- Assisted in the development of assessment instruments for a study on assistive technology. Conducted semi-structured interviews with subjects. Contributed to data compilation and analysis.

Vocational and Educational Services for Individuals with Disabilities (now ACCESS-VR). 1996-1999.

- Developed and implemented an assessment tool used to determine re-employment readiness of individuals with disabilities. Provided individualized job placement services for difficult-to-place individuals.

V. Other Activities:

Professional Affiliations

- New York State Occupational Therapy Association (NYSOTA).
- American Occupational Therapy Association (AOTA).
- Psychiatric Rehabilitation Association (PRA).
- Consortium of Psychiatric Rehabilitation Educators (CPRE).
- OT Leaders and Legacies Society (OTLLS)

Committees and Projects

- Board Director - Haiti Rehabilitation Foundation (www.haitirehab.org), an organization that established and continues to support the first and only school in Haiti with four-year degree programs in both Physical Therapy and Occupational Therapy. 3/2021 - present.
- Planning Committee Member – American Journal of Psychiatric Rehabilitation – Workforce Development Section (in development) 2/2019 – present.
- Board Director - AOTA (<https://www.aota.org/>). 7/2019 – 6/2022.
- Education Liaison – Helping Hands and Beyond (www.helpinghandsandbeyond.org/), an organization that operates health and rehabilitation clinics in Haiti. 1/2016 – present.
- Member, OTA Honor Society Committee - OT Leaders and Legacies Society. (www.otleaders.org/). 4/2018 – present.
- Advisory Council/Conference Planning Committee – Psychiatric Rehabilitation Association (www.psychrehabassociation.org/). 2016 - 2018.
- OTA Representative to the AOTA Representative Assembly. 2015 - 6/2019.
- Board President - Restoration Society, Inc., a community mental health agency (www.rsiwny.org). 1998 - present.
- Social Media Coordinator - New York State Occupational Therapy Association (www.nysota.org). 2008 - 2015.
- Website Content Manager - National Consortium of Psychiatric Rehabilitation Educators (www.psychrehab.net). 2014 - present.

VI. Merits:

- **Jeannette Bair Writer's Award** – American Occupational Therapy Association (AOTA). April, 2021.
- **Merit Award for Service** – New York State Occupational Therapy Association (NYSOTA), Executive Board. October, 2019.
- **Award of Merit for Service** – NYSOTA Executive Board. November, 2017.
- **Professor Emeritus** – Erie Community College Board of Trustees. August 24, 2016.
- **Service Commendation** – AOTA. OTA Representative, Representative Assembly, 2015-2016. April 7, 2016.
- **Roster of Honors** – AOTA. April 5, 2014.
- **Award of Excellence** – AOTA. Awarded for "promoting occupational therapy in community mental health". April 5, 2014.
- **Service Commendation** – AOTA. Ad Hoc Committee on Health Care Reform, 2011-2013. April 5, 2014.
- **Certificate of Recognition** – NYSOTA. Executive Board. October, 2011.
- **Award of Merit for Service** – NYSOTA. Executive Board. October 2009.
- **COTA Achievement Award** – NYSOTA. Executive Board. October 2005.
- **Award of Merit for Service** – NYSOTA. Executive Board. October 2003.
- **NYSOTA Graduate Scholarship** – Niagara Frontier District of NYSOTA. 2003.
- **Grant recipient** – Rehabilitation Services Administration of the U.S. Department of Education. A \$9300 educational grant to fund my graduate studies in assistive and rehabilitation technology at the University at Buffalo. December 2000.
- **Certificate of Merit for Service** – Niagara Frontier District- NYSOTA. April 2000.
- **Professional of the Year Award** – Action for Mental Health, Inc. November, 1994.
- **Alpha Sigma Lambda** – Lambda Chapter National Honor Society. State University of New York at Buffalo. 1994
- **Graduated Cum Laude and achieved Dean's List status** all semesters at University at Buffalo. Social Sciences Department Honors – Graduate of Highest Distinction, 1994.
- **Edna Aimes Scholarship** – Mental Health Association in New York State, Inc, 1992.

VII. Scholarly Presentations:

- Merlo, David; Gitlow, Lynn, Ph.D., OTR/L, ATP; Battistella, Debra Battistella, MS, OTR/L; Hays, Maggie, MS, OTR/L; Bergé, Christy, OTS (April 2, 2022). *Maximizing Mental Health, Well-Being, & Quality of Life on College Campuses - An Opportunity for OT*. AOTA Inspire Conference, San Antonio.
- Merlo, David (April 22, 2021). *OTA Panel: Emerging OTA Career Pathways - Shifting Practice Beyond Episodic Disease Management*. Panel Presentation at AOTA Inspire Conference, Virtual.
- Merlo, David; Gitlow, Lynn, Ph.D., OTR/L, ATP (April 8, 2021). *College Student Mental Health: An Opportunity for OT*. Short Course 301 at AOTA Inspire Conference, Virtual.
- Merlo, David; Cavanaugh Sharon (June 26, 2017). *Utilizing Website Building to Develop Transition Readiness and Self-Advocacy with Youth*. Psychiatric Rehabilitation Association (PRA) Wellness and Recovery Summit, Atlanta.
- Merlo, David; Tilton, Melissa; Christenson, Barb; Goulding, Bill (March 30, 2017). *OTAs: Celebrating Our History, Ready for Our Future*. Short Course at AOTA Conference, Philadelphia.
- Merlo, David; Linkie, Christine, MS, OTR/L, CPRP; Sullivan-Soydan, Anne, ScD, CPRP (March 29, 2017). *Recovery and Psychiatric Rehabilitation: Updating OT Mental Health Practice*. Full-day Institute at AOTA Conference, Philadelphia.

- Merlo, David; Gitlow, Lynn, Ph.D., OTR/L, ATP (November 4, 2016). *Every Day Technology Interventions for People with Serious Mental Illness*. Workshop presentation at New York State Occupational Therapy Association (NYSOTA) Conference, Syracuse, NY.
- Merlo, David; Gitlow, Lynn, Ph.D., OTR/L, ATP (April 7, 2016). *Using assistive technology with people who have serious mental illness*. Short Course at AOTA Conference, Chicago.
- Merlo, David; Lazzarini, Ivelisse, OTD/OTR/L; Champagne, Tina, OTD/OTR/L; Burkhardt, Ann, OTD,OTR/L, FAOTA; Lehman, Regina, MS, OTR/L; Torcivia, Elizabeth, PhD, OTR; Esposito, Caitlin, MSOT, OTR/L (April 6, 2016). *The Road to Relevancy in Mental Health: Discussing essentials for OT/OTA accreditation, curriculum, fieldwork, clinical practice and billing*. Day Workshop at AOTA Conference, Chicago.
- Merlo, David; Cavanaugh, Sharon, BS, OTR/L (October 1, 2015). *School Work-Based Learning - Mental health and the use of Technology*. New York State Rehabilitation Association Summit and Transition Age Youth Institute. Saratoga Springs, NY.
- Merlo, David (May 15, 2014). Guest Lecture: *Utilizing Web Technology as a Creative Intervention in Occupational Therapy*. Rush University Medical Center, Occupational Therapy Department, Chicago.
- Merlo, David (April 4, 2014). MHSIS Roundtable: *Building Relationships with Outside Mental Health Agencies*. Short course presentation at American Occupational Therapy Association (AOTA) Conference, Baltimore.
- Merlo, David; Cavanaugh, Sharon, BS, OTR/L; Wynn, Heather, OTS; Manikhout, Justin (April 3, 2014). *Heads in the Clouds: Utilizing Cloud-based Technologies to Develop Transition Readiness and Self-Advocacy with Youth*. Workshop presentation at AOTA Conference, Baltimore.
- Merlo, David; Champagne, Tina; Galvin, Justin; Johnson, Marilyn; White, Suzanne (April 27, 2013). *Recovery and the National Mental Health Transformation Initiative: Promoting Leadership in Occupational Therapy Practice*. Workshop presentation at AOTA Conference, San Diego.
- Merlo, David (October 30, 2012). Guest Lecture: *Meaningful Occupation in At-Risk Children*. American International College, Occupational Therapy Department, Springfield, MA.
- Merlo, David; Cavanaugh, Sharon, BS, OTR/L; Henning, Margery, OTS (November 11, 2012). *Utilizing Website Development as an Intervention for Youth Transition and Empowerment*. Workshop presentation at New York State Occupational Therapy Association (NYSOTA) Conference, Rochester, NY.
- Merlo, David; Sheehan, Colleen, BS, CPRP; McGraw, Katherine, MS, OTR/L (November 10, 2012). *Wellness Recovery Action Planning: A self-developed guide to daily living and success and the Occupational Therapy Connection*. Workshop presentation at NYSOTA Conference, Rochester, NY.
- Merlo, David; Baughan, Kimberly; Singh, Nancy (July 17, 2012) Co-facilitator and developer. Regional Coordinator Training: *Healthcare Reform in New York State*. Webinar part of SAMHSA grant-funded project to train peers to conduct education and outreach regarding Affordable Care Act throughout New York State.
- Merlo, David (April 28, 2012). *Infusing Website Development into Academics and Fieldwork Coordination*. "Technology Day" presentation at AOTA Conference, Indianapolis.
- Merlo, David (October 14, 2011). *OT Collaboration in a Transdisciplinary Universe*. Presentation at University at Buffalo School of Public Health and Health Professions, Department of Rehabilitation Science - Seminar Series.
- Lead organizer of Consortium of Psychiatric Rehabilitation Educators (CPRE) Symposium 2011, Buffalo, September 30 - October 2, 2011.
- Merlo, David; Champagne, Tina OTD, OTR/L, CCAP (June 16, 2011). *When Parallel Worlds Merge: Occupational Therapy and Psychiatric Rehabilitation in a Transdisciplinary Universe*. United States Psychiatric Rehabilitation Association (USPRA) Conference/OT Symposium, Boston.

- Bursen, Katherine, MS, OTR/L, CPRP, David M. Merlo, MS, COTA, CPRP, Roseanna Tufano LMFT, OTR/L, Tina Champagne, OTD., OTR/L, CCAP (April 14, 2011). *Infusing the New Mental Health Knowledge and Skills Requirements into OT and OTA Educational Programs*. Workshop presentation at AOTA Conference, Philadelphia.
- Merlo, David. (November 13, 2010). *Infusing Website Development into Academics and Fieldwork Coordination: Easy High Tech on Shoe-string Budget*. Workshop presentation at NYSOTA Conference, Columbia University Medical Center, NYC.
- Merlo, David. (October 24, 2009). *Re-Entry Support and Jail Diversion Services as Part of Mental Health Recovery*. Panel presentation at Re-Entry Support in Western New York Conference, sponsored by Action for Mental Health Inc., American Association of University Women, League of Women Voters, Erie Community College - City Campus, Buffalo, NY.
- Merlo, David; Smith, Sarah. (July 1, 2009). *Occupational Therapy & Psychiatric Rehabilitation: A Natural Partnership*. Poster session presented at the 34th Annual USpra Conference, Norfolk, VA.
- Merlo, David; Bernacchio, Charles; Welkowitz, Julie. (June 16, 2008). *Strategies for Engaging Students: Comprehending, Applying, and Analyzing Evidence-Based Methods of Teaching in Psychiatric Rehabilitation College Education*. Workshop session presented at USpra Conference, Metro Chicago, IL

VIII. Scholarly Publications:

- Technology Interventions for Individuals with Mental Health Conditions. (January, 2020) *OT Practice*. Gitlow, Lynn; Merlo, David.
- Assisting Transition through Website Building. *AOTA OT Practice Special Interest Section Newsletter* (November 2016) Cavanaugh, Sharon; Merlo, David; Griffo, David; Cosmas, Jayani.
- The Force of Habit – Creating and sustaining a wellness lifestyle. *Journal of Psychosocial Nursing* Vol 53, No. 9, 2015. Nemecek, Patricia; Swarbrick, Margaret; Merlo, David.
- Occupational Therapy's Role in Transitions (Module 4 Mental Health) PowerPoint Presentation available at: <http://www.aota.org/practice/children-youth/transitions/powerpoint.aspx>, Contributing authors: Schweitzer, Jo; Merlo, David.
- Computer Assistive Technology: Opportunity knocks for OTAs working in schools. (November 7, 2005) *OT Practice*, 10(20).