

# DAVID MERLO

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I am a leader / educator / advocate / practitioner passionately committed to enabling all people the opportunity to improve their health and wellbeing, live self-directed lives, be integrated and contributing members within the communities of choice, and strive to reach their full potential (SAMHSA Working Definition of Recovery, 12/10/11).

## EXPERIENCE

### MAY – PRESENT

#### **MANAGING DIRECTOR**, RESTORATION SOCIETY, INC.

Restoration Society, Inc. (RSI) is a peer operated community mental health agency offering recovery-based mental health services in Western New York.

#### **Quality Assurance:**

- Ensuring a properly oriented and trained workforce throughout the organization.
- Ensuring directors, managers and middle managers are well oriented, trained and supported in order to comply with policies, achieve outcomes and facilitate agency values and philosophy with all employees as paramount importance in the delivery of services all services.
- Developing and implementing methods to solicit customer and employee feedback and satisfaction. Evaluating the same and working with customer and staff teams to implement corrective methods.
- Developing and implementing methods to evaluate agency and employee compliance of various agency procedures and/or policies to ensure the agency maintains the highest level of integrity and quality in service delivery and to minimize risk and liability across the company. in order understanding and follow-through.

#### **Strategic Planning:**

- Assist with the development and oversight of strategic planning (Board of Directors and Agency).
- Strategic planning for what we are, who we serve, what we do, why we do it.
- Assist in planning and inspiring set priorities which will determine the focus of energy and resources.
- Strengthen operations, ensure employees and other stakeholders are working toward a common goal, establish agreement around intended outcomes, assess and adjust the direction in response to a changing environment.

#### **Special Projects:**

- Organize, lead and help execute company projects.
- Identify and develop innovative opportunities and new collaborations.
- Keeps the pulse on upcoming trends in the field and ensures the agency is well positioned relative

## **JANUARY 1996 – JUNE 2014**

### **PROFESSOR EMERITUS, ERIE COMMUNITY COLLEGE**

Professor and academic fieldwork coordinator for accredited occupational therapy assistant program.

- Liaised with hospitals, clinics, schools, and community programs to develop and sustain high quality experiential fieldwork placements for all students.
- Taught courses focusing on mental health, psychiatric rehabilitation, psychology, assistive technology, and occupational therapy interventions.
- Supported student retention and success through strength-based, person-centered student advisement.

## **JUNE 1987 – JANUARY 1996**

### **PROGRAM SUPERVISOR, RESTORATION SOCIETY, INC.**

Developed and grew a clubhouse-model program, providing recovery-oriented services to people with severe mental illness.

- 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 offered consumers collaborative support in goal setting, self-awareness, environmental-awareness.
- Contributed to development of long-range and short-range agency goals and plans in conjunction with agency management/administration team.

## **CONSULTING/CONTRACT WORK**

### **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. 2011-2018.**

- Consulted in development of web-based transition intervention services (WAY2Recovery). Trained and supported staff in application of person-centered planning and psychiatric rehabilitation readiness assessment and development. Developed a unique approach to engage students in creating personal websites as a process to develop school transition plans (IEP). This approach was presented at state and national conferences as well as published in a scholarly publication.

### **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.

## EDUCATION

- **MS Adult Education**, Buffalo State College. 2006.
- **Advanced Graduate Certificate in Assistive and Rehabilitation Technology**, University at Buffalo. 2003.
- **BA Health and Human Services – Community Mental Health**, University at Buffalo. 1994.
- **Certificate in Psychiatric Rehabilitation**, Boston University Center for Psychiatric Rehabilitation. 1989.
- **AAS Occupational Therapy**, Erie Community College. 1984.
- **AAS Horticulture/Landscape Design**, Alfred State College. 1979.

## STRENGTHS

- I inspire others through my own passion
- I live and breathe recovery values and principles and lead others based on those values
- I build and facilitate broad professional networks and use those networks to collaborate
- I effectively teach and facilitate learning utilizing best practices and educational technology
- I deeply and critically analyze organizational strengths, weaknesses, opportunities, and threats
- I innovate creative and effective solutions to meet customer needs and expectations, as well as market forecasts and trends
- I build respectful collaborative relationships and teams.

## PROFESSIONAL SERVICE

- **Board Director - Haiti Rehabilitation Foundation** ([www.haitirehab.org](http://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 - American Occupational Therapy Association** ([www.aota.org](http://www.aota.org)), the national professional organization representing 60,000+ OT practitioners. Lead member of governance enhancement committee and Diversity Equity and Inclusion Taskforce. Managed fiduciary and organizational challenges resulting from the COVID-19 pandemic, including national conference contingency planning. 7/2019 – 6/2022.
- **Education Liaison - Helping Hands and Beyond** ([www.helpinghandsandbeyond.org](http://www.helpinghandsandbeyond.org)), an organization that operates health and rehabilitation clinics in Haiti. 1/2016 – present.

- **Committee Member - OTA Honor Society Committee, OT Leaders and Legacies Society.** ([www.otleaders.org](http://www.otleaders.org)), an organization representing OT practitioners who demonstrate leadership through service in a variety of civic and professional organizations. 4/2018 – present.
- **Advisory Council/Conference Planning Committee - Psychiatric Rehabilitation Association** ([www.psychrehabassociation.org](http://www.psychrehabassociation.org)). 2016 - 2018.
- **OTA Representative - AOTA Representative Assembly.** 2015 - 6/2019.
- **Board Director - Restoration Society, Inc.** ([www.rsiwny.org](http://www.rsiwny.org)), a peer operated mental health agency that offers recovery-based person-centered services. 1998 - present.
- **Social Media Coordinator - New York State Occupational Therapy Association** ([www.nysota.org](http://www.nysota.org)). 2008 - 2015.
- **Content Manager - National Consortium of Psychiatric Rehabilitation Educators** ([www.psychrehab.net](http://www.psychrehab.net)). 2014 - present.

## AWARDS

- **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 Awardee** - 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.
- **Edna Aimes Scholarship** - Mental Health Association in New York State, Inc, 1992.

# SCHOLARSHIP

## 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). Everyday 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 (April 4, 2014). MHSIS Roundtable: Building Relationships with 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; 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 (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.

## 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. Nemeck, Patricia; Swarbrick, Margaret; Merlo, David.
- Computer Assistive Technology: Opportunity knocks for OTAs working in schools. (November 7, 2005) *OT Practice*, 10(20).