Behavioral Health Workforce Development

Peer Workforce Investment (PWI) ROUND 2

Request for Applications (RFA) Released
February 28, 2023

Application Due Date: April 11, 2023
5 p.m. Pacific Time

Advocates for Human Potential, Inc. (AHP),
funded by the California Department of Health Care Services (DHCS)
Community Services Division

DHCS
CALIFORNIA DEPARTMENT OF
HEALTH CARE SERVICES

AHP
Advocates for
Human Potential, Inc.
Real World Solutions for Systems Change

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Funding Opportunity at a Glance

Who: Behavioral health peer-run nonprofit (501(c)(3)) organizations authorized to do business in California that have provided behavioral health services, including either direct or indirect peer services, for an uninterrupted period of no less than two years prior to June 1, 2023. If the COVID pandemic and shutdowns caused delays in service, providers must have two years of service prior to the start of the March 2020 public health emergency.

What: Expand behavioral health peer-run organizational capacity to provide peer services for mental health and substance use disorder (SUD) recovery supports and behavioral health services by providing up to $500,000 per selected applicant organization responding to this RFA. Eligibility details are described on page 9.

When: This application is due on **April 11, 2023, at 5 p.m. PST.** Funding begins on June 1, 2023, and ends on December 31, 2024. Other notable deadlines are listed in the blue box to the right.

Where: Peer services are needed throughout California. A goal of this project is to work toward making behavioral health peer services available in every county and community. The immediate priority is to ensure high-quality services in underserved and high-need communities, including programs that offer bilingual and cultural expertise and those in rural settings.

> **IMPORTANT DATES***
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> **RFA Released**
> February 28, 2023
>
> **Informational Webinar**
> March 8, 2023
> 12-1 p.m. PT
>
> **Question Submittal Deadline**
> March 15, 2023
>
> **Application Deadline**
> April 11, 2023
> 5 p.m. PT
>
> **Projected Award Announcement**
> May 19, 2023
>
> **Welcome & Orientation Webinar**
> June 6, 2023
>
> *These dates are subject to change. Attend the informational webinar on March 8 to be enrolled for updates.*

Why: The PWI, Round 2 grant provides a rare opportunity to invest in behavioral health peer-run programs' capacity and infrastructure to "set the table" for the future Medi-Cal peer support services benefit. The purpose is not only to increase the number of behavioral health peers, but also to develop peer-run programs' staff competence, certification, and capacity for increased service volume and collaboration with other provider types.

How: Community-based peer-run organizations will receive funding that can be used for staff working directly on the project, supplies, limited capital improvements, workforce development, and other start-up and specified costs. Agreements are subject to the approval of AHP as authorized by DHCS.

Introduction

This funding is part of the Behavioral Health Workforce Development (BHWD) effort. This RFA contains important information about the PWI, Round 2 project, including background; legal, fiscal, and program requirements for applicants; as well as eligibility criteria and application instructions.

About the BHWD Initiative

DHCS is committed to statewide expansion of the behavioral health peer-run workforce to improve consumer access to, and productive participation in, behavioral health services throughout the state. As part of this effort, DHCS is making changes in Medi-Cal funding to permit billing for certified peer specialists. This RFA was developed to help ensure that peer-run programs are ready to take advantage of this new and ongoing funding source. AHP has been contracted to implement the BHWD Project, which includes support for the work of this RFA, PWI, Round 2.

California's peer-run behavioral health programs are well positioned to support the overall expansion of the state's behavioral health workforce through their pivotal role of facilitating access to care, retention of services, delivery of recovery supports, and advocacy for fellow consumers throughout recovery.

Through program expansion and enhanced collaboration with health, social services, and other systems, peer-run programs can help California move closer to its goal of equity in behavioral health services throughout every county in the state.

Goal

The overarching goal of BHWD is to expand, elevate, enhance, and empower behavioral health peer-run programs in every California community. Through this PWI, Round 2 RFA, AHP will award grants to do the following:

- Expand peer-run behavioral health programs' staffing and capacity.

- Elevate the profile of behavioral health peer-run programs with other entities in communities and statewide through outreach and collaboration.

- Enhance the quality of peer-run programming through education, training, and improved monitoring and supervision.

- Empower peer-run programs to realize full potential, including through organizational capacity building, strategic planning, and management support.

For purposes of this RFA, a peer is defined as an individual who has self-identified as having lived experience with the process of recovery from mental illness, SUD, or both, either as a consumer of services related to these conditions, or as a parent/caregiver or family member. Peers with direct lived experience typically support other individuals with direct experience, and family/caregiver peers typically interact with and support other family/caregivers.

Objectives

California's peer-run behavioral health programs are critically positioned to support the overall expansion of the state's behavioral health peer-run workforce through their pivotal role of facilitating access to care, supporting retention in services, and advocating for others in their recovery process. Through program expansion and enhanced collaboration with health and social services and other systems, peer-run programs can help move California closer to its goal of equity in behavioral health services in every community.

To help achieve these overarching goals, the PWI, Round 2 grant has four interrelated objectives:

Objective 1. Expand the number of mental health and SUD peer staff through increased and targeted recruitment, including strategies to recruit peers in communities of Black, Indigenous, and Person of Color (BIPOC) and bilingual peers; training and education; and establishment of livable wages through salaries and viable career paths, and/or stipends for peers in training.

Objective 2. Improve access to behavioral health peer support services for individuals with SUD and mental health challenges, including expansion of referral patterns and pathways from hospitals, emergency departments (EDs), correctional facilities, SUD treatment programs, collaborative treatment courts, and other key partners, and through increased outreach efforts through multifaceted engagement approaches, including in-person, online, via telehealth and apps, and other strategies.

Objective 3. Expand peer-run programs' information technology (IT) and telehealth infrastructure. Expansion efforts could include purchase of equipment (i.e., laptops, tablets, desktop computers, computer monitors, webcams, cell phones, modems, wireless routers, hot spots, provider kiosks, data terminal and computer network equipment), as well as software licenses, internet subscriptions (e.g., broadband) and telehealth training.

Objective 4. Implement activities to develop peer-run programs' capacity and infrastructure in preparation for the new Medi-Cal peer support services benefit, including minor remodeling of facilities, purchase of office equipment, furnishings, modular offices, telephone networks, copying and printing equipment, office/facility/clinical supplies, office equipment, and staff training.

PWI, Round 2 Funding Opportunity

RFA Overview

Through this RFA, AHP, on behalf of DHCS, seeks to identify grantees to expand behavioral health peer-run programs throughout California. Applicants with 49 or fewer employees may apply for up to $375,000 and applicants with 50 or more employees may apply for up to $500,000 for a 19-month period of performance commencing June 1, 2023, and ending December 31, 2024.

PWI, Round 2 funds may be used to expand behavioral health peer-run programs as described in the above objectives (see page 5).

This PWI, Round 2 grant provides a rare opportunity to invest in behavioral health peer-run programs' capacity and infrastructure to "set the table" for the future Medi-Cal peer support services benefit. The purpose is not only to increase the number of behavioral health peers, but also to develop peer-run programs' staff competence, certification, and capacity for increased service volume and collaboration with other provider types.

AHP is seeking applications from behavioral health peer-run programs, with special interest in receiving applications from programs reaching underserved communities, including programs that offer bilingual and cultural expertise and programs in rural settings.

All funds must be expended by December 31, 2024. There is no rollover. All unused funds will be forfeited by the grantee. It is critical for applicants to develop realistic projects that can achieve project objectives and expend full budgets within the 19-month grant period.

Funding Information and Project Timeline

PWI, Round 2 grants will be awarded in amounts up to $375,000 to programs with 49 or fewer employees and up to $500,000 to programs with 50 or more employees per program site for a 19-month period ending December 31, 2024.

- Contracts will cover activities for the following period: June 1, 2023, through December 31, 2024. Due to federal restrictions, carry-over of funds is not allowable. Any funds not used by December 31, 2024, will be forfeited.

- Funding may be used for staff working directly on the project, supplies, limited capital improvements, workforce development, and other start-up and specified costs. Agreements are subject to the approval of AHP as authorized by DHCS.

- Applicants are required to adhere to the budget guidelines included in this RFA and must submit a proposed budget using the budget template included in the online application. Applications that do not conform to this template will not be considered. All items budgeted must be inclusive of all costs, including taxes and fees in U.S. dollars.

Following a technical review and scoring of each application, budgets will be reviewed to ensure costs are allowable, reasonable, and linked to the described objectives. Only applicants that meet these criteria will be considered for funding. Funding awards are merit-based with no guarantee that applicants will be awarded the full requested amount.

Applicants are required to submit a budget to assist the application review team in establishing cost reasonableness for specified deliverables in the final fixed price amount awarded to the site. Grantees will be paid 50 percent of the full first quarter

payment deliverable amount as soon as the contract is executed. Subsequent quarterly payments will be made at the beginning of the following quarter, contingent on the submission of quarterly data and quarterly reports that detail successful progress toward and completion of deliverables.

Applicants must abide by standard funding restrictions as determined by DHCS and as described on pages 8-9 of this RFA.

Use of Funds

A portion of funds must be used for a PWI Project Coordinator whose responsibilities include the coordination of submissions of data, reports, and invoices on a quarterly basis, as well as updates of project points of contact, ensuring attendance at mandatory PWI events, use of the Grantee Request Form for Technical Assistance and Training and other requests, and PWI website login management. Grantees with more than one BHWD grant award are strongly encouraged to ensure that the Project Coordinator is a different person for each BHWD project for which the agency is funded. The Project Coordinator must be a 1.0 full-time equivalent (FTE) employee. Funds may also be used for a wide range of activities that address the project objectives. Below are some examples of activities that DHCS seeks to fund:

- Licenses or purchase of online data management platforms for ease of electronic note taking, referral system management, participant attendance, service tracking, and other record-keeping to support best practices and community standards of care.

- Improvement of peer-practice delivery systems, including the purchase of software and hardware (laptops, desktops, tablets, etc.) to enable or improve the support of people and record management services.

- Staff training in areas related to behavioral health peer-run program best practices.

- Recruitment and training of peer staff, especially those who are bilingual and/or BIPOC.

- Development of outreach, training, mutual referral patterns, and opportunities to collaborate with other systems, including medical and social services (including housing), law enforcement and judicial systems, to educate them about the availability and benefits of engaging with peer supports for the organization's demographic.

- Minor facility remodeling necessary for improved behavioral health peer-run program functioning and improved care, including items such as a modular office installation, Americans with Disabilities Act compliant entries, new signage, and furnishings.

- Development of new print or online educational materials for relevant groups

about the availability of behavioral health peer-run program services at the awardee's location.

- IT and telehealth infrastructure and equipment, including cell phones, hot spots, provider kiosks, internet subscriptions, etc.

NOTE: Successful applicants must meet federal and state funding restrictions, reporting, and compliance requirements noted later in this RFA.

Funding Restrictions

DHCS will not fund the following:

- Debt retirement.

- Operational deficits.

- Partisan activities.

- Religious organizations for explicit religious activities.

- Activities that exclusively benefit the members of sectarian or religious organizations.

- Purchase or lease of vehicles.

- Purchase or improvement of land.

- Purchase, construction, or permanent improvement (other than minor remodeling) of any building or other facility or purchase of major medical equipment.

- Out-of-state travel.

Only organizations using the de minimis rate of 10 percent of modified total direct costs, as defined in 45 CFR Part 75, will be selected for this funding opportunity.

Funds shall not be used for services that can be supported through other accessible sources of funding, such as other federal discretionary and formula grant funds (e.g., U.S. Department of Health and Human Services [HHS], Centers for Disease Control and Prevention, Centers for Medicare & Medicaid Services, Health Resources and Services Administration and Substance Abuse and Mental Health Services Administration [SAMHSA]), Department of Justice (Office of Justice Programs/Bureau of Justice Assistance) and nonfederal funds, third-party insurance, and sliding scale self-pay, among others.

SAMHSA funds were granted to DHCS, and all funding restrictions are applicable to this funding opportunity and all grant contracts.

The HHS codified the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for HHS Awards, 45 CFR Part 75. All components of 45 CFR Part 75 are applicable to all subgrantees. In Subpart E, cost principles are described and allowable and unallowable expenditures for HHS recipients are delineated. Information on 45 CFR Part 75 is available at http://www.samhsa.gov/grants/grants-management/policies-regulations/requirements-principles.

PWI, Round 2 funds must be used for purposes supported by the program and may not be used to exceed the salary limitation. The Consolidated Appropriations Act, 2014 (Pub. L.113-76) limited the salary amount that may be awarded and charged to SAMHSA grants and cooperative agreements. Award funds may not be used to pay the salary of an individual at a rate in excess of Executive Level II. The Executive Level II salary can be found in SAMHSA's standard terms and conditions for all awards at https://www.samhsa.gov/grants/grants-management/notice-award-noa/standard-terms-conditions. This amount reflects an individual's base salary exclusive of fringe and any income that an individual may be permitted to earn outside of the duties of the Applicant. This salary limitation also applies to subcontracts/subgrants under a SAMHSA grant or cooperative agreement.

Unless superseded by program statute or regulation, follow the cost principles in 45 CFR Part 75 and the standard funding restrictions listed previously.

Eligibility Criteria

Behavioral health peer-run programs that meet all the following criteria are encouraged to apply:

- Are located and provide services in California.

- Have valid nonprofit status (501(c)(3)) as of 2021.

- Are peer-run, defined as a program or organization that employs at least 51 percent of staff as peers with full-time equivalent status, including management and board members.

- Have provided behavioral health services, including either direct or indirect peer services, for an uninterrupted period of no less than two years prior to June 1, 2023. If the COVID pandemic and shutdowns caused delays in service, providers must have two years of service prior to the March 2020 start of the public health emergency.

An applicant entity must submit one application for funds to be used at one distinct behavioral health peer-run program location. If an entity wishes to apply for funding at multiple sites, they must submit one application per site. Any application that seeks funding for more than one site will be rejected.

Application Priority Scoring

Priority will be given to behavioral health peer-run programs with the following characteristics:

- Operates in regions with high rates of SUD, overdose, suicide, and attempted suicide, and/or in underrepresented, vulnerable, and/or underserved communities, as evidenced by the project description in section one of the application, and plans to concentrate outreach to people with high need.

- Has underdeveloped referral pathways or no developed referring patterns from sites with high need (i.e., homeless shelters, treatment programs, hospitals, jails, EDs, treatment courts) and project plans to focus on improved community collaboration and mutual referral development.

Grant Requirements and Mandatory Participation

Grantees must participate in coaching and training opportunities that enhance the quality of the behavioral health peer workforce and enhance organizational capacity. These opportunities will be specified by AHP throughout the grant period with DHCS authorization and at a minimum will include the following:

Learning Collaboratives

Grantees will be required to participate quarterly in Learning Collaborative (LC) meetings that will be convened by grantee regional locations in California to promote regional networking and collaboration. The LCs will all be held online (virtually), with an expected two-hour minimum per LC. At least two grantee staff members must attend each LC meeting.

Webinars

Grantees must agree to participate in webinars on a minimum quarterly basis and up to a monthly cadence.

Coaching Calls

In addition to the LC meetings and webinars, grantees will participate in at least monthly coaching calls with a Grantee Coach to support the successful rollout of Implementation Plans, ensure grantee compliance with the Scope of Work (SOW), participation in trainings, and provision of necessary tailored technical assistance.

In-person site visits may also be scheduled by the Grantee Coach and/or technical assistance and training personnel to help ensure grantees' success and compliance with the goals of PWI.

42 CFR Part 2

Selected applicants shall comply with the regulations set forth in 42 CFR Part 2, to

ensure maintenance of the appropriate data protocols as part of infrastructure development and staff training, including the responsibility for assuring the security and confidentiality of all electronically transmitted patient material. Applicants should review the 42 CFR Part 2 privacy and the SAMHSA confidentiality rules at https://www.samhsa.gov/sites/default/files/how-do-i-exchange-part2.pdf. Applicants selected for funding must commit to operate in compliance with the regulations.

Data and Reporting Requirements

Grantees shall comply with the regulations set forth in 42 CFR Part 2, including the responsibility for assuring the security and confidentiality of all electronically transmitted patient material, including the Health Insurance Portability and Accountability Act (HIPAA) privacy and SAMHSA confidentiality rules, and a commitment to operating in compliance with the regulations. Grantees shall comply with any federal or state data reporting requirements.

Quarterly Progress and Data Reports and Final Report

Grantees must submit quarterly progress and data reports responding to the performance measures identified in the SOW as specified by AHP. Potential performance measures may include, but are not limited to, the following:

- Number of individuals experiencing behavioral health (mental health and SUD) conditions served or impacted by the behavioral health peer-run program expansion funds.

- Number of persons served in the peer-run facility.

- Of the individuals served, percent (%) who received peer support services.

- Number of peer staff hired, trained, and Medi-Cal certified according to the statewide standards promulgated by California Mental Health Services Act.

- Demographic data of peer staff:

    o Number of peer staff who are aged 17 and under, 18-24, 25-44, 45-64, 65 and over, and unknown.

    o Number of peer staff who are male, female, transgender, nonbinary, genderqueer, or unknown.

    o Number of peer staff who are African American/Black, American Indian/Alaska Native, Asian, Native Hawaiian/Pacific Islander, White, Other, or unknown.

    o Number of peer staff who are Latinx, Chicanx, or Hispanic; not Latinx, Chicanx, or Hispanic; or unknown.

- o Number of peer staff who are fluent in one or more non-English languages.

- ▪ Demographic data of people served:

    - o Number of clients receiving peer support services who are aged 17 and under, 18-24, 25-44, 45-64, 65 and over, and unknown.

    - o Number of people receiving peer support services who are male, female, transgender, nonbinary, genderqueer, or unknown.

    - o Number of people receiving peer support services who are African American/Black, American Indian/Alaska Native, Asian, Native Hawaiian/Pacific Islander, White, Other, or unknown.

    - o Number of people receiving peer support services who are Latinx, Chicanx, or Hispanic; not Latinx, Chicanx, or Hispanic; or unknown.

    - o Number of people receiving peer support services who speak a language other than English at home.

Performance measures may be augmented and revised as needed to address current situations and high-priority topics.

Progress reports will follow the below timeline.

Quarter	Reporting Period	Quarterly Report Due
1st Quarter	6/1/23 – 9/30/2023	10/15/2023
2nd Quarter	10/1/2023 – 12/31/2023	1/15/2024
3rd Quarter	1/1/2024 – 3/31/2024	4/15/2024
4th Quarter	4/1/2024 – 6/30/2024	7/15/2024
5th Quarter	7/1/2024 – 9/30/2024	10/15/2024
6th Quarter	10/1/2024 – 12/31/2024	1/15/2025

Grantee Billing and Payment

Contingent on funds being made available to AHP by DHCS, grantees will be awarded on a deliverable-based contract. Both grantee invoicing and payments will be based on contract-specified deliverables (not itemized invoices). To support grantees' need for funds to begin PWI programming as soon as possible, grantees may invoice for 50

percent of the first quarter budget upon contract execution and the remaining 50 percent upon demonstrating completion of or successful progress toward first quarter deliverable tasks. Deliverable-based contracts mean that grantees must demonstrate progress on agreed-upon tasks in the SOW and the data reporting of process measures (e.g., number of staff and peers trained) and service measures (e.g., number of unique people receiving peer services) on a quarterly basis to have quarterly invoices approved for payment. No itemized invoices are required. However, programs must maintain auditable financial records demonstrating appropriate use of funds with frequent monitoring of grantee appropriate use of award spend-down over the course of the grant period.

All grantee awarded funds must be expended no later than December 31, 2024.

Application Instructions

The PWI, Round 2 RFA application process is contained in an online fillable form that applicants are encouraged to review and print before beginning. Although the application is streamlined, you must consider:

- Does the behavioral health peer-run program site meet the Eligibility Criteria described on page 9?

- Can the behavioral health peer-run program help achieve the BHWD Objectives listed on page 5?

- Does the peer-run organization have the capacity to appropriately manage the funding amount the organization is planning to request?

- The application may be given priority scoring if the project is characterized by elements described on page 10.

Online Application

The PWI, Round 2 online application must be completed in full and submitted by 5 p.m. Pacific Time on April 11, 2023, at https://buildingcaldata.smapply.us/prog/peer_workforce_investment_pwi_round_2

Instructions to complete the fillable form are included in the online application. NO ATTACHMENTS ARE PERMITTED AS PART OF THIS APPLICATION. Applicants will be able to work on the online application, save work, and return to it. However, once submitted, no further changes can be made to the application. Upon submission, applicants will receive an email confirming receipt of the application.

It is the applicant's sole responsibility to ensure that the application has been successfully submitted and received.

Application Components

The online application includes five (5) components. Your responses to these application components will be used in the project application scoring and selection process. The scoring criteria is described on page 17 of this RFA.

1. The behavioral health peer-run program description (25 points)

Provide the following information about the program:

Application Resource Box

Join us for an informational webinar

March 8, 2023, from 12 p.m. to 1 p.m. PT to learn more about the PWI, Round 2 RFA and ask questions.

Register for the webinar at https://us06web.zoom.us/webinar/register/WN_pK3HrFTySFWauhoiYyaGhw

For additional questions, email: ca_bhwd@ahpnet.com

All questions must be received by March 15, 2023. Answers to all questions received by that date will be sent to all who attended the informational webinar and/or submitted questions.

- Infrastructure, such as: operates from a physical building or virtually; has administrative and operational protocols, policies, and procedures; has training and supervisory structures; has information and data systems; has quality assurance systems, etc.

- Service provision, such as: types of services provided and annual average number of individuals served per service type, etc.

- Staffing, such as: number of full-time and part-time peer staff; volunteer peer and paid peer staff; number of full-time and part-time non-peer staff; demographics (including ages, language(s), ethnic and racial identity, etc.); priority population(s) served, including demographics (ages, language(s), ethnic and racial identity, etc.).

- Need for peer-recovery support services in the community, such as overdose rates in the community (see https://skylab.cdph.ca.gov/ODdash/?tab=Home), and other relevant information to this funding request.

2. Proposed PWI project (25 points)

- What will the funding be used for? Please ensure that the proposed expansion activities have buy-in from the organization, as well as key stakeholders if relevant, and are ready for immediate implementation.

- Refer to BHWD Objectives on page 5 and Use of Funds on pages 7-8 for examples of activities that can be supported with PWI, Round 2 funds and demonstrate an understanding of DHCS intended use of this funding.

3. Quarterly project implementation plan and associated deliverables (20 points)

- Describe what activities the program will perform in Q1 – Q6 (June 1, 2023 – December 31, 2024) to achieve the project's objectives. These do not need to be exact but must demonstrate the program's concrete plan for incorporating proposed activities into the organization's current workflow.

- Use SMART Goals (Specific, Measurable, Achievable, Relevant, and Time-oriented) to specify how the organization will implement the project.

- Describe planned deliverables for each quarter. A project many have multiple deliverables in each quarter, and some may carry over from quarter to quarter. These will be the basis for the SOW in the grant award. For example, if an organization proposes to recruit new bilingual staff as part of the project, the description should include how many staff will be recruited, the duration of this activity (start to finish), where it will take place, why this is staff is needed, and how they will contribute to the agency's expanded workforce and capacity to engage new people.

4. Project staffing and capability to achieve objectives (15 points)

- Who and what will be funded by the proposed project? If salaries are to be funded, the organization should identify staff that will help implement the project and the estimated percent time of FTE that will be allocated to the PWI tasks. If contractors or consultants will be used, organizations should identify what functions/roles they will fulfill to help achieve the project objectives.

- If an organization proposes to support staff with PWI, Round 2 funds, keep in mind that existing support cannot be supplanted with these funds.

5. Project itemized budget (15 points)

- Describe personnel and contractor/consultant costs, along with other direct and indirect expenses, in the online budget template.

- Describe anticipated quarterly expenses that pair with the deliverables for purposes of billing and receipt of payment on a quarterly fixed price basis.

Applicants are encouraged to write out answers on the worksheet provided and copy and paste the answers into the fillable application form whenever possible to make the application process as easy as possible.

NOTE: There are strict word limits for each section. It is acceptable to use bullets, lists, and incomplete sentences to streamline the application and the application review process to facilitate a quick turnaround from application receipt, to scoring, to award announcement, to project initiation and funding.

Application Scoring

Section I: Behavioral Health Peer-Run Program Description — Rating Factors (25 pts)
1. How well is the applicant's current infrastructure and staffing capacity described? For example, what services are offered now? How are they connected (or not) to other services in their community? (Note: a lack of connection is not a reason to be denied funding.)
2. How well does the applicant describe the availability of services, or lack thereof, in their catchment area overall? What is the need for peer services in their community? Are they in a high-need community? For example, is the incidence of overdoses or survivors of suicide high in their service area?
3. How well does the applicant describe the priority population? Who are the people being served? For example, do they focus on a specific age group or self-identified group at high risk (e.g., LGBTQIA+, veterans, etc.)?
4. Does the applicant provide other relevant information about their program? For example, are they located at a physical site in the community, do primarily street outreach with an off-location office, etc.?
Section II: Proposed PWI Project Description — Rating Factors (25 pts)
5. To what extent does the applicant clearly describe their proposed project?
6. To what extent does this project align with the goals and objectives of BHWD funding to support California's behavioral health workforce expansion overall?
Section III: Quarterly Implementation Plan and Quarterly Deliverables — Rating Factors (20 pts)
7. To what extent does the applicant describe their quarterly activities and related deliverables?
8. To what extent does the applicant use SMART Goals (Specific, Measurable, Achievable, Relevant, and Time-Oriented) to describe their project implementation?
9. To what extent does the applicant provide a clear, logical, and achievable implementation plan overall? Do the activities described for all six quarters achieve the goals of their overall project?
Section IV: Staffing and Capability — Rating Factors (15 points)
10. How well does the applicant describe who will be responsible for implementing the project? For example, if more than one staff or consultant will be funded, are the roles and functions of these personnel specified and tied to the completion of the implementation plan?
Section V: Itemized Budget — Rating Factors (15 pts)
11. Using the fillable budget form, to what extent does the applicant describe their expected expenses, including personnel, consultants, indirect expenses, capital expenditures, fees, registration costs, travel expenses, etc., and pair these quarterly activities with related deliverables for each quarter? (Grantees will be paid based on quarterly reports of deliverables and progress toward deliverable completion.)

Application Template and Worksheet for the Online Application

The online application includes the following pages for you to complete. THIS IS A WORKSHEET, NOT THE REAL APPLICATION.

1. Program Information and Site Description

Behavioral Health Peer Run Program Applicant Information	
Agency Name	
Street Address	
City, County, State, ZIP	
Email Address	
Telephone Number	
Website Address	
Specific Program Location and Authorized Program Representative	
Representative Name (authorized to submit application)	
Title	
Mailing Address	
City, County, ZIP	
Email Address	
Telephone Number	
City/Town/County(ies) catchment areas	
Applicant Tax ID #	
DUNS #	
Congressional District of applicant organization's primary location	
Congressional District(s) where organization's primary beneficiaries live	

Applicant's annual budget amount average over past three years

Does the applicant organization have an annual financial audit? ☐ Yes ☐ No

By checking the box below, I verify that the agency listed above has attained 501(c)(3) status in California and is currently operating under this tax status. ☐

Is the program operating within a highly affected SUD/overdose geographic area and/or a particularly underserved community? ☐ Yes ☐ No

Description of catchment area served by the peer-run program in regard to SUD and mental health rates, behavioral health needs, and other relevant characteristics of the community. Please estimate the racial and ethnic populations that will be affected, providing a best estimate of the percentage of ethnic/racial communities served (including Black/African American, Indigenous American or Alaska Native, Asian, Latinx, Chicanx or Hispanic, Native Hawaiian or Pacific Islander, White, Other). (response limited to 500 words)
Insert description here

2. Peer Workforce Investment Project Description

What activities is the organization requesting funding for? (response limited to 500 words)
List proposed activities (for example: specific infrastructure development, staff development, and peer recruitment, outreach, etc.) and expected outcomes of these activities after the close of grant funding.

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3. Quarterly Project Implementation Plan and Deliverables

Quarter 1: Project Implementation Activities and Deliverables
(Use SMART objectives format) (response limited to 500 words)

Insert text here.

Quarter 2: Project Implementation Activities and Deliverables
(Use SMART objectives format) (response limited to 500 words)

Insert text here.

Quarter 3: Project Implementation Activities and Deliverables
(Use SMART objectives format) (response limited to 500 words)

Insert text here.

Quarter 4: Project Implementation Activities and Deliverables
(Use SMART objectives format) (response limited to 500 words)

Insert text here.

Quarter 5: Project Implementation Activities and Deliverables
(Use SMART objectives format) (response limited to 500 words)

Insert text here.

Quarter 6: Project Implementation Activities and Deliverables
(Use SMART objectives format) (response limited to 500 words)

Insert text here.

4. Project Staffing and Capability to Achieve the Objectives

List for all personnel, consultants, or contractors to be funded with grant funding:
- **Name (or for not yet identified staff, list "to be determined)**
- **Percentage time (estimated FTE)**
- **Role/job title**
- **Responsibilities**

(response limited to 500 words)

Insert text here.

Itemized Project Budget and Instructions

Complete the budget template below. Applications are NOT required to request funds under each budget category. The budget request must be consistent with and support the project narrative described in Item #3 above. A separate page must be completed for each quarterly budget, with the final page summarizing the total requested funds for all six (6) quarters.

Please do not use symbols or words in the FTE or Cost columns. Decimals are acceptable (e.g., "2.5 FTEs") for the FTE field. Cost should indicate the total cost for all FTEs in this role. Use whole numbers only for all cost fields. You do not have to fill out every row in every table; use what you need and leave the rest blank.

Quarter 1 Budget Tables

Quarter 1: Personnel Budget Table

Line Item	Personnel Role	FTE	Cost
Role 1			
Role 2			
Role 3			
Role 4			
Role 5			
Role 6			
Role 7			
Role 8			
Role 9			
Role 10			
Total		0	0

Quarter 1: Additional Items Budget Table

Line Item	Cost
Payroll and taxes, etc.	
Employee benefits	
Total	0

Quarter 1: Subcontractors and Consultants Budget Table

Line Item	Subcontractor or Consultant Function	Cost
Row 1		
Row 2		
Row 3		
Row 4		
Row 5		
Row 6		
Row 7		
Row 8		
Row 9		
Row 10		
Total		0

Quarter 1: Direct Expenses Budget Table

Line Item	Cost
Outreach Materials	
Program Supplies	
Staff Training	
Travel (local travel and, learning collaboratives, etc.)	
Rent	
Equipment	
Infrastructure Support	
Total	0

Quarter 1: Other Direct Expenses Budget Table

Line Item	Specify Direct Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 1: Indirect Expenses (up to 10 percent of direct costs) Budget Table

Line Item	Specify Indirect Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 1 Budget Total (reflects totals from each table above):

THESE PAGES ARE ONLY A WORKSHEET. APPLICANTS MUST GO TO:
https://buildingcaldata.smapply.us/prog/peer_workforce_investment_pwi_round_2 to complete the online application.

Quarter 2 Budget Tables

Quarter 2: Personnel Budget Table

Line Item	Personnel Role	FTE	Cost
Role 1			
Role 2			
Role 3			
Role 4			
Role 5			
Role 6			
Role 7			
Role 8			
Role 9			
Role 10			
Total		0	0

Quarter 2: Additional Items Budget Table

Line Item	Cost
Payroll and taxes, etc.	
Employee benefits	
Total	0

Quarter 2: Subcontractors and Consultants Budget Table

Line Item	Subcontractor or Consultant Function	Cost
Row 1		
Row 2		
Row 3		
Row 4		
Row 5		
Row 6		
Row 7		
Row 8		
Row 9		
Row 10		
Total		0

Quarter 2: Direct Expenses Budget Table

Line Item	Cost
Outreach Materials	
Program Supplies	
Staff Training	
Travel (local travel and, learning collaboratives, etc.)	
Rent	
Equipment	
Infrastructure Support	
Total	0

Quarter 2: Other Direct Expenses Budget Table

Line Item	Specify Direct Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 2: Indirect Expenses (up to 10 percent of direct costs) Budget Table

Line Item	Specify Indirect Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 2 Budget Total (reflects totals from each table above):

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Quarter 3 Budget Tables

Quarter 3: Personnel Budget Table

Line Item	Personnel Role	FTE	Cost
Role 1			
Role 2			
Role 3			
Role 4			
Role 5			
Role 6			
Role 7			
Role 8			
Role 9			
Role 10			
Total		0	0

Quarter 3: Additional Items Budget Table

Line Item	Cost
Payroll and taxes, etc.	
Employee benefits	
Total	0

Quarter 3: Subcontractors and Consultants Budget Table

Line Item	Subcontractor or Consultant Function	Cost
Row 1		
Row 2		
Row 3		
Row 4		
Row 5		
Row 6		
Row 7		
Row 8		
Row 9		
Row 10		
Total		0

Quarter 3: Direct Expenses Budget Table

Line Item	Cost
Outreach Materials	
Program Supplies	
Staff Training	
Travel (local travel and, learning collaboratives, etc.)	
Rent	
Equipment	
Infrastructure Support	
Total	0

Quarter 3: Other Direct Expenses Budget Table

Line Item	Specify Direct Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 3: Indirect Expenses (up to 10 percent of direct costs) Budget Table

Line Item	Specify Indirect Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 3 Budget Total (reflects totals from each table above):

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Quarter 4 Budget Tables

Quarter 4: Personnel Budget Table

Line Item	Personnel Role	FTE	Cost
Role 1			
Role 2			
Role 3			
Role 4			
Role 5			
Role 6			
Role 7			
Role 8			
Role 9			
Role 10			
Total		0	0

Quarter 4: Additional Items Budget Table

Line Item	Cost
Payroll and taxes, etc.	
Employee benefits	
Total	0

Quarter 4: Subcontractors and Consultants Budget Table

Line Item	Subcontractor or Consultant Function	Cost
Row 1		
Row 2		
Row 3		
Row 4		
Row 5		
Row 6		
Row 7		
Row 8		
Row 9		
Row 10		
Total		0

Quarter 4: Direct Expenses Budget Table

Line Item	Cost
Outreach Materials	
Program Supplies	
Staff Training	
Travel (local travel and, learning collaboratives, etc.)	
Rent	
Equipment	
Infrastructure Support	
Total	0

Quarter 4: Other Direct Expenses Budget Table

Line Item	Specify Direct Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 4: Indirect Expenses (up to 10 percent of direct costs) Budget Table

Line Item	Specify Indirect Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 4 Budget Total (reflects totals from each table above):

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Quarter 5 Budget Tables

Quarter 5: Personnel Budget Table

Line Item	Personnel Role	FTE	Cost
Role 1			
Role 2			
Role 3			
Role 4			
Role 5			
Role 6			
Role 7			
Role 8			
Role 9			
Role 10			
Total		0	0

Quarter 5: Additional Items Budget Table

Line Item	Cost
Payroll and taxes, etc.	
Employee benefits	
Total	0

Quarter 5: Subcontractors and Consultants Budget Table

Line Item	Subcontractor or Consultant Function	Cost
Row 1		
Row 2		
Row 3		
Row 4		
Row 5		
Row 6		
Row 7		
Row 8		
Row 9		
Row 10		
Total		0

Quarter 5: Direct Expenses Budget Table

Line Item	Cost
Outreach Materials	
Program Supplies	
Staff Training	
Travel (local travel and, learning collaboratives, etc.)	
Rent	
Equipment	
Infrastructure Support	
Total	0

Quarter 5: Other Direct Expenses Budget Table

Line Item	Specify Direct Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 5: Indirect Expenses (up to 10 percent of direct costs) Budget Table

Line Item	Specify Indirect Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 5 Budget Total (reflects totals from each table above):

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Quarter 6 Budget Tables

Quarter 6: Personnel Budget Table

Line Item	Personnel Role	FTE	Cost
Role 1			
Role 2			
Role 3			
Role 4			
Role 5			
Role 6			
Role 7			
Role 8			
Role 9			
Role 10			
Total		0	0

Quarter 6: Additional Items Budget Table

Line Item	Cost
Payroll and taxes, etc.	
Employee benefits	
Total	0

Quarter 6: Subcontractors and Consultants Budget Table

Line Item	Subcontractor or Consultant Function	Cost
Row 1		
Row 2		
Row 3		
Row 4		
Row 5		
Row 6		
Row 7		
Row 8		
Row 9		
Row 10		
Total		0

Quarter 6: Direct Expenses Budget Table

Line Item	Cost
Outreach Materials	
Program Supplies	
Staff Training	
Travel (local travel and, learning collaboratives, etc.)	
Rent	
Equipment	
Infrastructure Support	
Total	0

Quarter 6: Other Direct Expenses Budget Table

Line Item	Specify Direct Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 6: Indirect Expenses (up to 10 percent of direct costs) Budget Table

Line Item	Specify Indirect Expenses	Cost
1. Other (specify):		
2. Other (specify):		
3. Other (specify):		
4. Other (specify):		
5. Other (specify):		
6. Other (specify):		
7. Other (specify):		
Total		0

Quarter 6 Budget Total (reflects totals from each table above):

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Thank you for your interest in becoming a grantee of the Peer Workforce Investment (PWI) program of the Behavioral Health Workforce Development initiative of DHCS.

Based on your quarterly budget tables, your total budget request is: _____

☐ Checking this box affirms that this total matches your total budget request amount. If these do not match, adjust the quarterly budget tables as needed before checking this box.