PWI & EPOC Round 2 Launch

Presented by the Peer Workforce Initiative (PWI) & Expanding Peer Organization Capacity (EPOC) Team

Tuesday, June 13, 2023

12 p.m. – 1 p.m.

Housekeeping

📞	**Join by Phone:** Click Join Audio, Phone Call tab, dial the desired phone number, and enter Meeting ID and Participant ID.	01
🖥️	**Camera:** Please keep your camera on unless you have low bandwidth.	02
🪪	**Name:** Please change your name to your actual name.	03
💬	**Live Captioning:** Click CC Live Transcript to show or hide captions.	04
🙂	**Chat:** Click the Chat icon to open the Chat panel.	05
🖼️	**Reactions:** Find them on the bottom toolbar. **Full-screen:** Double-click to toggle.	06
❓	**Need help?** Type in the Chat box!	07
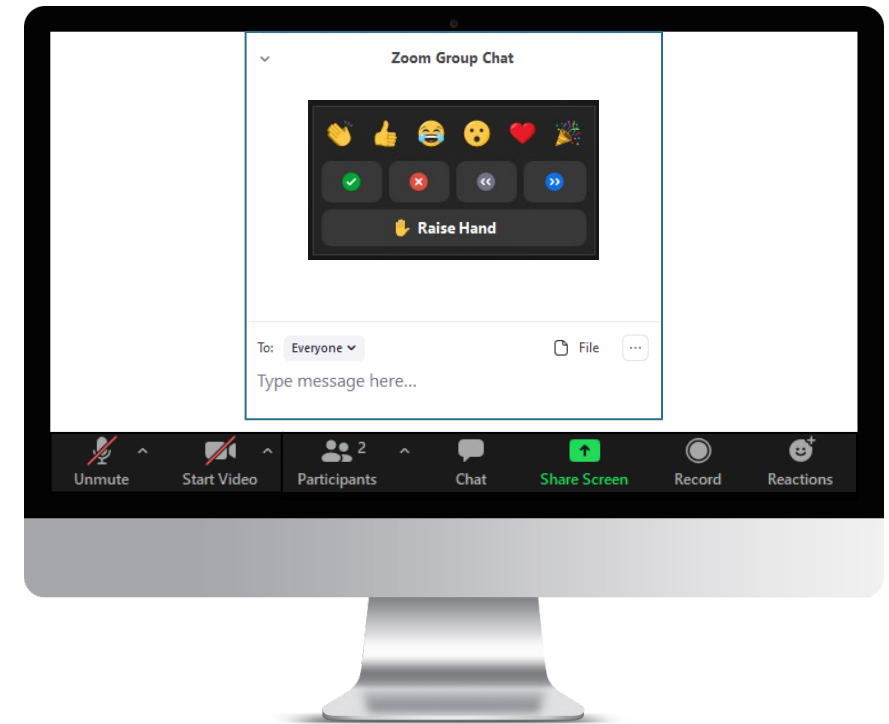
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Indigenous Land Acknowledgement

- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.

- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California and in displaying respect, honor, and gratitude for all indigenous people.

Whose land are you on?

Option 1: Text your ZIP code to 1-907-312-5085

Option 2: Enter your location at https://native-land.ca

Option 3: Access Native Land website via QR Code
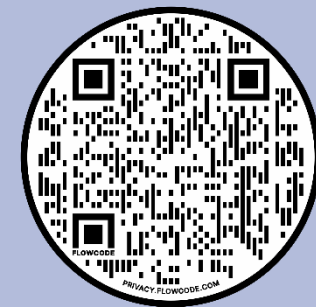
Advocates for Human Potential, Inc. (AHP)
PWI & EPOC Team
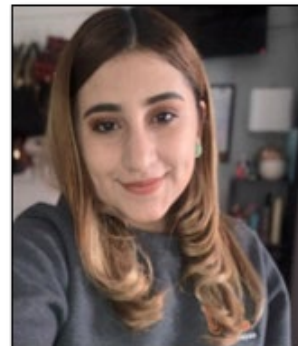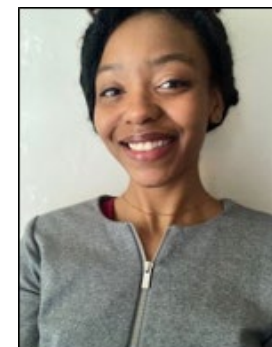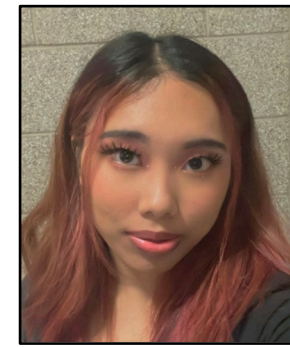
Agenda

1. Welcome/PWI and EPOC Program Overview
2. PWI and EPOC, Round 2, Training and Technical Assistance (TTA)
3. PWI and EPOC Coordinator Role
4. Statement of Work (SOW)
5. Contracts
6. Invoicing
7. Quarterly Reports and Data Collection
8. Implementation Plan
9. Attendance Requirements
10. Next Steps
11. Important Reminders
12. Q&A

PWI & EPOC, Round 2, Grantees WELCOME and CONGRATULATIONS!

42	**PWI, Round 2, Grantees**
21	**EPOC, Round 2, Grantees**
44	**Cities**
24	**Counties**

EPOC/PWI Round 1 & 2 Map

Congratulations on your awards!

PWI & EPOC Project Overview

Projects are designed to support:

- Expanding **peer-run organizational capacity** to provide peer services for mental health and substance use disorder recovery supports and behavioral health (BH) services.

- Building the preparedness of established and emerging peer service providers so they are ready to **deliver services under the Medi-Cal Peer Services benefit** in every California community.

- Empowering peer-run programs to realize their full potential, including through **strategic planning, and management support**.

- Elevating the recognition of BH peer-run organizations as **critical extenders of care and essential components of California's BH workforce** to extend peer services and impact throughout the state.

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PWI & EPOC TTA Overview

TTA will include the following

Quarterly Learning Collaborative Events and Monthly Webinars

Monthly Grantee Coach (GC)/Grantee 1:1 Check-In Meetings and Monthly Administrative Coaching Calls

Tailored TTA based on grantee needs through AHP & Faces & Voices of Recovery via the [PWI/EPOC Grantee Request Form (smartsheet.com)](#)

Affinity Groups and Optional Events

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PWI & EPOC, Round 2, Program Coordinator

- Mandatory position for all grantees
- Serves as the main point of contact for ensuring all grant deliverables are met
- Full-time Equivalency (FTE) Requirements (must be FTE in the organization, but not necessarily on the project)
  - 1.0 FTE for PWI
  - At least 0.5 FTE for EPOC
- Duties may include (but are not limited to) the following:
  - Participate in monthly GC check-in meetings
  - Provide monthly updates on goals and objectives via Implementation Plan
  - Attend monthly Administrative Coaching Calls
  - Coordinate the submission of quarterly data reports and invoices

SOW Instructions

- Add organization name, Unique ID, and location at the top of SOW.

- *Equipment:* Provide an estimate and list all the necessary equipment; include the total cost on right side. *(New Round 2 Grantees only.)*

- *Deliverables:* All required deliverables are pre-filled and should not be changed or deleted. Add the total in the amount column per quarter.

- Ensure that the totals for years 1 and 2 add up correctly and match Notice of Award (NOA).

- Once completed, save the document with your agency's name and email to your GC by **Friday, June 30, 2023**.

The SOW template and instructions were sent out via email on Tuesday, June 6.
Please reach out to your GC with any questions.

SOW Template - Existing Grantees

- This is a firm fixed price (FFP) deliverable-based contract.

- Line-item budgets will not be requested.

- Grantees must demonstrate progress on agreed-upon tasks within the SOW.

- Quarterly data reports are required for quarterly invoice approval.

- The first payment will be disbursed at the end of the 6/1/23-9/30/23 reporting period (invoices due by October 15).

ATTACHMENT D STATEMENT OF WORK (SOW)
Peer Workforce Investment (PWI) - ROUND 2

Name of org, Unique ID

YEAR 1

Quarter	Deliverable Description	Amount	Delivery Due
Quarter 1 (6/1/23 – 9/30/23) 7438.01-006	**Staffing** • Identify and onboard a Peer Workforce Investment (PWI) Coordinator who will be the lead point of contact with AHP staff and is responsible for ensuring completion of all deliverables. **Outreach/ Education/Training** • Initiate development of outreach and educational materials. • Provide internal staff training. **Tailored Implementation Plan and Sustainability Plan** • Develop PWI project Implementation Plan in accordance with approved original application utilizing template provided by AHP. • Begin working on project sustainability package, including the Program Sustainability Assessment Tool (PSAT) and financial management worksheets, provided by AHP. **Behavioral Health Workforce Resource Center (BHWRC) website** • Register at Home Page	CABHWD (buildingcalhhs.com) and access initial resources. **Reporting** • Participate in collection, submission, and use of data on performance measures, as determined by AHP. • Submit quarterly invoices and quarterly report (6/1/23 – 9/30/23) report, due on 10/15/23.	Enter deliverable amount	10/15/23

SOW Template - New Grantees

- This is an FFP deliverable-based contract.

- Line-item budgets will not be requested.

- **The SOW has two distinct sections or "buckets": Equipment and Staffing & Deliverables. The highlighted yellow equipment section text is an example and should be replaced.**

- Grantees must demonstrate progress on agreed upon tasks within the SOW.

- Quarterly data reports are required for quarterly invoice approval.

- **Grantees can invoice up to 50% of the 1st quarter payment upon contract execution.** The rest of the 1st quarter payment will be disbursed at the end of the 6/1/23-9/30/23 reporting period (invoices due by October 15).

ATTACHMENT D STATEMENT OF WORK (SOW)
Peer Workforce Investment (PWI) - ROUND 2

Name of org, Unique ID

Equipment (*NOTE: Additional Equipment purchase terms apply*. Please review the Subcontract carefully about Subcontractor's ongoing obligations with all equipment purchases.)

• Itemize estimates for equipment/durable goods you plan to purchase. E.g.: • Two (2) laptops at $600 each = $1,200.00 • Two (2) cell phones at $200 each = $400.00	Enter total amount for equipment to be purchased of the life of the grant period.

YEAR 1

Quarter	Deliverable Description	Amount	Delivery Due
Quarter 1 (6/1/23 – 9/30/23) 7438.01-006	Execution of Contract with AHP	Up to 50% of 1st quarter payment	9/30/23
Quarter 1 (6/1/23 – 9/30/23) 7438.01-006	**Staffing** • Identify and onboard a Peer Workforce Investment (PWI) Coordinator who will be the lead point of contact with AHP staff and is responsible for ensuring completion of all deliverables. **Outreach/ Education/Training** • Initiate development of outreach and educational materials. • Provide internal staff training. **Tailored Implementation Plan and Sustainability Plan** • Develop PWI project Implementation Plan in accordance with approved original application utilizing template provided by AHP. • Begin working on project sustainability package, including the Program Sustainability Assessment Tool (PSAT) and financial management worksheets, provided by AHP.	Enter deliverable amount	10/15/23

Contract Execution

1. Grantee submits completed SOW to GC.

2. GC reviews SOW (will contact Grantee with any issues).

3. GC approves SOW and passes it on to AHP Contracts Office.

4. Grantee's contract main contact will receive a contract from AHP Contracts Office via email.

   – The contract main contact was the individual named in the PWI & EPOC NOA/baseline expenditures surveys.

5. Grantee signs and returns contract to AHP Contracts Office for countersignature.

6. AHP Contracts Office signs and returns contract to Grantee.

   – Once Step #6 is completed, the contract is considered <u>executed</u>.

7. AHP Finance team contacts Grantee to gather financial contact information and establish payment methods, etc.

Invoice Instructions

- Once the quarter has ended, the organization may invoice AHP as long as its contract is executed.

- Invoices are to be completed and submitted to AHP promptly upon completion of quarterly deliverables.

- The first reporting period is June 1, 2023 - September 30, 2023, and organizations will invoice AHP using the templates provided.

*New grantees can invoice earlier, up to 50% of the first quarter payment upon contract execution.

**Existing grantees with Round 1 No Cost Extension (NCE) contract modifications must submit two invoices by October 15 (one for Round 1 and one for Round 2).

Invoice Template

- ✓ Scan to PDF and email completed invoice to: **ap2@ahpnet.com**

- ✓ Payment terms are 10 business days from AHP's receipt **and approval** of the invoice, unless otherwise specified in your Consulting Agreement.

- ✓ Invoices received more than 30 days after completion of services may not be eligible for payment.

- ✓ No invoice will be approved for payment if AHP does not have your executed Subcontractor Agreement and signed W-9 on file.

- ✓ Sign and date

BHWD – PWI INVOICE TEMPLATE
EMAIL COMPLETED INVOICE AND RECEIPTS FOR EQUIPMENT, IF APPLICABLE, TO AP2@AHPNET.COM

Advocates For Human Potential, Inc.

PWI Invoice Template

Grantee Quarterly Deliverables Invoice

Agency Name or Fiscal Agent:		
Address:		
Telephone #:		
Unique Site Identifier (in your contract and SOW):		
Project #: 7438.01-006 (CA BHWD Project)		
June 1, 2023- Sept 30, 2023	**Equipment**	**Deliverable Amount (per contract)**
7438.01 – 006 06/01/2023 – 9/30/2023	Include equipment you purchased here. If you did not purchase equipment in quarter 7, please delete this text before submitting. Do not replace with "no equipment purchased" If you have equipment, please list it as: 1 laptop at $332.53 2 desks at $151.21 etc.]	Please add equipment total here. If you did not purchase equipment, please delete this text before submitting. Do not replace with 0.
June 1, 2023- Sept 30, 2023	**Deliverable Description** *The below text is part of the template. DO NOT DELETE. If you did not participate/complete any of the below deliverables in BOLD, please write the circumstance below the template text.*	**Deliverable Amount (per contract)**
7438.01 – 006 6/01/2023 – 9/30/2023	**Staffing** Identify and onboard a Peer Workforce Investment (PWI) Coordinator who will be the lead point of contact with AHP staff and is responsible for ensuring completion of all deliverables. **Outreach/ Education/Training** Initiate development of outreach and educational materials. Provide internal staff training. **Tailored Implementation Plan and Sustainability Plan** Develop PWI project Implementation Plan in accordance with approved original application utilizing template provided by AHP. Begin working on project sustainability package, including the Program Sustainability Assessment Tool (PSAT) and financial management worksheets, provided by AHP.	Add total from payment schedule for this quarter here (found in your contract) please delete this text before submitting.

Invoices FAQs

On the "Activities/Deliverables" section, do we invoice our actual expenses, or the total amount listed on the SOW in the contract?

The total amount listed on the SOW in the contract.

Can the funds designated for equipment roll over to the next quarter if we don't use as much as we anticipated?

The equipment funds can roll over to the next quarter.

Is invoicing only quarterly? Can invoices be submitted on a monthly basis?

PWI & EPOC projects follow a quarterly payment schedule.

When will we get our check?

Once the invoice is approved by AHP Accounting, funds will be received within 10 business days.

CFDA Number for Finance Departments

CFDA # (Catalog of Federal Domestic Assistance) for these grants:
93.959

Quarterly Reports and Data Collection

All PWI & EPOC grantees must participate in the collection, submission, and use of data on performance measures, as determined by AHP.

- Quarterly data reports must be completed by the 15th of the month following the reporting period (e.g., the 7/1/23-9/30/23 report is due on 10/15/23).

- Completion of the quarterly data report is required for invoice approval.

- Quarterly data reports can be accessed on each grantee's PWI & EPOC dashboard on the BHWD website.

- Your data plays a crucial role in informing PWI & EPOC, DHCS, and other reporting agencies about the impact of the grant in California.
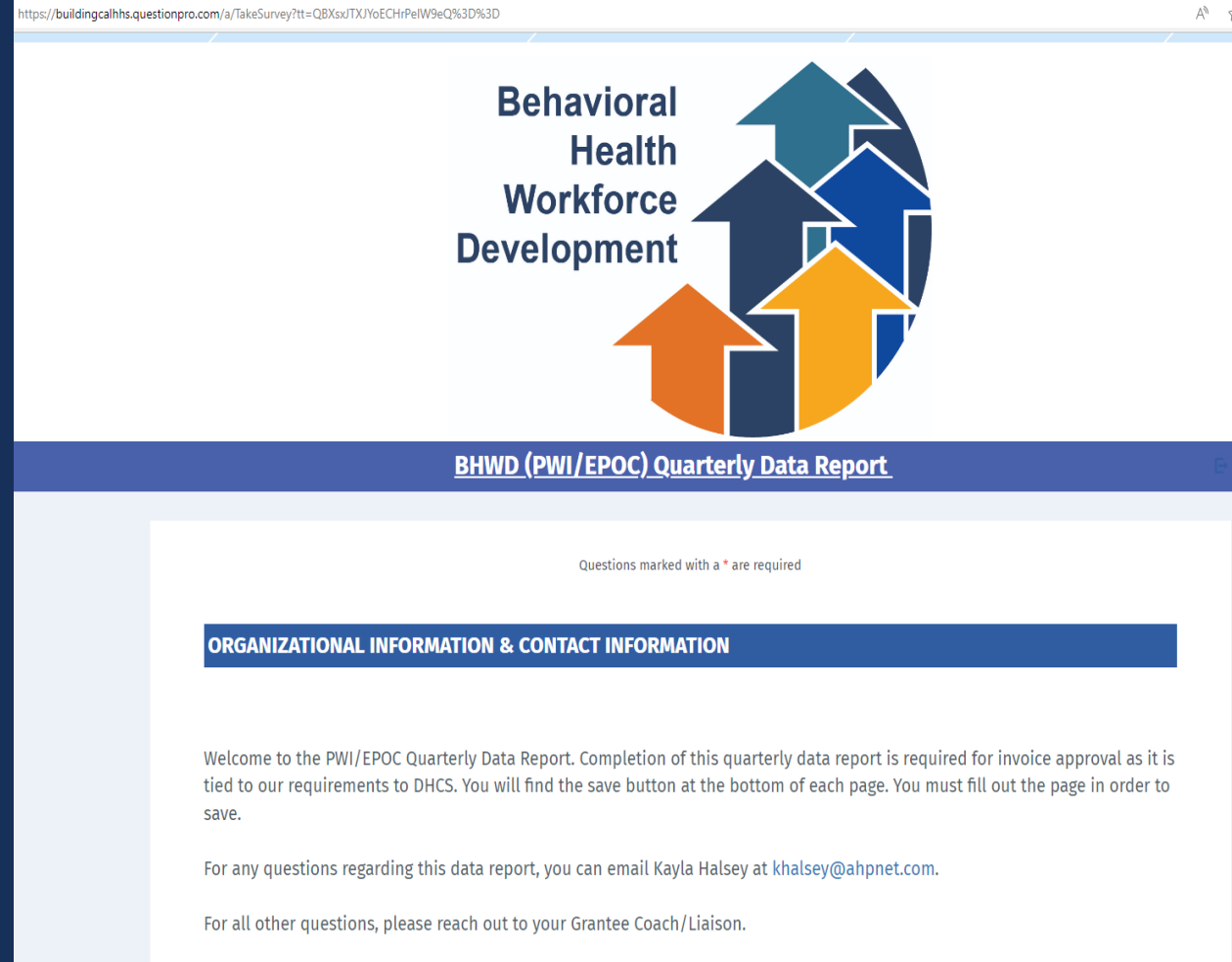
Quarterly Data Report Template

Review metrics in the PDF before the quarter ends.

Email our BHWD Data inbox with any questions at bhwddata@ahpnet.com.

Additional training on data entry will be provided at the June PWI & EPOC Office Hours on June 22, 2023, from 12 p.m. - 1 p.m. PT.

Implementation Plan (IP)

All PWI & EPOC Grantees must develop an IP utilizing the template provided by AHP.

- The IP must be tailored with SMART (Specific, Measurable, Achievable, Realistic, and Timely) goals/objectives and be approved by AHP.

- The IP must have at least three (3) active organization-specific goals throughout the course of the PWI/EPOC project, in addition to the prefilled goals related to contract requirements.

- Continued execution of the IP is required for invoice approval, and progress will be monitored with your GC during monthly 1:1 check-in meetings. PWI/EPOC grantees must come prepared to share updates on SMART goals/objectives with their GC.

- The IP and all future iterations will be housed on each Grantee's PWI/EPOC dashboard on the BHWD website.

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IP Template

PWI & EPOC Event Attendance Requirements

Per Site	Monthly Webinars	Monthly Administrative Coaching Calls	Quarterly Learning Collaboratives	Monthly 1:1 Check-In Meetings	Additional TTA (Office Hours, Affinity Groups, Optional Events)
Time Commitment	1 hour/month	1 hour/month	3 hours/quarter	Depending on need, 30-60 minutes/month	Depending on interest/need
PWI & EPOC Coordinator	Highly encouraged	Required	Highly encouraged	Required	Highly encouraged
Total Attendees Required	At least 1 staff member	At least 1 staff member	At least 2 staff members	At least 1 staff member	Depending on interest/need

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Important Due Dates/Reminders

- **By June 30, 2023:**

  - Identify a **PWI/EPOC Coordinator** for your project (PWI 1.0 FTE, EPOC 0.5+ FTE).

  - Participate in a **June 1:1 check-in meeting** with your assigned GC and create a **recurring meeting schedule** for the remainder of the contract period (6/1/23-12/31/24).

  - Participate in the optional **PWI & EPOC Office Hours** for additional administrative support if needed on **Thursday, June 22, 2023, from 12 p.m. - 1 p.m. PT.**

  - Complete revised **SOW** and submit to GC.

  - Complete **IP** with SMART goals and objectives and submit to GC.

- Meet the attendance requirement for all live mandatory **PWI & EPOC events**. To view upcoming events, existing grantees can visit https://www.workforce.buildingcalhhs.com/pwi-epoc-hub/. New grantees will receive a calendar via Constant Contact.

- The first PWI & EPOC, Round 2, **Invoice & Quarterly Data Report** for reporting period 7/1/23-9/30/23 will be due by **October 15, 2023.** (*New grantees can bill up to 50% of first-quarter funding upon contract execution.)

- The new **BHWD PWI & EPOC website** will be live in the next coming weeks. Please respond swiftly to create a log-in and access the platform.

Q&A

Please fill out the attendance form and feedback survey in the chat to meet your requirements for today's event!

Thank You