Peer Workforce Initiative (PWI) and Expanding Peer Organization Capacity (EPOC)

Administrative Coaching Call

Presented by: PWI/EPOC Administrative Entity (AE) Team

Behavioral Health Workforce Development (BHWD)

Thursday, December 14, 2023

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 Native Land CA

Option 3: Access Native Land website via QR Code
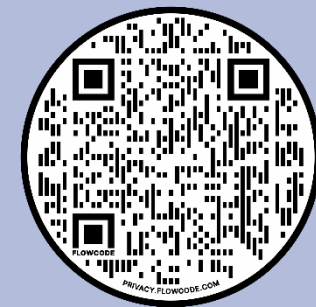
Agenda

1. PWI/EPOC Team Updates

2. Updated Community Agreements

3. Financial Worksheets Timeline

4. PWI/EPOC Data Updates

5. Program Sustainability Assessment Tool (PSAT) Next Steps Reminder

6. Resource Spotlight: Establishing Memoranda of Understanding (MOUs)

7. Public Facing Contact Roster Reminder

8. Two-Track Events Overview

9. January Two-Track Event Details

10. Upcoming Events

11. Q&A/Open Discussion
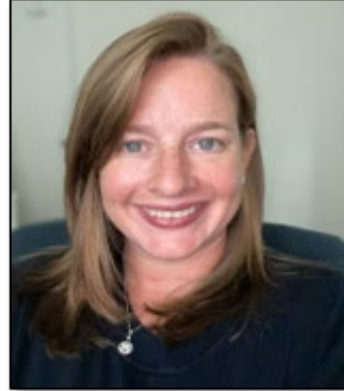
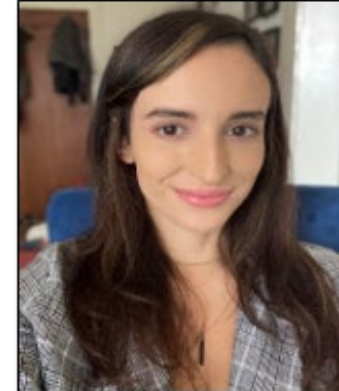# BHWD Initiative: PWI and EPOC AE Team Advocates for Human Potential (AHP)

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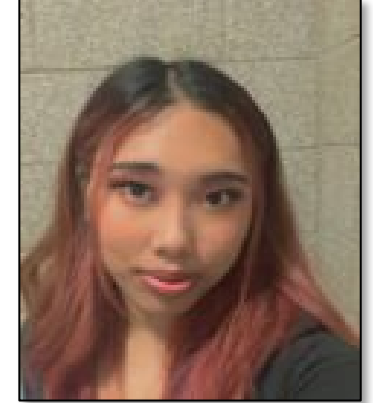
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Grantee Coach

Neyat Tefery
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Ops Specialist

Vic Walker
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Updated Community Agreements

- Be present and be an active listener.

- One mic, one voice.

- Practice inclusivity.

- Honor pronouns and gender identity.

- Show respect (this may look different for each person).

- Allow conflicting perspectives to exist.

- Assume best intentions.

- Take space, make space.

- Share what you are comfortable sharing.

- Protect individual privacy.

- Practice self-care.

- Encourage growth of self and for others.

- Support resource sharing.

Financial Worksheet Timeline

Please see the timeline below for guidance on the PWI and EPOC Implementation Plan goal of *"completing required financial worksheet."*

January 31, 2024
Fund Development Learning Collaborative

Learn About Financial Worksheet Concepts

Receive Financial Worksheet & Resources

January 31, 2024
Review and discuss within Grantee team

February 22, 2024
PWI/EPOC Administrative Coaching Call

Receive Financial Worksheet Guidance

Discuss with Grantee Coach

March 2024
Monthly 1:1 Check-In Calls

March 14, 2024
Financial Worksheet Optional Q&A

Open Office Hours

Submission Deadline

March 31, 2024
Submit to Grantee Coach (GC)

Following the submission deadline, grantees will receive additional guidance on the next PWI and EPOC Implementation Plan goal: *"integrating financial worksheet findings into overall organizational development."*

PWI and EPOC Data Updates

- Reminder: The next Quarterly Data Report (QDR) is due no later than January 15, 2024.

- If you do not have your own means of collecting and tracking data, please use our QDR Tracking Sheet to gather all the necessary information in one place.

- Reminder: The QDR must be completed via the PWI/EPOC Administrative Portal or it will not be accepted and your invoice will not be approved. The link will be live beginning January 2, 2024.

- Please send any questions to bhwddata@ahpnet.com.

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Reminder: PSAT Next Steps

- To fulfill the PWI/EPOC Implementation Plan goal of "integrating PSAT findings into overall organizational development," grantees will be required to create sustainability goals based on low-scoring domains.

- During December 1:1 Check-In Meetings, grantees and GCs will review your PSAT results, discuss potential areas of focus, and brainstorm potential goals.

- Grantees are required to develop two to three PSAT SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) goals, add them to their January Implementation Plan, and submit for review by their GC via the PWI/EPOC [Administrative Portal](#).

- From February 2024 through December 2024, grantees will work toward completion of their PSAT SMART goals and report progress monthly on their Implementation Plan.

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Resource Spotlight: Establishing an MOU

- MOUs are agreements that formally define expectations and state each party's intentions to collaborate toward a common goal.

- MOUs can be helpful in creating mutual understanding between organizations and aid in establishing strong partnerships.

- Refer to the PWI and EPOC General Hub for the MOU FAQ Sheet, MOU Template, and MOU Office Hours Recording.

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Reminder: PWI and EPOC Public Facing Contact Roster

- The PWI and EPOC Public Facing Contact Roster is on the General Hub.

- Grantees can add contacts to the roster at the end of each quarter using the [PWI/EPOC Public Facing Contact Roster Form](#).

- The PWI and EPOC team will update and upload the [PWI/EPOC Public Facing Contact Roster](#) to the General Hub quarterly.

- This roster allows grantee contact information to be accessible to all PWI and EPOC grantees for networking and collaboration purposes.

- To remove a representative from your organization from the roster, please contact your GC.

Two-Track Events Overview

- **From January through May 2024, PWI and EPOC Webinars will be conducted as two-track events.**

- This will give grantees the ability to choose training content based on their organization's needs. The two tracks (foundational and advanced) will be offered via breakout rooms.

- These events will be mandatory and require at least one representative from each grantee organization to attend. Attendees will not be able to switch rooms once they make a selection, but recordings and slides will both be available to all afterward.

- **Who should choose the foundational track?**

  - Individuals new to nonprofit management
  - Those seeking a solid understanding of basic principles
  - Organizational staff involved in program management and coordination or administration

- **Who should choose the advanced track?**

  - Management/leadership staff with experience in nonprofit settings
  - Organizational leaders who are looking to refine their overall strategies
  - Those interested in exploring advanced topics to enhance, challenge, or expand their organizational management and development skills

Two-Track Event Topics

Day/Time	Topic
Monday, 1/08/24 12 p.m. to 1 p.m.	Nonprofit Fiscal Management
Monday, 2/12/24 12 p.m. to 1 p.m.	SWOT/Strategic Planning
Monday, 3/04/24 12 p.m. to 1 p.m.	Board Development and Governance
Monday, 4/08/24 12 p.m. to 1 p.m.	Service Tracking and Data Integration
Monday, 5/13/24 12 p.m. to 1 p.m.	Program Evaluation

January Two-Track Event Details (1/08/24)

Nonprofit Fiscal Management		
Details	**Foundational Track**	**Advanced Track**
Learning Goals	• Creating a budget (timeline, components) • Roles and training for all levels (staff, Board) (recruiting for board members) • Difference between financial review/audit (funder audit vs. organization-led audit) • Financial reports: pros and cons for each type	• Budget review process (key staff, Board) • How to assess your Board's level of understanding in finances • Hiring a CPA/auditor: qualifications and best practices for changing contractors • Best practices with preparing and sharing financial reports for Board meetings
Target Audience	• Individuals new to nonprofit fiscal management • Those seeking a solid understanding of basic financial principles • Participants who are interested in establishing a strong foundation for their organization's fiscal practices • Organizational staff involved in program management and coordination or administration	• Financial management staff with experience in nonprofit settings (CFOs, grant managers, Board members, program directors, etc.) • Organizational leaders who are looking to refine their fiscal strategies • Those interested in exploring advanced topics to enhance, challenge, or expand their financial management skills

Upcoming Events

Upcoming Events	Date and Time (PT)	Required?
Two-Track Webinar: Nonprofit Fiscal Management	Monday, 1/08/24 12 p.m. to 1 p.m.	Yes (one representative)
Administrative Coaching Call: January 2024	Thursday, 1/18/24 12 p.m. to 1 p.m.	Yes (one representative)
Learning Collaborative: Fund Development	Wednesday, 1/31/24 1 p.m. to 4 p.m.	Yes (two representatives)

Please access the PWI and EPOC General Hub to start registering for 2024 events and adding them to your calendar for the year ahead.

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Q&A

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

Thank You