



# Quarterly Admin Coaching Call

## Behavioral Health Recruitment and Retention

December 20, 2023 | 12 p.m.-1 p.m. PT



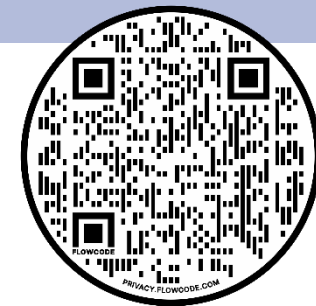
# Indigenous Land Acknowledgement

- 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: Enter your location at <https://native-land.ca>

Option 2: Access Native Land website via QR Code





# Advocates for Human Potential, Inc. (AHP) Behavioral Health Recruitment and Retention (BHRR) Team



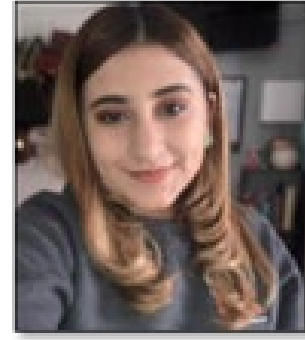
Susan Lange  
*Program Director  
Center for Workforce  
Development*



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*BHRR Deputy Project Director  
& Grantee Coach*



Roxanne Brooks  
*Grantee Coach*



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*Grantee Coach*



Sandra Gomez  
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*2nd-Year M.S.W. Intern  
Grantee Coach in Training*



Cherice Cooley  
*Operations Specialist*



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*Quality  
Assurance Coordinator*



Kate Cox  
*BHWD  
Operations Manager*



Kayla Halsey  
*BHWD Data &  
Analyses  
Manager*

This project would not be possible without the many amazing people who work in the background but are not on this slide.

# AHP Workforce Development (WFD) Subject Matter Expert (SME) Team



Susan Lange  
WFD SME &  
Program Director



Allen Fowler  
WFD SME &  
Senior Writer



Kweilin Waller  
WFD SME & Program  
Director



Martina Durant  
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Sandra Gomez  
WFD SME &  
Senior Program  
Associate



Maurizio Martinez  
WFD SME &  
Program Associate





# Agenda

1. Introduction and Agenda Setting
2. BHRR Project Overview
3. Phase B Overview
4. Modalities of Training and Technical Assistance (TTA) Participation
5. Phase B Training Topics
6. BHRR Attendance Requirements
7. BHRR Outward Facing Roster
8. Administrative Portal Demo
9. Subcontractor Forms
10. Catalog of Federal Domestic Assistance
11. Invoices and Phase B Template
12. Deliverable-Based Contract & Audits
13. Quarterly Reports and Data Collection
14. Sustainability Action Plan
15. Upcoming Events and Reminders
16. Question and Answer (Q&A)



# BHRR Project Overview

**The project is designed to do the following:**

- Support development of **recruitment and retention** at behavioral health (BH) organizations to help expand California's future behavioral health workforce, specifically in the area of opioid use disorder (OUD) prevention, treatment, and recovery.
- Improve BH organizations' knowledge and implementation of best practices in BH **workforce development** and change management.
- Strengthen the capacity of BH organizations' capacity to effectively **recruit and retain** skilled staff through identification and deployment of specific strategies in their organization.
- Increase the **diversity of the BH workforce** through an array of strategies to better reflect the individuals in need of service.
- Increase BH organizations' **sustainability** and their ability to respond to changing environments by supporting their development of and adherence to longer-term **strategic plans**.

# Modalities of Training and Technical Assistance

**TTA will include the following:**

Quarterly Learning Collaborative meetings

Coaching calls, webinars, cohort workshops

Support from SMEs on workforce development

Tailored technical assistance (TA) based on grantee requests



# PHASE B

## Training Topics

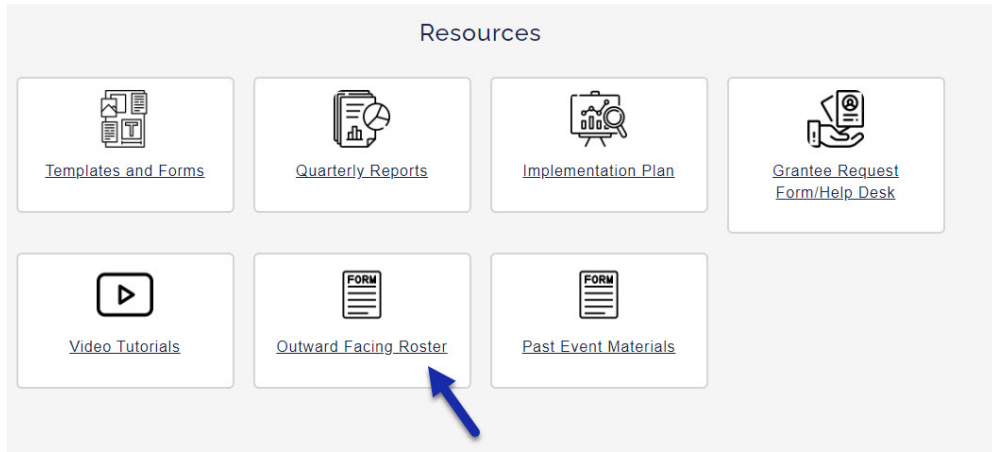
- Responsive Leadership: Creating Healing-Centered Workspaces
- Baselines and Benchmarks: Using Data to Craft a Workforce Plan
- The Power of Partnership: A Path to Advocacy and Equity
- Crafting Advocacy Roadmaps
- Charting Your Course: Asset Mapping toward a Workforce Pipeline and Collaborative Partnerships
- Connecting to Local Resources and Building Sustainability
- Promoting Antiracist, Antioppressive Workspaces
- Working with the Whole Person: Shifting to a Competency-Based Framework
- ...and more!



# BHRR Attendance Requirements

Per Site	Monthly Webinars	Quarterly Administrative Coaching Calls	Quarterly Learning Collaboratives	Tailored Individual TTA	Workshops	Open Office Hours	1:1 Coaching Calls with GC
<b>Time Commitment</b>	1 hour/month	1 hour/quarter	2.5 hours/quarter	Depends on need	90 minutes/monthly	60-90 minutes/monthly or as needed	1 hour/monthly
<b>Grantee Main Point Of Contact</b>	Required	Required	Required	As needed	Required	Optional (highly encouraged)	Required
<b>Human Resources (HR); Leadership; Diversity, Equity &amp; Inclusion (DEI) Office; Managers; Other Relevant Staff</b>	Highly encouraged (depending on the topic)	N/A	Highly encouraged (depending on the topic)	As needed	Highly encouraged (depending on their involvement)	Optional (highly encouraged)	Depends on need (highly encouraged)

# BHRR Outward Facing Roster



- Available to BHRR grantees on the BHRR Hub with additional resources
- Contains contact information of fellow grantees
- These grantees are willing and able to provide limited mentorship.
- We encourage partnership between our grantees. Please use this resource to share information and best practices.

BHRR Phase B Outward Facing Contact Roster

Contact Organization	Contact Name	Contact Role	Contact Email	Willing to provide limited mentorship?
Aspirinet Behavioral Health Division	Liane Ma	Talent & Workforce Development Program Manager	lma@aspirinet.org	Y
Aspirinet Family and Community Division	Liane Ma	Talent & Workforce Development Program Manager	lma@aspirinet.org	Y
Aspirinet Residential and Education Division	Liane Ma	Talent & Workforce Development Program Manager	lma@aspirinet.org	Y
Aspirinet Resource Family Adoption and Foster Care Division	Liane Ma	Talent & Workforce Development Program Manager	lma@aspirinet.org	Y
Aspirinet Transition Aged Youth Division	Liane Ma	Talent & Workforce Development Program Manager	lma@aspirinet.org	Y
Aspirinet Transition Aged Youth Division	Liane Ma	Talent & Workforce Development Program Manager	lma@aspirinet.org	Y
Aspirinet Wraparound and Intensive Home Based Services Division	Liane Ma	Talent & Workforce Development Program Manager	lma@aspirinet.org	Y
Chinatown Service Center	Timothy Ribau	Assistant Director	tribau@csccs.org	Y
City Impact	Cynthia Torres	Interim Executive Director	ctorres@cityimpact.com	Y
Community Clinics Health Network and Health Quality Partners of Southern California	Janelle Kistler	Network Support Manager	jkistler@hhsocal.org	Y
Community Health for Asian Americans	Julia Chen	HR Associate	julia.chen@chaaaweb.org	Y
Community Solutions	Melissa Santos	Sr. Director of Strategy & Community Development	melissa.santos@communitysolutions.org	Y
Compassion Counseling Center	Paula Torres	Director	ptorres@compassion.org	Y



BHRR Website

BHWD Hub

BHRR Portal

Log-ins

# Administrative Portal



- Implementation Plan:
  - Upload an updated version of the organization's implementation plan (IP) **monthly** for the grantee coach (GC) to review.
  - Please upload *at least* a few days before the coaching call to allow the GC time to review the updated IP and take notes.
- Quarterly Data Reports:
  - Continue to submit Quarterly Data Reports (QDRs) in the administrative portal.
    - Progress in the portal can be saved before submitting.
    - Quarterly deliverables will be updated to the QDR.



# Subcontractor Forms

- The subcontractor form submission process has been revised.
  - We will now use a Smartsheet form.
    - [AHP Request Form for Approval of BHWD Grantee CONSULTANT or SUBCONTRACTOR Agreement](#)
- A form must be submitted for each subcontractor being paid over \$5,000.
- If the total is over \$50,000, the grantee must provide three bids unless the consultant was named in the grantee's original application.
- Submit the form *before* entering a contract with the selected subcontractor.
- Phase B funds **cannot** retroactively pay for Phase A work.



Catalog of Federal Domestic Assistance (CFDA)  
number for the  
Behavioral Health Workforce Development (BHWD) grants:  
**93.959**

This is the CFDA number to give to the grantee organization's finance department for audit purposes.

# Invoices

The Quarter 2 (Q2) window to submit invoices is January 1-15, 2024.

Use the updated template provided to all grantees via Constant Contact.

An organization may not invoice until the QDR has been completed.

Contract must be modified to include the Phase B statement of work (SOW) prior to the organization sending invoices for Q2. AHP is completing this step this month.

The organization's authorized signatory will be notified when its contract has been modified.

Please submit invoices to [ap2@ahpnet.com](mailto:ap2@ahpnet.com) and cc the organization's GC.

Please reach out to the organization's GC for additional guidance.

# Invoice Template for Phase B

## BHRR INVOICE TEMPLATE

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

Advocates For Human Potential, Inc.

BHRR Invoice Template

Grantee Quarterly Deliverables Invoice

Agency Name:		
Address:		
Telephone #:		
Submitted by name:		
Submitted by email:		
Unique ID: 7438.01-008		
<b>Select a reporting period:</b>	<b>Equipment</b> <i>Include all receipts in one PDF and submit with this form</i>	<b>Deliverable Amount (per contract)</b>
--		
<b>7438.01-008</b>		
	Include equipment purchased here. (If you did not purchase equipment, please delete this text before submitting. Do not replace with "no equipment purchased." Do not delete this box.) Please list equipment as: • 1 laptop at \$332.532 • desks at \$151.21 Equipment listed must match included receipts	Please add equipment total here.  (If you did not purchase equipment, please delete this text before submitting. Do not delete this box. Do not replace with \$0)
	<b>Deliverable Description</b> <i>The below text is part of the template. DO NOT DELETE.</i>	<b>Deliverable Amount (per contract)</b>
	MET QUARTER <a href="#">Click here to choose a reporting period.</a> DELIVERABLES, AS NOTED IN THE SOW.	<b>Add total from payment schedule here (found in your contract).</b> Please delete this text before submitting.
Total Amount Due		<b>Add total of equipment + Attachment E here.</b> Please delete this text before submitting.



# Deliverable- Based Contract & Audits

- BHRR operates on a fixed-price deliverable-based contract model. This means that if the grantee organization has attended all mandatory AHP events, maintained monthly meetings with the GC, completed all reporting requirements, and made measurable progress in accordance with the IP, the organization is entitled to invoice based on the predetermined payment schedule specified in the Phase B SOW.
- This arrangement remains consistent regardless of whether actual costs in the given quarter are lower or higher than the invoiced amount.
- It is of utmost importance to closely monitor unspent funds from quarter to quarter. While there is no requirement to submit line-item budgets with invoices, the organization must report to the GC the actual BHRR costs per quarter and how much funding is being rolled over to the next quarter. This will help us troubleshoot any issues prior to the end of the grant period.

# Deliverable- Based Contract & Audits

- Please be aware that DHCS intends to conduct audits on *most* organizations receiving BHRR funding. Consequently, we strongly encourage all our grantee organizations to maintain meticulous records detailing the use of BHRR funds. Funds awarded must exclusively support BHRR strategies.
  - The **Budget vs Actuals template** is provided as a resource.
- Failure to use these funds appropriately by the end of the period of performance in January 2025 will necessitate their return to DHCS. If a grantee fails to meet deliverable compliance and must prematurely end the project, all equipment purchased with BHRR funds must be returned.

# Invoices FAQ



**Do we invoice our actual expenses on the “Activities/Deliverables” section, or 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?**



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



**When will we get our check?**

# Quarterly Reports and Data Collection





# Quarterly Reports and Data Collection

- Quarterly reports are **mandatory** for grantees.
- Quarterly reports are due **15 days** after the end of the reporting quarter.
- AHP must receive the quarterly reports **prior** to approving invoices.



# Sustainability Action Plan (SAP) is due no later than **December 20, 2023.**

- Choose **one or two domains** from the Program Sustainability Assessment Tool (PSAT) where the organization scored lower. These areas should be considered **priority for improvement** within the organization's funded site.
- This plan pertains to the **entire funded organization**—not just the BHRR project or specific departments.
- **Multiple Sites:** If the organization has received BHRR funding for multiple sites, please provide a plan for **each funded site** under the organization.
- If the organization has received funding for other BHWD projects (MIP, PWI/EPOC), the SAP must be completed only once.
- The sustainability goals in the IP are specific to **BHRR strategies**. The PSAT SAP, however, is **comprehensive**, addressing broader organizational aspects and aiding in **strategic planning**.

## Behavioral Health Workforce Development (BHWD) Sustainability Planning Tip Sheet



The Program Sustainability Assessment Tool (PSAT) was developed through the Center for Public Health Systems Science, a public health research and evaluation center at the Brown School at Washington University in St. Louis. They define [sustainability capacity](#) as “the ability to maintain programming and its benefits over time.” Building sustainability capacity includes identifying and strengthening structures and processes that exist within a program to ensure the capacity to adapt to changes and manage challenges.

### Developing a PSAT Sustainability Action Plan

While Grantee Coaches and Advocates for Human Potential's (AHP's) Subject Matter Experts are available to provide thought partnership, the PSAT website offers guidance and resources tailored to this exact process. The PSAT website offers assistance on understanding the domains, interpreting PSAT assessment results, and developing a Sustainability Action Plan.

### PSAT Website Navigation

When beginning to review the PSAT results and draft a PSAT-based Sustainability Action Plan, use the PSAT website as a first step in finding the guidance and resources needed to complete this task.

From the [PSAT website](#), access information, guidance, and resources by clicking on the Plan icon.



Resource provided 11/20/23 via Constant Contact

# Upcoming Events and Important Reminders

Phase B Training and Technical Assistance – Quarter 3 of BHRR							
Q	Month	Week 1	Week 2	Week 3	Week 4	Week 5	Total Hours of Live Grantee Attendance per Month
3	January	<b>Webinar:</b> Responsive Leadership: Creating Healing-Centered Workspaces <b>(1 Hour) 01/04/24 12-1p.m.</b>		<b>Q2 Data Report and Q2 Invoice Due 01/15/24</b>  <b>Workshop:</b> Responsive Leadership <b>(1.5 Hours) 01/17/24 11a.m.-12:30p.m.</b>		<b>Update Implementation Plan(s)</b>	<b>2.5 Hours + 1:1 with GCs</b>  <b>SMEs as needed</b>
3	February	<b>Webinar:</b> Baselines and Benchmarks: Using Data to Craft a Workforce Plan <b>(1 Hour) 02/07/24 12-1p.m.</b>		<b>Workshop:</b> Using Data to Craft a Workplan <b>(1.5 Hours) 02/21/24 11a.m.-12:30p.m.</b>		<b>Update Implementation Plan(s)</b>	<b>2.5 Hours + 1:1 with GCs</b>  <b>SMEs as needed</b>
3	March	<b>Webinar:</b> The Power of Partnership: A Path to Advocacy and Equity <b>(1 Hour) 03/06/24 12-1p.m.</b>		<b>Workshop:</b> Advocacy Roadmaps <b>(1.5 Hours) 03/19/24 11a.m.-12:30p.m.</b>		<b>End of Q3 – Update Implementation Plan(s)</b>  <b>Reminder: Q3 Data Report and Q3 Invoice(s) Due 04/15/24</b>	<b>2.5 Hours + 1:1 with GCs</b>  <b>SMEs as needed</b>

Note: This document is a tentative plan and is subject to change. You will receive notification about changes to this plan in advance via email and through communication from your GC. Please refer to this plan for a general guideline of what to expect in Quarter 3 of BHRR. The BHRR Team may offer optional Open Office Hours if needed. Those dates will be communicated in advance.

## Acronyms:

BHRR: Behavioral Health Recruitment and Retention

SME: Subject Matter Expert

GC: Grantee Coach

TA: Technical Assistance

# Questions?

Please enter questions in the Q&A box,  
contact the grantee coach, and/or email  
[CA\\_BHRR@ahpnet.com](mailto:CA_BHRR@ahpnet.com)







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*Thank you!*

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