



# 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, January 18, 2024**



# Indigenous Land Acknowledgement

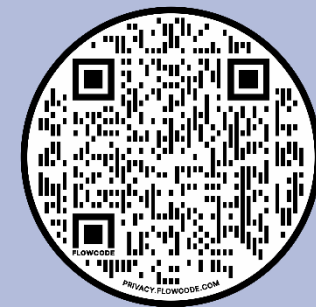
- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California 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



# 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.



# BHWD Initiative: PWI and EPOC AE Team

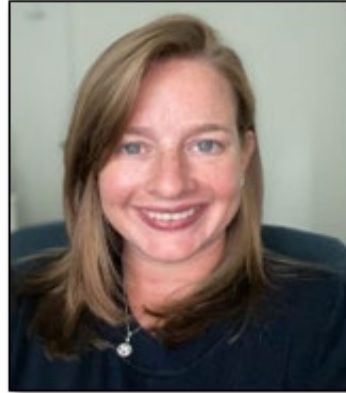
## Advocates for Human Potential (AHP)



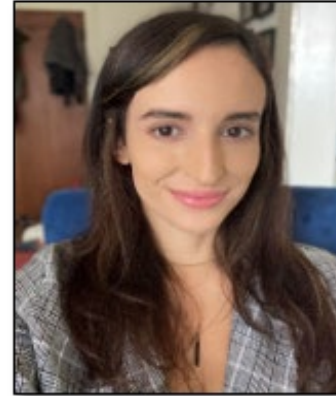
**Susan Lange**  
BHWD  
Program Director



**Tammy Bernstein**  
PWI/EPOC  
Project Director



**Kate Cox**  
BHWD  
Operations Manager



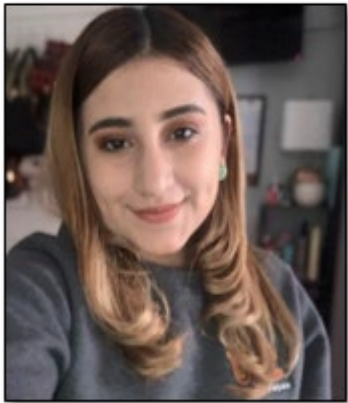
**Kayla Halsey**  
BHWD  
Data Manager



**Caitlin Storm**  
BHWD Quality  
Assurance



**Brett Hall**  
PWI/EPOC  
Lead Grantee Coach



**Rosy Larios**  
PWI/EPOC  
Grantee Coach



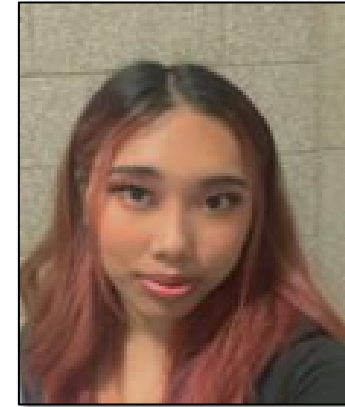
**Rachael McDavid**  
PWI/EPOC  
Grantee Coach



**Rue Mansour**  
PWI/EPOC  
Grantee Coach



**Neyat Tefery**  
BHWD  
Ops Specialist



**Vic Walker**  
BHWD  
Ops Specialist



**Krislyn LaCroix**  
BHWD  
Ops Specialist

# Agenda



1. Diversity, Equity, Inclusion (DEI) Poll Question
2. Reminder: Attendance Requirement
3. AHP Audit Guidance
4. BHWD Supplemental Events
5. PWI/EPOC 2024 Events Grantee Presenter Survey
6. Reminder: Financial Worksheets Timeline
7. Reminder: Public Facing Contact Roster
8. January Two-Track Event Details
9. February Two-Track Event Details
10. PWI/EPOC Data Updates
11. Upcoming Events
12. Q&A/Open Discussion



## DEI Poll Question

- The July 2024 Learning Collaborative, entitled “How to Create a DEI Plan for Your Organization,” will be presented by the AHP DEI Department.
- To inform this event and tailor it to PWI/EPOC grantee needs, our speaker would like to gather some information.
- Please respond to the following poll:

***Does your organization already have a DEI Strategic Plan in place?***

# Contractual Requirement: Attendance

- **For grantees to meet the contractual attendance requirement:**
  - At least **one representative** must attend mandatory webinars and administrative coaching calls.
  - At least **two staff members** must attend mandatory learning collaboratives.
  - The mandatory events must be attended **LIVE**.
  - The **attendance form** must be filled out by all representatives in attendance.
- **Grantees are unable to “make up” missed events.**
  - If grantees cannot attend a mandatory event, Grantee Coaches (GCs) must be notified **2 weeks beforehand**, unless the absence is due to unforeseen extenuating circumstances (health issue, personal emergency, etc.).
  - **Approval is required** for grantees to miss events and will only be given if 1) there is an event that prevents all grantee staff from attending, or 2) grantee expresses that the event content is remedial for staff.

*\*All upcoming event dates and [Zoom registration links will continue to be added to the monthly newsletter and general hub](#)*

# Contractual Requirement: Attendance

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)
<b>Time Commitment</b>	1 hour/month	1 hour/month	3 hours/quarter	Depends on need, 30–60 minutes/month	Depends on interest/need
<b>PWI and EPOC Coordinator</b>	Highly encouraged	Required	Highly encouraged	Required	Highly encouraged
<b>Total Attendees Required</b>	At least 1 representative	At least 1 representative	At least 2 representatives	At least 1 representative	Depends on interest/need

*Reminder: Attendance at mandatory events is a PWI/EPOC required deliverable in your executed contract. If all deliverables are not met for the quarter, your invoice may not be approved.*



# AHP Audit Guidance

- **Initial Audit Request:**

- Proof of insurance for entire duration of contract.
- Most recent completed financial, compliance, or single federal audits completed within the last 3 years.
- Copy of documented internal controls or standard operating procedures that relate to the BHWD project, such as:
  - Approval processes for payroll/timesheet submissions.
  - Procurement and accounting procedures for purchases of goods and services.
  - Policies directly related to the program performance, compliance, or deliverables for the BHWD project.
- Inventory tracking list as required by the BHWD Subcontractor Agreement.
- Detailed financial statement of activity or expenditures for the BHWD project (broken down by individual transactions).
- Completion of internal controls questionnaire (questionnaire provided by auditor during audit).
- Confirmation of payments received by grantee from AHP (letter provided by auditor during audit).

- **Grantee-Specific Follow-Up Audit Request:**

- Documentation proving completion of deliverables in the SOW as well as the TTA/Implementation Plan.
- Documentation such as timesheets, paychecks, invoices, receipts, etc. related to purchases listed in the grantee's financial statement of activity.

# BHWD Initiative

## Supplemental 2024 Events



- With the start of the new year, the BHWD Initiative has made all project webinars available to all grantees.
- PWI and EPOC grantees are able to attend Mentored Internship Program (MIP) and Behavioral Health Recruitment and Retention (BHRR) webinars as **supplemental** learning.
- MIP and BHRR grantees may also choose to participate in PWI and EPOC webinars.
- The aim is for all BHWD Initiative grantees to have access to additional TTA. All webinar recordings and materials have also been made available across projects.
- MIP and BHRR webinars will be shared with PWI and EPOC grantees via the monthly newsletter.
- To register for a live webinar, visit the [General Hub](#)
- To view past webinar recordings or materials, please visit “Past Event Resources” on the General Hub.

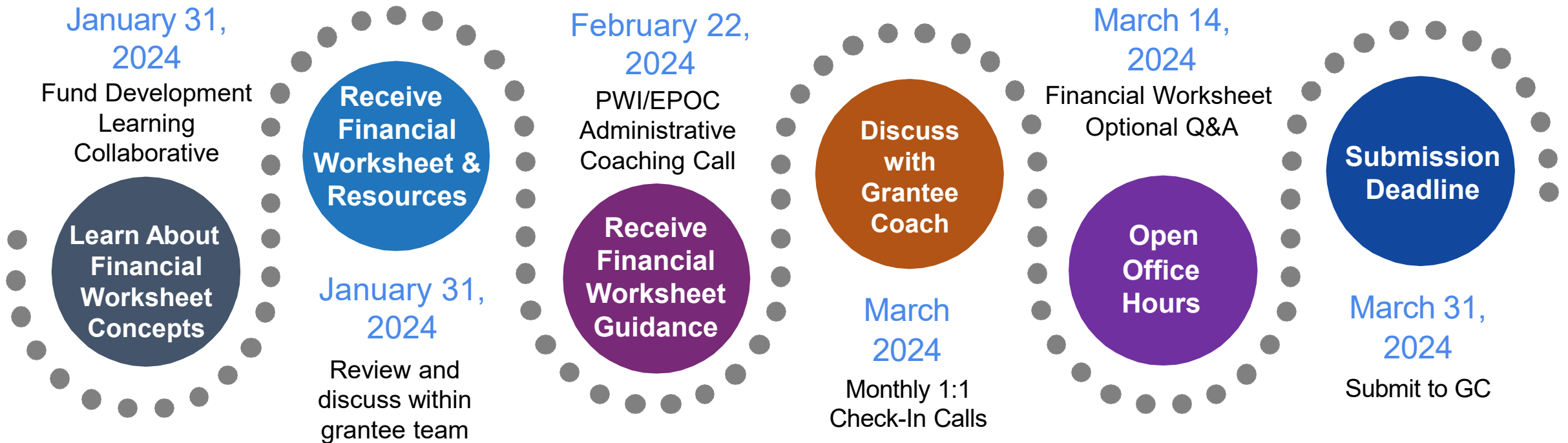
# PWI/EPOC 2024 Events Grantee Presenter Survey



- The PWI/EPOC Team will be sending out an optional survey regarding upcoming 2024 events.
- Please respond to this survey if your organization has experience with grant writing and would potentially like to be part of a future event panel.
- The survey will also ask whether your organization has expertise in and could potentially provide a presentation on any other topics.
- The PWI/EPOC Team will identify opportunities in the 2024 event schedule to include grantees wherever possible.
- The deadline to complete the [PWI/EPOC 2024 Events Grantee Presenter Survey](#) is **Friday, January 26, 2024.**

# Reminder: Financial Worksheet Timeline

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



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.”**



# Reminder: PSAT Next Steps

**Deadline: January 31, 2024**

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

# 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.

# January Two-Track Event Details (1/22/24)

## Nonprofit Fiscal Management

-	Foundational Track	Advanced Track
<b>Learning Goals</b>	<ul style="list-style-type: none"> <li>• Creating a budget (timeline, components)</li> <li>• Roles and training for all levels (staff, Board) (recruiting for board members)</li> <li>• Difference between financial review and audit (funder audit vs. organization-led audit)</li> <li>• Financial reports: pros and cons for each type</li> </ul>	<ul style="list-style-type: none"> <li>• Budget review process (key staff, Board)</li> <li>• How to assess your Board's level of understanding in finances</li> <li>• Hiring a CPA/auditor: qualifications and best practices for changing contractors</li> <li>• Best practices with preparing and sharing financial reports for Board meetings</li> </ul>
<b>Target Audience</b>	<ul style="list-style-type: none"> <li>• Individuals new to nonprofit fiscal management</li> <li>• Those seeking a solid understanding of basic financial principles</li> <li>• Participants who are interested in establishing a strong foundation for their organization's fiscal practices</li> <li>• Organizational staff involved in program management, coordination, or administration</li> </ul>	<ul style="list-style-type: none"> <li>• Financial management staff with experience in nonprofit settings (CFOs, grant managers, Board members, program directors, etc.)</li> <li>• Organizational leaders who are looking to refine their fiscal strategies</li> <li>• Those interested in exploring advanced topics to enhance, challenge, or expand their financial management skills</li> </ul>

# February Two-Track Event Details (2/12/24)

## SWOT/Strategic Planning

-	Foundational Track	Advanced Track
<b>Learning Goals</b>	<ul style="list-style-type: none"><li>• Best practices for the strategic planning process</li><li>• Understanding the importance of including stakeholders</li><li>• How to develop the structure to create and implement a strategic plan</li></ul>	<ul style="list-style-type: none"><li>• Reflecting on past strategic planning sessions to improve the experience for all stakeholders</li><li>• Knowing the right people, tools, and experts to bring into the process</li><li>• Creating steps to ensure follow-through on the plan</li></ul>
<b>Target Audience</b>	<ul style="list-style-type: none"><li>• Individuals from new nonprofit organizations (less than 5 years)</li><li>• Organizations that have not previously undertaken strategic planning</li></ul>	<ul style="list-style-type: none"><li>• Individuals from nonprofit organizations at least 5 years old</li><li>• Organizations that have previously undertaken strategic planning</li></ul>



# PWI and EPOC Data Updates



- Reminder: The Quarterly Data Report (QDR) was due by January 16, 2024. If you have not submitted the QDR yet, please do so as soon as possible, as your report is now **overdue**.
- 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.
- Please send any data questions to [bhwddata@ahpnet.com](mailto:bhwddata@ahpnet.com).

# Upcoming Events

Upcoming Events	Date and Time (PT)	Required?
Two-Track Webinar: Nonprofit Fiscal Management	Monday, 1/22/24 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)
Two-Track Webinar: SWOT/Strategic Planning	Monday, 2/12/24 12 p.m. to 1 p.m.	Yes (one representative)
Administrative Coaching Call: February 2024	Thursday, 2/22/24 12 p.m. to 1 p.m.	Yes (one representative)

*Please access the [PWI and EPOC General Hub](#) to register for events through May 2024 and add them to your calendar.*

# Q&A





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



**Thank You**