



Peer Workforce Investment (PWI) and Expanding Peer Organization Capacity (EPOC) Administrative Coaching Call

Presented by: PWI/EPOC Administrative Entity (AE) Team
Behavioral Health Workforce Development (BHWD)

Thursday, March 21, 2024



Indigenous Land Acknowledgement

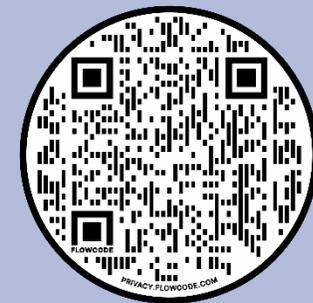
- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California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



Agenda



1. PWI and EPOC Staff Update
2. Financial Worksheet Next Steps Timeline
3. PWI/EPOC Data Updates
4. Billing Submission Change and New Invoice Templates
5. Medi-Cal Billing Open Forum
6. March Two-Track Event Details
7. 4/1/24-6/30/24 TTA Chart
8. Upcoming Events
9. Future Events Preview
10. PWI/EPOC General Hub Update
11. Q&A/Open Discussion

BHWD Initiative: PWI and EPOC AE Team

Advocates for Human Potential (AHP)



Susan Lange
BHWD
Program Director



Tammy Bernstein
PWI/EPOC
Project Director



Abigail Pol
PWI/EPOC
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
PWI/EPOC
Ops Specialist



Vic Walker
BHWD
Ops Specialist



Krislyn LaCroix
BHWD
Ops Specialist

Financial Worksheet Next Steps Timeline

REMINDER:

The PWI and EPOC Financial Worksheet is due to your Grantee Coach via email by **Monday, April 1, 2024**.

Link to [Excel](#) | Link to [PDF](#)



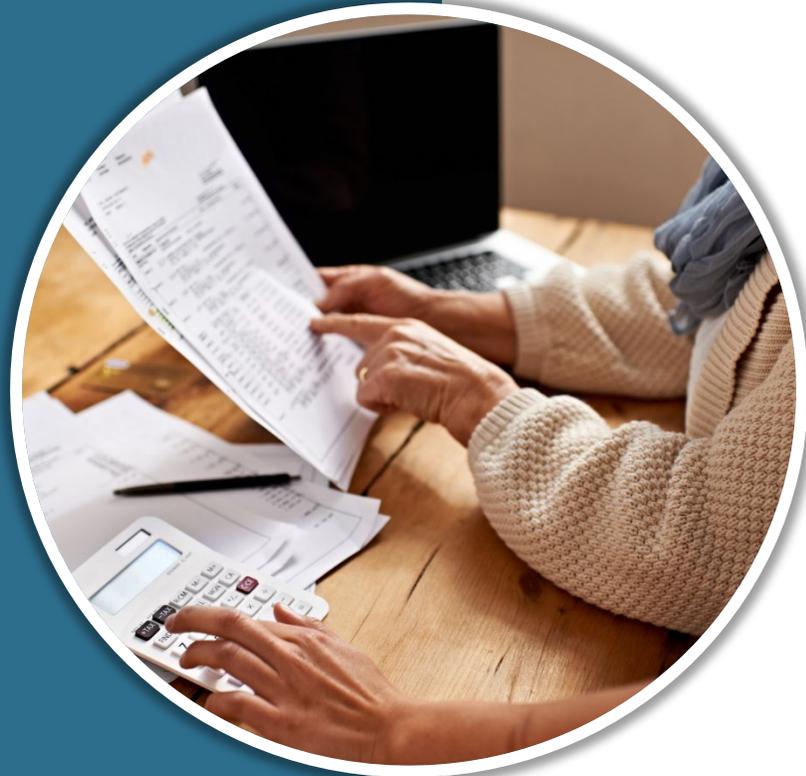
Following the submission deadline, grantees will begin working on the next PWI and EPOC Implementation Plan goal: **Integrating financial worksheet findings into overall organizational development.**



PWI and EPOC Data Updates

- Reminder: All grantees should be collecting and tracking data **now** for the next Quarterly Data Report (QDR), due April 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.
- Please send any data questions to bhwddata@ahpnet.com.

Billing Submission Change and New Invoice Templates



- The AHP Finance Department has made some updates to the BHWD invoicing process for improved efficiency.
- PWI and EPOC Grantees will now submit to a **program specific** inbox: PWI_EPOCR2invoices@ahpnet.com.
- New versions of the PWI and EPOC Invoice Templates have been created to reflect this change and can be found on the General Hub: [Templates and Forms – PWI/EPOC - BHWD \(buildingcalhhs.com\)](https://buildingcalhhs.com).
- The billing submission change and new invoice templates will be effective starting **April 1, 2024**.
- Please follow this new guidance for the payment period Jan. 1, 2024-March 31, 2024 (invoice due by April 15, 2024). If you do not use the updated inbox and template, it will delay the invoicing process and payment.



Medi-Cal Billing Open Forum

Thursday, March 28, 2023

12 p.m.-1:30 p.m. via Zoom

- We invite you to join us for the upcoming **PWI and EPOC Open Forum on Medi-Cal Billing** for peer support services.
- This optional event is designed to foster collaboration and knowledge-sharing.
- The open forum will spotlight the experiences of three PWI/EPOC Grantees: Turning Point Community Program, NAMI Sacramento, and The Happier Life Project.
- BHWD staff will be in attendance to provide technical support and facilitate Q&A/open discussion. This event will not be recorded.

April Two-Track Event Details (April 8, 2024)

Service Tracking and Data Integration

Category	Foundational Track	Advanced Track
Learning Goals	<ul style="list-style-type: none">• Know the difference between qualitative and quantitative data collection and how to manage both.• Understand how service-tracking data can be streamlined toward future funding.• Understand best practices for ethical data collection.• Be familiar with different data management tools.	<ul style="list-style-type: none">• Understand how service-tracking data can be streamlined toward future funding.• Know how to combine data with partnering organizations to advocate for systems change.• Understand best practices on protecting clients' information, such as who analyzing the data and how the data is used to tell a story.• Be familiar with different data management tools.
Target Audience	<ul style="list-style-type: none">• Staff who are new to service tracking and data management tools and techniques.	<ul style="list-style-type: none">• Staff who have an established database system and several years of experience in data management.

PWI and EPOC Round 2 Quarter 4 (4/1/24-6/30/24) TTA Chart

Round 2 Training and Technical Assistance (TTA): Quarter 4 (4/1/24–6/30/24) of Peer Workforce Investment (PWI) and Expanding Peer Organization Capacity (EPOC)							
Q	Month	Week 1	Week 2	Week 3	Week 4	Week 5	Minimum Total Hours of Live Grantee Attendance per Month
3	April	Financial Management Worksheet Due April 1, 2024	Webinar (Two Tracks): Service Tracking and Data Integration (1.25 hours) April 8, 2024 12 p.m. - 1:15 p.m.	Q3 Data Report and Q3 Invoice Due April 15, 2024 Administrative Coaching Call: (1 hour) April 18, 2024 12 p.m. - 1 p.m.	Update Implementation Plan(s) Learning Collaborative: SUD and OUD (3 hours) April 24, 2024 1 p.m. - 4 p.m.		5.25 hours and 1:1 with Grantee Coach (GC)
3	May			Webinar (Two Tracks): Program Evaluation (1.25 hours) May 13, 2024 12 p.m. - 1:15 p.m.	Update Implementation Plan(s) Administrative Coaching Call: (1 hour) May 23, 2024 12 p.m. - 1 p.m.		2.25 hours and 1:1 with GC
3	June		Webinar: How to Develop a Fundraising Plan (1 hour) June 10, 2024 12 p.m. - 1 p.m.	Administrative Coaching Call: (1 hour) June 20, 2024 12 p.m. - 1 p.m.	End of Q4 Update Implementation Plan(s)		2 hours and 1:1 with GC

Upcoming Events

Upcoming Events	Date and Time (PT)	Required?
Open Forum: Medi-Cal Billing	Thursday, 3/28/24 12 p.m.-1:30 p.m.	No
Two-Track Webinar: Service Tracking and Data Integration	Monday, 4/8/24 12 p.m.-1:15 p.m.	Yes (one representative)
Administrative Coaching Call: April 2024	Thursday, 4/18/24 12 p.m.-1 p.m.	Yes (one representative)
Learning Collaborative: SUD and OUD	Wednesday, 4/24/24 1 p.m.-4 p.m.	Yes (two representatives)

Access the [PWI and EPOC General Hub](#) to register for events and add them to your calendar.

Future Events Preview

Event Type	Topic	Day	Date	Time
Two-Track Webinar	Program Evaluation	M	May 13, 2024	12 p.m.-1:15 p.m.
Admin Coaching Call	N/A	TH	May 23, 2024	12 p.m.-1 p.m.
*Affinity Group	Homelessness	TH	June 6, 2024	12 p.m.-1:15 p.m.
Webinar	How to Develop a Fundraising Plan	M	June 10, 2024	12 p.m.-1 p.m.
Admin Coaching Call	N/A	TH	June 20, 2024	12 p.m.-1 p.m.
Webinar	Disaster Preparedness	M	July 8, 2024	12 p.m.-1 p.m.
Admin Coaching Call	N/A	TH	July 18, 2024	12 p.m.-1 p.m.
Learning Collaborative	How to Create a DEI Plan	W	July 31, 2024	1 p.m.- 4 p.m.
Webinar	Multi-Step Framework—BH Workforce	M	August 5, 2024	12 p.m.-1 p.m.
Admin Coaching Call	N/A	TH	August 22, 2024	12 p.m.-1 p.m.

Future Events Preview

Event Type	Topic	Day	Date	Time
Webinar	Retention and Pipeline Creation	M	September 9, 2024	12 p.m.-1 p.m.
Admin Coaching Call	N/A	TH	September 19, 2024	12 p.m.-1 p.m.
Webinar	Marketing and Branding	M	October 7, 2024	12 p.m.-1 p.m.
Admin Coaching Call	N/A	TH	October 17, 2024	12 p.m.-1 p.m.
Learning Collaborative	De-Escalation and Conflict Resolution	W	October 30, 2024	1 p.m.- 4 p.m.
*Affinity Group	Grief	T	November 12, 2024	1 p.m.-12:15 p.m.
Webinar	Human Trafficking Prevention and Mitigation	M	November 18, 2024	12 p.m.-1 p.m.
Admin Coaching Call	N/A	TH	November 21, 2024	12 p.m.-1 p.m.
Webinar	Grant Closeout Celebration	M	December 9, 2024	12 p.m.-1 p.m.
Admin Coaching Call	N/A	TH	December 19, 2024	12 p.m.-1 p.m.

PWI and EPOC General Hub Update

Resources



[Templates and Forms](#)



[Quarterly Reports and
Implementation Plan](#)



[Grantee Request
Form/Help Desk](#)



[Past Event Resources](#)



[Video Tutorials](#)



[Outward Facing Roster](#)



[Supplemental BHWD
Events](#)

Q&A





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



Thank You