

**Behavioral
Health
Workforce
Development**



Peer Workforce Investment

**Request for Applications
Announced
June 3, 2021**

**Application Due Date:
July 2, 2021
5:00 p.m. PT**

A Joint Effort by Advocates for Human Potential, Inc. (AHP), the Self Help and Recovery Exchange (SHARE!), and the California Association of Mental Health Peer Run Organizations (CAMHPRO) funded by the California Department of Health Care Services (DHCS) Community Services Division



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Behavioral Health Workforce Development

Goal

The California Department of Health Care Services (DHCS) is committed to statewide expansion of the behavioral health peer-run workforce to improve consumer access to and productive participation in behavioral health services throughout the state. As part of this commitment, DHCS contracted with Advocates for Human Potential, Inc. (AHP) to implement this Behavioral Health Workforce Development Project (BHWD).

The overarching goal of BHWD is to expand, elevate, enhance, and empower behavioral health peer-run programs in every California community. Through this **Peer Workforce Investment (PWI) Request for Applications (RFA)**, AHP will award grants to:

- Expand peer-run behavioral health program staffing and capacity to assist people;
- Elevate the profile of behavioral health peer-run programs with other entities in their communities and statewide through outreach and collaboration;
- Enhance the quality of peer-run programming statewide through education, training, and improved monitoring and supervision; and
- Empower peer-run programs to realize their full potential, including through strategic planning, and management support.

For purposes of this RFA, a peer is defined as an individual who has self-identified as having lived experience with the process of recovery from mental illness, substance use disorder (SUD), or both, either as a consumer of services related to these conditions, or as the parent or family member of the consumer.

Objectives

California's peer-run behavioral health programs are critically positioned to support the overall expansion of the state's behavioral health peer-run workforce through their pivotal role of facilitating access to care, supporting retention in services, and advocating for their fellow consumers throughout their recovery process. Through program expansion and enhanced collaboration with health and social services and other systems, peer-run programs can help move California closer to its goal of equity in behavioral health services throughout every county in the state.

To help achieve these larger goals, BHWD has four (4) inter-related objectives:

Objective 1. Expand the number of mental health and SUD peer staff through increased and targeted recruitment, including strategies to recruit peers in communities of color and bilingual peers; training and education; and establishment of livable wages through salaries and viable career paths, and/or stipends for peers in training.

Objective 2. Improve access to behavioral health peer support services for individuals with SUDs, including expansion of referral patterns and pathways from hospitals, emergency departments (EDs), correctional facilities, SUD treatment programs, collaborative treatment courts, and other key stakeholders, and through increased outreach efforts through multifaceted engagement approaches, including in-person, online, telehealth, apps, and other strategies.



Objective 3. Expand peer-run programs’ information technology (IT) and telehealth infrastructure. Expansion efforts could include purchase of equipment (i.e., laptops, tablets, desktop computers, computer monitors, webcams, cellular telephones, modems, wireless routers, hotspots, provider kiosks, data terminal and computer network equipment), as well as software licenses, internet subscriptions (e.g.: broadband) and telehealth training.

Objective 4. Implement activities to develop peer-run programs’ capacity and infrastructure in preparation for the new Medi-Cal peer support services benefit, including minor remodeling of facilities, purchase of office equipment, furnishings, modular offices, telephone networks, reproduction and printing equipment, office, facility, and clinical supplies, office equipment, and staff training.



Peer Workforce Investment Funding Opportunity

Request for Applications (RFA) Overview

Through this RFA, AHP seeks to identify grantees to expand behavioral health peer-run programs throughout California. Applicants with 49 or fewer employees may apply for up to \$500,000 and applicants with 50 or more employees may apply for up to \$750,000 for an approximately nineteen (19)-month period commencing July 1, 2021 and ending February 14, 2023.

Behavioral Health Peer-Run Program Expansion to Support Improved Behavioral Health Care in California

Peer Workforce Investment (PWI) funds may be used to expand behavioral health peer-run programs as described in the above objectives (see pages 3-4).

This **PWI grant** provides a rare opportunity to invest in behavioral health peer-run programs' capacity and infrastructure to "set the table" for the future Medi-Cal peer support services benefit, which is to become available for billing in 2022. The purpose is not narrowly to increase the number of behavioral health peers, but rather to develop such programs' staff competence, certification, and capacity for increased service volume and collaboration with other provider types as well.

AHP is seeking applications from behavioral health peer-run programs, with special interest in receiving applications from programs reaching underserved communities, including programs that offer bilingual and cultural expertise and those in rural settings.

All funds must be expended by February 14, 2023. There is no rollover, with all unused funds being forfeited by the peer-run program and DHCS. It is, therefore, critical for applicants to develop realistic projects that can achieve project objectives and expend their full budgets within the 19-month grant period.

Funding Information and Project Timeline

PWI grants will be awarded in amounts up to \$500,000 to programs with 49 or fewer employees and up to \$750,000 to programs with 50 or more employees per program site for an approximately 19-month period ending February 14, 2023.

Contracts will cover activities for the following period: July 1, 2021, through February 14, 2023. Due to federal restrictions, carry-over of funds is not allowable. Any funds not used by February 14, 2023, will be forfeited.

IMPORTANT DATES*

RFA Release Date

June 3, 2021

Informational Webinar

June 10, 2021

12:00–1:00 p.m. PT

Question Submittal Deadline

June 18, 2021

Notice of Intent (Optional)

June 21, 2021

Application Deadline

July 2, 2021

5:00 p.m. PT

Projected Award Announcement

August 2021

Welcome & Orientation Webinar

August 2021

These dates are subject to change. Attend the informational webinar on June 10th to be enrolled for updates.



Funding may be used for staff working directly on the project, supplies, limited capital improvements, workforce development, and other start-up and specified costs. Agreements are subject to the approval of the AHP as authorized by DHCS.

Applicants are required to adhere to the budget guidelines included in this RFA and must submit a proposed budget using the BHWP budget template included in the online application. Applications that do not conform to this template will not be considered. All items budgeted must be inclusive of all costs, including taxes and fees in U.S. dollars.

Following a technical review and scoring of each application, budgets will be reviewed to ensure costs are allowable, reasonable, and linked to the described objectives. Only applicants that meet these criteria will be considered for funding. Funding awards are merit-based with no guarantee that applicants will be awarded their full request amount.

Applicants are required to submit a budget to assist the application review team in establishing cost reasonableness for specified deliverables in the final fixed price amount awarded to the site. Selected grantees will be paid an advance payment for their full first quarter payment deliverable upon execution of contract with subsequent quarter payments contingent on the submission of quarterly reports detailing successful progress towards and completion of deliverables on a quarterly basis.

Applicants must abide by standard funding restrictions as determined by DHCS and as described on pages 12-13 of this RFA.

Use of Funds

Funds may be used for a wide range of activities that address the project objectives. Below are some examples of activities that AHP seeks to fund:

- Improvement of peer-practice delivery systems, including electronic note taking, referral systems, and record-keeping, following best practices and community standards of care. This may include purchasing software and hardware (laptops, desktops, tablets, etc.) to enable or improve the support of people and record management services.
- Staff training in areas related to behavioral health peer-run program best practices.
- Recruitment and training of peer staff, especially those who are bilingual and/or in communities of color.
- Development of outreach, training, mutual referral patterns, and opportunities to collaborate with other systems, including medical and social services (including housing), law enforcement and judicial, to educate them about the availability and benefits of engaging with peer supports for their demographic.
- Minor facility remodeling necessary for improved behavioral health peer-run program functioning and improved care, including items such as a modular office installation, Americans with Disabilities Act (ADA) compliant entries, new signage, and furnishings.
- Development of new print or online educational materials for relevant groups about the availability of behavioral health peer-run program services at the awardee's location.



- IT and telehealth infrastructure and equipment, including cell phones, hotspots, provider kiosks, internet subscriptions, etc.

NOTE: Successful applicants must meet federal and state funding restrictions, reporting, and compliance requirements noted later in this RFA.

Eligibility Criteria

Behavioral health peer-run programs that meet all the following criteria are encouraged to apply:

- Are located and provide services in the state of California;
- Have valid nonprofit status (501(c)(3)) in 2021;
- Are peer-run, defined as a program or organization that employs at least fifty-one percent (51%) of staff as peers with full-time equivalent status, including management and board members;
- Have provided behavioral services, including either direct or indirect peer services, for an uninterrupted period of no less than 2 years prior to June 1, 2021. If COVID caused delays in service, providers must have 2 years of service prior to the public health emergency.

An applicant entity may submit up to two (2) applications for funds to be used at two (2) distinct behavioral health peer-run program locations.

Application Priority Scoring

Priority will be given to:

- Behavioral based peer-run programs operating in regions with high rates of SUD, overdose, suicide, and attempted suicide, and/or underserved communities as evidenced by their project description in #1 section of their application and plans to concentrate outreach to people with high need.
- Behavioral health peer-run programs with underdeveloped referral pathways or no developed referring patterns from sites with high need (i.e., homeless shelters, treatment programs, hospitals, jails, EDs, treatment courts) and project plans to focus on improved community collaboration and mutual referral development.

Grant Requirements and Mandatory Participation

Grantees must participate in coaching and training opportunities to expand the behavioral health workforce. These opportunities will be specified by AHP throughout the grant period with DHCS authorization and at a minimum will include:

Learning Collaboratives

Grantees will be required to participate in a minimum of three (3) and up to six (6) regional Learning Collaborative (LC) meetings. The LCs will be a combination of online and in-person meetings, public health guidance permitting, with a minimum of a 2-hour meeting per each online LC and 5-hour in-person meeting per LC, throughout the course of the grant period. One (1) online LC will occur in the calendar year 2021 and no LCs will occur in 2023; LC scheduling for 2022 will be specified after grantee awards are issued.

At least two (2) staff members must attend each LC meeting. Applicant budgets must include funds for



travel, at least one-night lodging, and per diem for a minimum of two (2) personnel to participate in up to two (2) in-person LC meetings as specified in the budget template of the application to occur in the 2022 calendar year.

Webinars and Coaching Calls

In addition to the LC meetings, grantees must agree to participate in coaching calls on a minimum quarterly basis and attend a minimum of four (4) webinars. In-person site visits may also be scheduled by the grantee liaison and/or technical assistance and training personnel.

42 CFR Part 2

Selected applicants shall comply with the regulations set forth in 42 CFR Part 2, to ensure maintenance of the appropriate data protocols as part of infrastructure development and staff training, including the responsibility for assuring the security and confidentiality of all electronically transmitted patient material. Applicants should review the 42 CFR Part 2 privacy and the Substance Abuse and Mental Health Administration (SAMHSA) confidentiality rules at <https://www.samhsa.gov/sites/default/files/how-do-i-exchange-part2.pdf> . Programs selected for funding must commit to operate in compliance with the regulations.

Data and Reporting Requirements

Grantees shall comply with the regulations set forth in 42 CFR Part 2, including the responsibility for assuring the security and confidentiality of all electronically transmitted patient material, including the HIPAA privacy and SAMHSA confidentiality rules, and a commitment to operating in compliance with the regulations. Grantees shall comply with any federal or state data reporting requirements.

Quarterly Progress Reports and Final Report

Grantees must submit quarterly progress reports responding to the performance measures identified in their contracts. Potential performance measures may include, but are not limited to the following:

- Number of individuals experiencing behavioral health conditions served or impacted by the behavioral health peer-run program expansion funds.
- Number of persons served in the peer-run facility.
- Of the individuals served, percent (%) who received peer support services.
- Number of peer staff hired, trained, and MediCal certified according to the statewide standards.
- Demographic data of peer staff:
 - Number of peer staff who are aged 17 and under/18-24/25-44/45-64/65 and over/unknown;
 - Number of peer staff who are male/female/transgender/non-binary or gender queer/unknown;
 - Number of peer staff who are African American or Black/American Indian or Alaska; Native/Asian/Native Hawaiian or Pacific Islander/ /White/Other/unknown;
 - Number of peer staff who are Latinx or Chicanx or Hispanic/Not Latinx or Chicanx or Hispanic/unknown;
 - Number of peer staff who are fluent in one or more non-English languages.
- Demographic data of people served:
 - Number of clients receiving peer support services who are aged 17 and under/18-24/25-44/45-64/65 and over/unknown;



- Number of people receiving peer support services who are male/female/transgender/non-binary or gender queer/unknown;
- Number of people receiving peer support services who are African American or Black/American Indian or Alaska Native/Asian/Native Hawaiian or Pacific Islander/White/Other/unknown;
- Number of people receiving peer support services who are Latinx or Chicanx or Hispanic/Not Latinx or Chicanx or Hispanic/unknown;
- Number of people receiving peer support services who speak a language other than English at home.

Performance measures may be revised as needed to address current situations and high priority challenges.

Progress reports will follow the below timeline.

Quarter	Reporting Period	Report Due
1 st Quarter	7/1/2021 – 9/30/2021	10/15/2021
2 nd Quarter	10/1/2021 – 12/31/2021	1/15/2022
3 rd Quarter	1/1/2022 – 3/31/2022	4/15/2022
4 th Quarter	4/1/2022 – 6/30/2022	7/15/2022
5 th Quarter	7/1/2022 – 9/30/2022	10/15/2022
6 th Quarter	10/1/2022 – 12/31/2022	1/15/2023
7 th Quarter & Final Report	1/1/2023 – 2/14/2023	2/28/2023

Grantee Billing and Payment

Contingent on funds being made available to AHP by DHCS, grantees will be awarded on a deliverable-based contract. Both grantee invoicing and payments will be based on contract-specified deliverables (not itemized invoices) and with grantees being paid fifty percent (50%) of their first quarter budget upon contract execution and the remaining fifty percent (50%) upon demonstrating completion of or successful progress towards their quarterly deliverable tasks. Deliverable-based contracts mean that grantees must demonstrate progress on agreed-upon tasks in their Scope of Work (SOW) and their data reporting of process measures (e.g., number of staff and peers trained) and service measures (e.g., number of unique people receiving peer services) on a quarterly basis to have their quarterly invoices approved for payment. No itemized invoices are required; however, programs must maintain auditable financial records demonstrating appropriate use of funds.

All grantee awarded funds must be expended no later than February 14, 2023.

Application Instructions

The **PWI RFA** application process is straightforward. The entire application is all contained in an online fillable form that you are encouraged to review and print before beginning to complete. Although the application is streamlined, you must consider:

- Does your behavioral health peer-run program site meet the **Eligibility Criteria** described on page 7?
- Can your behavioral health peer-run program help achieve the **BHWD Objectives** listed on pages 3-4?



Your application may be given priority scoring if your project is characterized by elements described on page 7.

Notice of Intent (Optional)

If your organization plans to submit an application for a Peer Workforce Investment grant, please notify us of your intent by June 21, 2021 by completing a brief online form at <https://survey.alchemer.com/s3/6371990/PWI-Notice-of-Intent>.

Completing the [Notice of Intent](#) is a non-binding statement to give the **BHWD** team an idea of who is interested in applying. You will receive an email confirmation receipt of your completed “Notice of Intent” after it has been received. Peer-run organizations completing the Notice of Intent also will receive email notifications of any updates to the Frequently Asked Questions.

Online Application

The [PWI online application](#) must be completed in full and submitted by **5:00 p.m. Pacific Time on July 2, 2021** at <https://survey.alchemer.com/s3/6372102/PWI-RFA-Online-Application>.

Instructions to complete the fillable form are included in the online application. **NO ATTACHMENTS ARE PERMITTED AS PART OF THIS APPLICATION.**

You will be able to work on your online application, save your work, and return to it at your convenience. However, once submitted, no further changes can be made to your application. Upon submission, you will receive an email confirming your application’s receipt. **It is the applicant’s sole responsibility to ensure that your application has been successfully submitted and received.**

Application Components

The online application includes five (5) components. Your responses to these application components will be used in the project application scoring and selection process. The scoring criteria is described on page 12 of this RFA.

1) Your behavioral health peer-run program description (25 points)

Provide information about your program’s current infrastructure, service provision (and services you’d like to provide but are not now providing), your target population(s), need for peer-services in your community (such as overdose rates in your county; see <https://discovery.cdph.ca.gov/CDIC/ODdash>), and other information you believe is relevant to your funding request.

2) Your proposed PWI project (25 points)

Describe your project.

- What are you requesting funding to do? Please ensure that the expansion activities you

Application Resource Box

Join us for an [informational webinar](#) **June 10, 2021, at 12:00–1:00 p.m. PT** to learn more about the **PWI RFA** and ask questions. **Register at:**

https://zoom.us/meeting/register/tJAld-gqpzsuGdlW6WvkW4dOI1Eg_CGvQ2dz

- Complete the [Notice of Intent](#) (NOI) form (optional) by June 21, 2021.
- For additional questions, email: kwest@ahpnet.com or tbernstein@ahpnet.com

All questions must be received by June 18, 2021. Answers to all questions received by then will be sent to all who have submitted a NOI.



propose have buy-in from your organization, as well as key stakeholders if relevant, and are ready for *immediate* implementation.

- Refer to BHWD objectives on pages 3-4 and Use of Funds on page 6 for examples of activities that can be supported with **PWI** funds and demonstrate an understanding of DHCS intended use of this funding.

3) Your quarterly project implementation plan and associated deliverables (20 points)

- Describe what activities your program will take in Q1 – Q7 (July 1, 2021 – February 14, 2023) to achieve your project’s objectives. These do not need to be exact but must demonstrate your program’s concrete plan for incorporating proposed activities into your organization’s current workflow.
- Use SMART objectives (Specific, Measurable, Achievable, Relevant, and Time-oriented) to specify how you will implement your project.
- State what your planned deliverables will be for each quarter. You may have multiple deliverables in each quarter, and some may carry over from quarter to quarter. These will be the basis for the Scope of Work in your grant award. For example, if you propose to recruit new bilingual staff as part of your project, describe how many, when you expect to start and finish, where you will do this, why you need them, and how they will contribute to your agency’s expanded workforce and capacity to engage new people.

4) Your project staffing and capability to achieve your objectives (15 points)

- Who and what will be funded by your proposed project? If salaries are to be funded, identify staff that will help implement your project and estimated percent time (FTE) will be allocated to their **PWI** tasks. If contractors or consultants will be used, identify what functions/roles they will fulfill to help achieve your project objectives.
- If you propose to support staff with **PWI** funds, keep in mind that existing support **cannot** be supplanted with these funds.

5) Your project’s itemized budget (15 points)

- Describe your personnel and contractor/consultant costs, along with other direct and indirect expenses, in the online budget template.
- Describe your anticipated quarterly expenses that pair with your deliverables for purposes of billing and receipt of payment on a quarterly fixed price basis.

You are encouraged to write out your answers on the worksheet provided and copy and paste the answers into the fillable application form whenever possible to make your application process as easy as possible.

NOTE: There are strict word limits for each section. It is acceptable to use bullets, lists, and incomplete sentences to streamline your application and the application review process to facilitate a quick turnaround from application receipt to scoring to award announcement to project initiation and funding.



Application Scoring

Section I: Behavioral Health Peer-Run Program Description -- Rating Factors (25 pts)
1. How well is their current infrastructure and staffing capacity described? For example, what services are offered now? How are they connected (or not) to other services in their community? (Note: a lack of connection is not a reason to be denied funding).
2. How well does the applicant describe the availability of services, or lack thereof, in their catchment area overall? What is the need for peer services in their community? Are they in a high-need community? For example, is the incidence of overdoses or survivors of suicide high in their service area?
3. How well does the applicant describe their target population? Who are the people being served? For example, do they focus on a specific age group, self-identified group at high risk (eg: LGBTQIA, veterans) etc.?
4. Does the application provide other relevant information about their program? For example, are they located at a physical site in the community, do primarily street outreach with an off-location office, etc.?
Section II: Proposed BHWP Project Description -- Rating Factors (25 pts)
5. To what extent does the applicant clearly describe their proposed project?
6. To what extent does this project align with the goals and objectives of BHWP funding to support California’s behavioral health workforce expansion overall?
Section III: Quarterly Implementation Plan and Quarterly Deliverables Rating Factors (20 pts)
7. To what extent does the applicant describe their quarterly activities and related deliverables?
8. To what extent does the applicant use SMART objectives (Specific, Measurable, Achievable, Relevant, and Time-Oriented) to describe their project implementation?
9. To what extent does the applicant provide a clear, logical, and achievable implementation plan overall? Do the activities described for all seven (7) quarters achieve their overall project?
Section IV: Staffing and Capability -- Rating Factors (15 points)
10. How well does the applicant describe who will be responsible for implementing the project? For example, if more than one staff or consultant will be funded, are the roles and functions of these personnel specified and tied to the completion of the implementation plan?
Section V: Itemized Budget -- Rating Factors (15 pts)
11. Using the fillable budget form, to what extent does the applicant describe their expected expenses, including personnel, consultants, indirect, capital expenditures, fees, registration costs, travel expenses, etc. and pair these quarterly activities with related deliverables for each quarter? (Grantees will be paid based on quarterly reports of deliverables and progress toward deliverable completion).

DHCS Funding Restrictions

DHCS will not fund the following:

- Debt retirement
- Operational deficits
- Partisan activities
- Religious organizations for explicit religious activities
- Activities that exclusively benefit the members of sectarian or religious organizations
- Purchase or lease of vehicles



- Purchase or improvement of land
- Purchase, construct, or permanently improve (other than minor remodeling) any building or other facility or purchase of major medical equipment

Only organizations utilizing the de minimis rate of 10 percent of modified total direct costs (MTDC), as defined in 45 CFR Part 75, will be selected for this funding opportunity.

Funds shall not be used for services that can be supported through other accessible sources of funding, such as other federal discretionary and formula grant funds, (e.g., HHS, CDC, CMS, HRSA and SAMHSA), DOJ (OJP/BJA) and non-federal funds, third-party insurance, and sliding scale self-pay, among others.

The U.S. Department of Health and Human Services (HHS) codified the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for HHS Awards, 45 CFR Part 75. All components of 45 CFR Part 75 are applicable to all subgrantees. In Subpart E, cost principles are described and allowable and unallowable expenditures for HHS recipients are delineated. 45 CFR Part 75 is available at <http://www.samhsa.gov/grants/grants-management/policies-regulations/requirements-principles>. Unless superseded by program statute or regulation, follow the cost principles in 45 CFR Part 75 and the standard funding restrictions below.

PWI funds must be used for purposes supported by the program and may not be used to:

Exceed the salary limitation: The Consolidated Appropriations Act, 2016 (Pub. L.113-76) signed into law on January 1, 2016, limited the salary amount that may be awarded and charged to Substance Abuse and Mental Health Services Administration (SAMHSA) grants and cooperative agreements. Award funds may not be used to pay the salary of an individual at a rate in excess of Executive Level II. The Executive Level II salary can be found in SAMHSA’s standard terms and conditions for all awards at www.samhsa.gov/grants/grants-management/notice-award-noa/standard-terms-conditions. This amount reflects an individual’s base salary exclusive of fringe and any income that an individual may be permitted to earn outside of the duties of the Applicant. This salary limitation also applies to subcontracts/subgrants under a SAMHSA grant or cooperative agreement.

SAMHSA funds were granted to DHCS, and all funding restrictions are applicable to this funding opportunity and all grant contracts.



Application Template and Worksheet for the Online Application

The online application includes the following pages for you to complete. **THIS IS A WORKSHEET, NOT THE REAL APPLICATION.**

1. Program Information and Site Description

Behavioral Health Peer Run Program Applicant Information	
Agency Name	
Street Address	
City, County, State, ZIP	
Email Address	
Telephone Number	
Website Address	
Specific Program Location and Authorized Program Representative	
Representative Name (authorized to submit application)	
Title	
Mailing Address	
City, County, ZIP	
Email Address	
Telephone Number	
City/town/county(ies) catchment areas: <hr style="border: 1px solid black;"/>	
Applicant Tax ID #	
DUNS #	
Congressional District of applicant organization's primary location	
Congressional District(s) where organization's primary beneficiaries live	
Applicant's annual budget amount average over past three (3) years	
Does applicant organization have an annual financial audit? <input type="checkbox"/> Yes <input type="checkbox"/> No	
By checking the box below, I verify that the agency listed above has attained 501(c)(3) status in California and is currently operating under this tax status. <input type="checkbox"/>	
Is your program operating within a highly affected SUD/overdose geographic area and/or a particularly underserved community? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Description of catchment area served by your peer-run program regarding SUD and mental health rates, behavioral health needs, and other relevant characteristics of community Please estimate the racial and ethnic populations that will be affected providing your best estimate of the percentage of	



ethnic/racial communities served (including Black/African American, Indigenous American or Alaska Native, Asian, Latinx, Chicanx or Hispanic, Native Hawaiian or Pacific Islander, White, Other (response limited to 500 words)

Insert text description here:

2. Peer Workforce Investment Project Description

What activities are you requesting funding for? (response limited to 500 words)

List your proposed activities (for example: specific infrastructure development, staff development, and peer recruitment, outreach, etc.) and expected outcomes of these activities after the close of grant funding.

3. Quarterly Project Implementation Plan and Deliverables

Quarter 1. 7.1.21 through 9.30.21 Project Implementation Activities and Deliverables (use SMART Objectives format) (response limited to 500 words)

Insert text here:

Quarter 2. 10.1.21 through 12.31.21 Project Implementation Activities and Deliverables (use SMART Objectives format) (response is limited to 500 words)

Insert text here:

Quarter 3. 1.1.2022 through 3.31.22 Project Implementation Activities and Deliverables (use SMART Objectives format) (response is limited to 500 words)

Insert text here:

Quarter 4. 4.1.22 through 6.30.22 Project Implementation Activities and Deliverables (use SMART Objectives format) (response is limited to 500 words)

Insert text here:



Quarter 5. 7.1.22 through 9.30.22 Project Implementation Activities and Deliverables (use SMART Objectives format) (response limited to 500 words)

Insert text here:

Quarter 6. 10.1.22 through 12.31.22 Project Implementation Activities and Deliverables (use SMART Objectives format) (response limited to 500 words)

Insert text here:

Quarter 7. 1.1.23 through 22.14.23 Project Implementation Activities and Deliverables (use SMART Objectives format) (response limited to 500 words)

Insert text here:

4. Project Staffing and Capability to Achieve Your Objectives

List 1) name (or for not yet identified staff, list “to be determined), 2) percentage time (estimated FTE), 3) role/job title, and 4) responsibility of all personnel, consultants or contractors to be funded with grant funding (response is limited to 500 words)

Insert text here:



Itemized Project Budget and Instructions

Applications are NOT required to request funds under each budget category. The budget request must be consistent with and support the project narrative described in Item #3 above.

A separate page must be completed for *each quarterly budget*, with the final page summarizing the total requested funds for all seven (7) quarters.

Entity Name	Quarter 1: July 1 - Sept. 30, 2021	Qtr. 1 Budget
I. Personnel (Salary, job title, FTE) 1. 2. 3.		
II. Payroll taxes, benefits, etc.		
III. Subcontractor costs, consultant fees, role, and FTE (% time) 1. 2. 3.		
IV. Other Direct Expenses Other Direct Expenses - Outreach (eg: Speakers Bureau, marketing) - Travel* (Learning Collaboratives, conferences, etc.) - Equipment and infrastructure supports - Other, specify:		
V. Indirect Expenses (federal indirect rate or up to 10% of direct costs)		
	TOTAL 1st Quarter:	



Entity Name	Quarter 2: Oct. 1 – Dec. 31, 2021	Qtr. 2 Budget
I. Personnel (Salary, job title, FTE) 1. 2. 3.		
II. Payroll taxes, benefits, etc.		
III. Subcontractor costs, consultant fees, role, and FTE (% time) 1. 2. 3.		
IV. Other Direct Expenses - Outreach (eg: Speakers Bureau, marketing) - Travel* (Learning Collaboratives, conferences, etc.) - Equipment and infrastructure supports -Other, specify:		
VI. Indirect Expenses (federal indirect rate or up to 10% of direct costs)		
	TOTAL 2nd Quarter:	



Entity Name	Quarter 3: Jan. 1 – Mar. 31, 2022	Qtr. 3 Budget
I. Personnel (Salary, job title, FTE) 1. 2. 3.		
II. Payroll taxes, benefits, etc.		
III. Subcontractor costs, consultant fees, role, and FTE (% time) 1. 2. 3.		
IV. Other Direct Expenses -- Outreach (eg: Speakers Bureau, marketing) - Travel* (Learning Collaboratives, conferences, etc.) - Equipment and infrastructure supports - Other, specify:		
V. Indirect Expenses (federal indirect rate or up to 10% of direct costs)		
	TOTAL 3rd Quarter:	



Entity Name	Quarter 4: Apr. 1 – June 30, 2022	Qtr. 4 Budget
I. Personnel (Salary, job title, FTE) 1. 2. 3.		
II. Payroll taxes, benefits, etc.		
III. Subcontractor costs, consultant fees, role, and FTE (% time) 1. 2. 3.		
IV. Other Direct Expenses - Outreach (eg: Speakers Bureau, marketing) - Travel* (Learning Collaboratives, conferences, etc.) - Equipment and infrastructure supports - Other, specify:		
VII. Indirect Expenses (federal indirect rate or up to 10% of direct costs)		
	TOTAL 4th Quarter:	



Entity Name	Quarter 5: July 1 - Sept. 30, 2022	Qtr. 5 Budget
III. Personnel (Salary, job title, FTE) 1. 2. 3.		
IV. Payroll taxes, benefits, etc.		
III. Subcontractor costs, consultant fees, role, and FTE (% time) 1. 2. 3.		
IV. Other Direct Expenses - Outreach (eg: Speakers Bureau, marketing) - Travel* (Learning Collaboratives, conferences, etc.) - Equipment and infrastructure supports - Other, specify:		
VIII. Indirect Expenses (federal indirect rate or up to 10% of direct costs)		
	TOTAL 5th Quarter:	



Entity Name	Quarter 6: Oct 1 - Dec 31, 2022	Qtr. 6 Budget
V. Personnel (Salary, job title, FTE) 1. 2. 3.		
VI. Payroll taxes, benefits, etc.		
III. Subcontractor costs, consultant fees, role, and FTE (% time) 1. 2. 3.		
IV. Other Direct Expenses - Outreach (eg: Speakers Bureau, marketing) - Travel* (Learning Collaboratives, conferences, etc.) - Equipment and infrastructure supports - Other, specify:		
IX. Indirect Expenses (federal indirect rate or up to 10% of direct costs)		
	TOTAL 6th Quarter:	



Entity Name	Quarter 7: Jan 1 – Feb 1, 2023	Qtr. 5 Budget
VII. Personnel (Salary, job title, FTE) 1. 2. 3.		
VIII. Payroll taxes, benefits, etc.		
III. Subcontractor costs, consultant fees, role, and FTE (% time) 1. 2. 3.		
IV. Other Direct Expenses - Outreach (eg: Speakers Bureau, marketing) - Travel* (Learning Collaboratives, conferences, etc.) - Equipment and infrastructure supports - Other, specify:		
X. Indirect Expenses (federal indirect rate or up to 10% of direct costs)		
	TOTAL 7th Quarter:	

YOU MUST GO TO: <https://survey.alchemer.com/s3/6372102/PWI-RFA-Online-Application> to complete the online application. **THESE PAGES HERE ARE ONLY A WORKSHEET.**