



# 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, July 18, 2024**



# Indigenous Land Acknowledgement

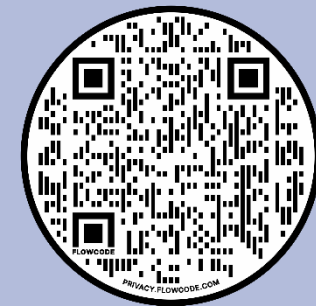
- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California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



# 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



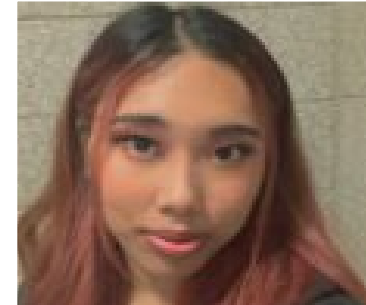
Rachael McDavid  
PWI/EPOC  
Grantee Coach



Rue Mansour  
PWI/EPOC  
Grantee Coach



Neyat Tefery  
PWI/EPOC  
Operations Specialist



Vic Walker  
BHWD  
Operations Specialist



Krislyn LaCroix  
BHWD  
Operations Specialist

# Agenda



1. PWI and EPOC Grant Reminders
2. Upcoming Events
3. Peer Data Collection: Metric Recommendations Presentation
4. Q&A/Open Discussion

# PWI and EPOC Grant Reminders

## 1:1 Meetings

- As of July 2024, PWI/EPOC Grantee Coach (GC)/Grantee 1:1 Check-In Calls have changed from monthly to quarterly (*unless your GC has specified otherwise*).

## July Implementation Plan (IP)

- The July IP updates are due prior to your original July monthly meeting occurrence (or prior to your quarterly 1:1 meeting if it will be held in July).

## 4/1/24–6/30/24 Quarterly Data Report (QDR) and Invoice

- The 4/1/24–6/30/24 QDR and invoice were due by July 15, 2024. If you have not submitted the QDR and/or invoice yet, please do so as soon as possible, as they are now overdue.

## PWI and EPOC Final Report

- The PWI and EPOC Final Report Outline will be distributed to grantees by July 31, 2024. The final report link will be made accessible to grantees starting October 1, 2024, and must be completed by the end of the contract period (January 15, 2025). The final invoice will not be paid until the final report is received.

## 7/1/24–9/30/24 TTA Chart

- The 7/1/24-9/30/24 TTA Chart is available to support with PWI and EPOC deliverable tracking for this quarter. GCs will be available for additional calls if extra support is needed during off months.



# Upcoming Events

| Upcoming Events  | Date and Time (PT)                  | Required?                 |
|--|-------------------------------------|---------------------------|
| Optional Webinar:<br>Best Practices for Peers and Clinicians Collaboration                     | Monday, 7/22/24<br>12 p.m.–1 p.m.   | No                        |
| Learning Collaborative:<br>How to Create a DEI Plan for Your Organization                      | Wednesday, 7/31/24<br>1 p.m.–4 p.m. | Yes (two representatives) |
| Webinar:<br>Multistep Framework: Five Steps to Building a Stronger Behavioral Health Workforce | Monday, 8/5/24<br>12 p.m.–1 p.m.    | Yes (one representative)  |
| Administrative Coaching Call:<br>August 2024   | Thursday, 8/22/24<br>12 p.m.–1 p.m. | Yes (one representative)  |

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

# Peer Data Collection: Metrics Recommendations

Kayla Halsey, AHP and Tirza Holden, Faces & Voices



# Peer Data Collection — Metrics Recommendations Introduction



- Purpose: To pass on lessons learned from data collection throughout this project with expertise from Faces & Voices, specifically for peer-led organizations.
  - What data to continue to collect.
  - What data to begin collecting differently.
  - What data to begin collecting post-project.
- Benefit to your organization:
  - To align yourselves with other peer-led organizations collecting these metrics.
  - To increase your likelihood of acquiring additional funding streams.
  - To contribute to the field's development of evidence-based practice.

# Peer Data Collection — Metrics Recommendations Overview

- Software evaluation
- Introduce guide
- Highlights
  - Demographics
  - Services
  - Training
  - Outcomes
- Q&A



# Software Evaluation Tool

## Software Evaluation

| Category              | Subcategory           | Importance (1-5) | Software 1 | Software 6 | Notes on Importance | Notes on Rating |
|-----------------------|-----------------------|------------------|------------|------------|---------------------|-----------------|
| <b>Implementation</b> | Timeline              |                  |            |            |                     |                 |
|                       | Training              |                  |            |            |                     |                 |
|                       | Documentation         |                  |            |            |                     |                 |
|                       | Imports               |                  |            |            |                     |                 |
| <b>Integrations</b>   | Calendar              |                  |            |            |                     |                 |
|                       | Email                 |                  |            |            |                     |                 |
|                       | Text Notifications    |                  |            |            |                     |                 |
|                       | Website               |                  |            |            |                     |                 |
|                       | County System         |                  |            |            |                     |                 |
| <b>Access</b>         | External Systems      |                  |            |            |                     |                 |
|                       | Data Reliability      |                  |            |            |                     |                 |
|                       | Segmentation          |                  |            |            |                     |                 |
| <b>Functionality</b>  | Portability           |                  |            |            |                     |                 |
|                       | Software Requirements |                  |            |            |                     |                 |
|                       | Hardware Requirements |                  |            |            |                     |                 |
|                       | Exports               |                  |            |            |                     |                 |
|                       | Co-Program            |                  |            |            |                     |                 |
|                       | Funder by Service     |                  |            |            |                     |                 |
|                       | DX Codes              |                  |            |            |                     |                 |
|                       | Group Activity        |                  |            |            |                     |                 |
|                       | Assessments           |                  |            |            |                     |                 |
|                       | Service Types         |                  |            |            |                     |                 |
|                       | Billable Codes        |                  |            |            |                     |                 |
|                       | Unit Calculation      |                  |            |            |                     |                 |
|                       | Scheduling            |                  |            |            |                     |                 |
|                       | Demographics          |                  |            |            |                     |                 |
|                       | Outcomes Tracking     |                  |            |            |                     |                 |
|                       | Visualizations        |                  |            |            |                     |                 |
|                       | Custom Reports        |                  |            |            |                     |                 |
|                       | Custom Fields         |                  |            |            |                     |                 |
|                       | Custom Assessments    |                  |            |            |                     |                 |

# Peer Data Collection Guide

## Peer-Based Data Collection: Metric Recommendations

### Background

Now that the PWI & EPOC projects are ending, we want to leave you with some lessons learned from our data collection efforts. We highly encourage you to continue data collection on your own to inform your organizational efforts and to share with potential funders and stakeholders later. We used Faces & Voices of Recovery's expertise in data analytics in the peer-led organizational space to help us develop the recommendations (listed below) for what data to continue collecting, what data to start collecting differently, and what additional data to begin collecting post-project. Following these recommendations will better position you alongside similar organizations in the behavioral health field that are tracking these metrics, contributing to the field's ability to develop evidence-based practice and effective interventions that mitigate crises in our state and increase your likelihood of acquiring additional funding streams.

## Demographic Review

### Demographics Overall

| Topic                              | Recommendation   |
|------------------------------------|--|
| <b>Profiles and Representation</b> | <p>Utilizing demographic information to characterize individuals as composites of their demographic attributes enhances data analysis capabilities and incorporates the concept of intersectionality. For example, understanding that Hispanic women aged 45–65 tend to disengage from programming earlier than Hispanic men aged 18–45 can help determine potential service gaps and staffing issues.</p> <p>Comparing the demographic profiles of staff to the population they serve, weighted by employment status (full-time equivalent or part-time equivalent), enables more comprehensive</p> |

representation analysis. This comparison can aid in identifying demographic groups that may be underrepresented in the workforce. Moreover, conducting additional analysis to determine the extent to which clinicians and peers align with the specific demographic characteristics of individuals in their caseload offers a more nuanced perspective on representation.

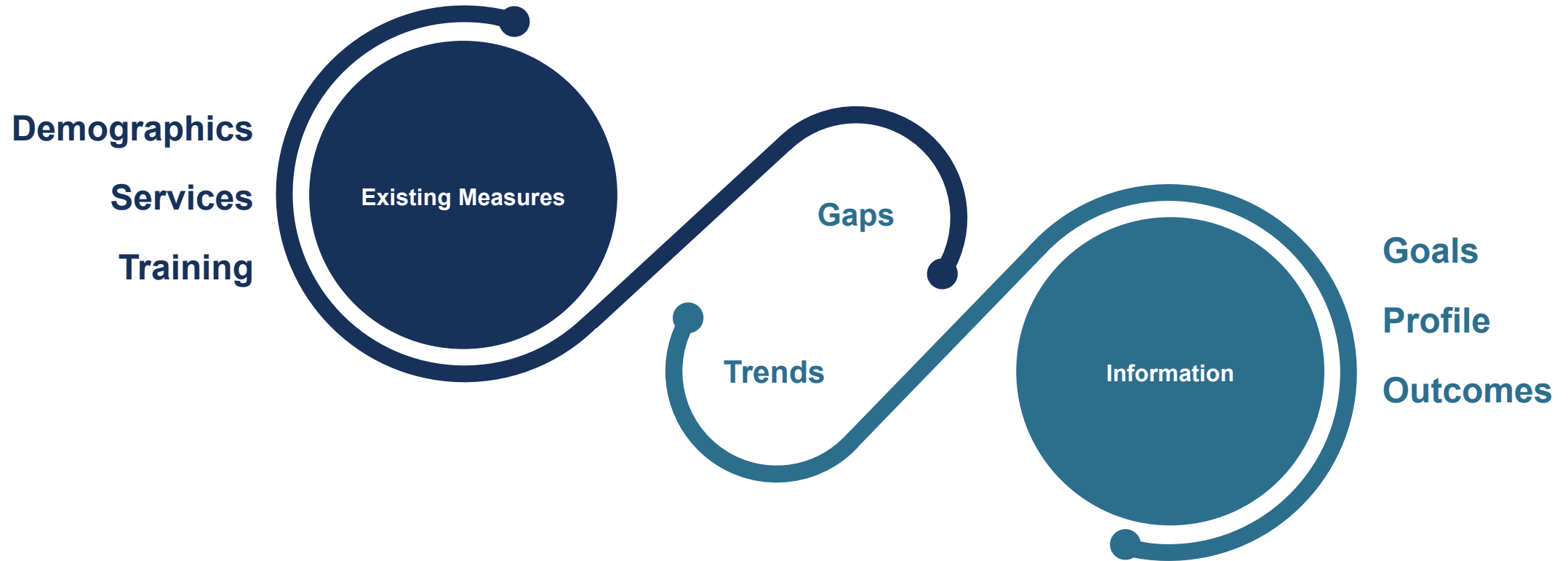
Multivariate analysis becomes particularly valuable when demographic data are considered collectively, portraying individuals as holistic entities rather than isolated data points. This approach allows for a deeper understanding of the intricate intersections of various demographic factors and their influence on outcomes or service provision.

### Demographics as Outcomes

Expanding data collection to encompass demographic variables that evolve over time can enrich outcome measurement and enhance representation analysis. For instance, gathering information on employment status could signal the necessity for referrals to job programs and, in the future, serve as evidence of program success. Additional demographic fields, such as involvement with the Department of Children and Family Services, education level, legal-system involvement, housing situation, insurance status, and transportation accessibility, among others, can provide valuable insights.

Incorporating these measures can aid in assessing the representation of individuals being served, as peers with similar histories or experiences may relate on another level that previously collected data might not capture. This comprehensive approach to data collection not only improves our understanding of the demographics of those accessing services but also

# Goal of the Review



# Demographic Review Highlights

## Profiles: Holistic View

- Intersectionality
- Representation
- Analysis

## Outcomes: Evolving Demographics

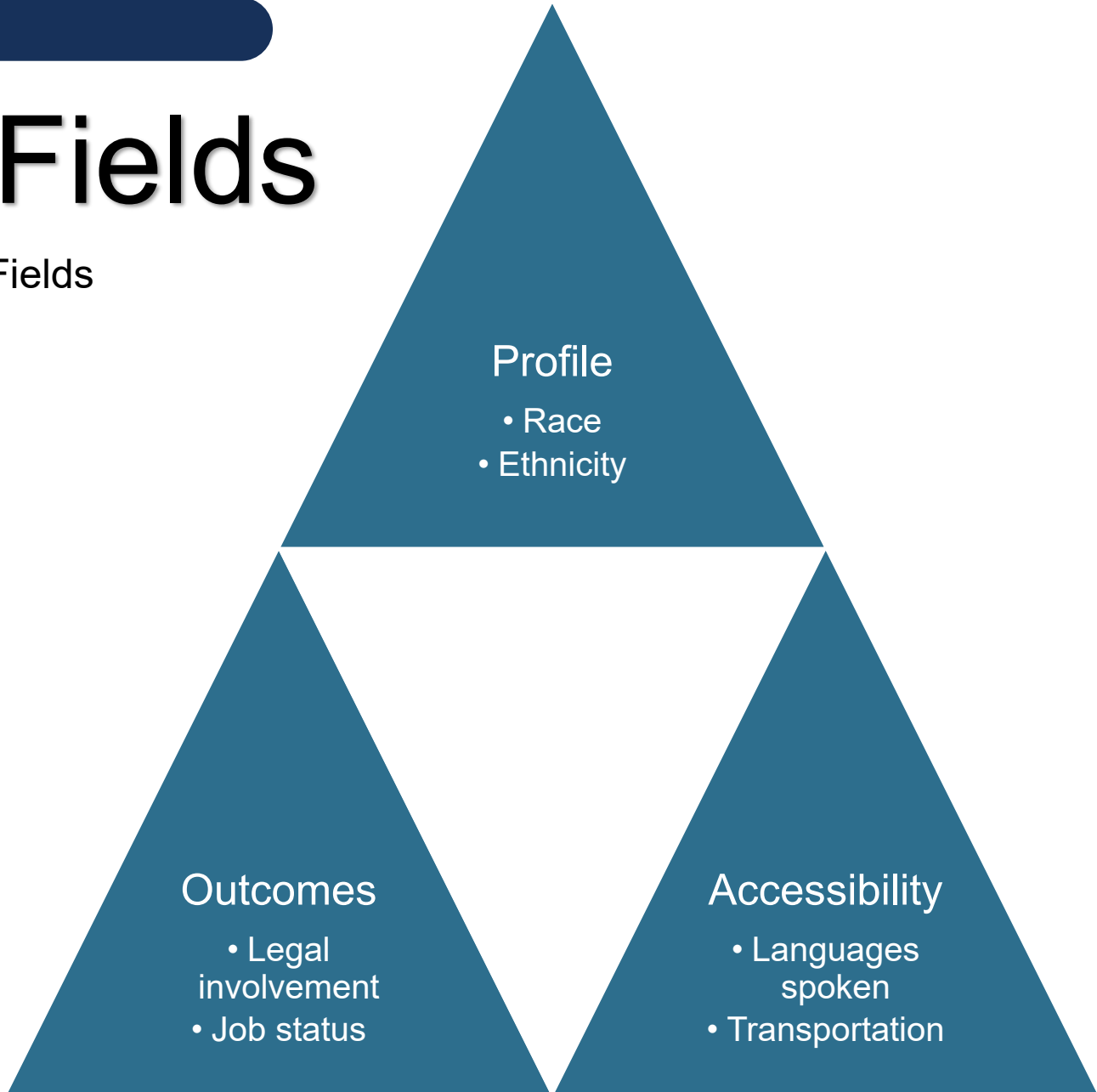
- Current Status
- Tracking
- Updates

## Accessibility: Informed Services

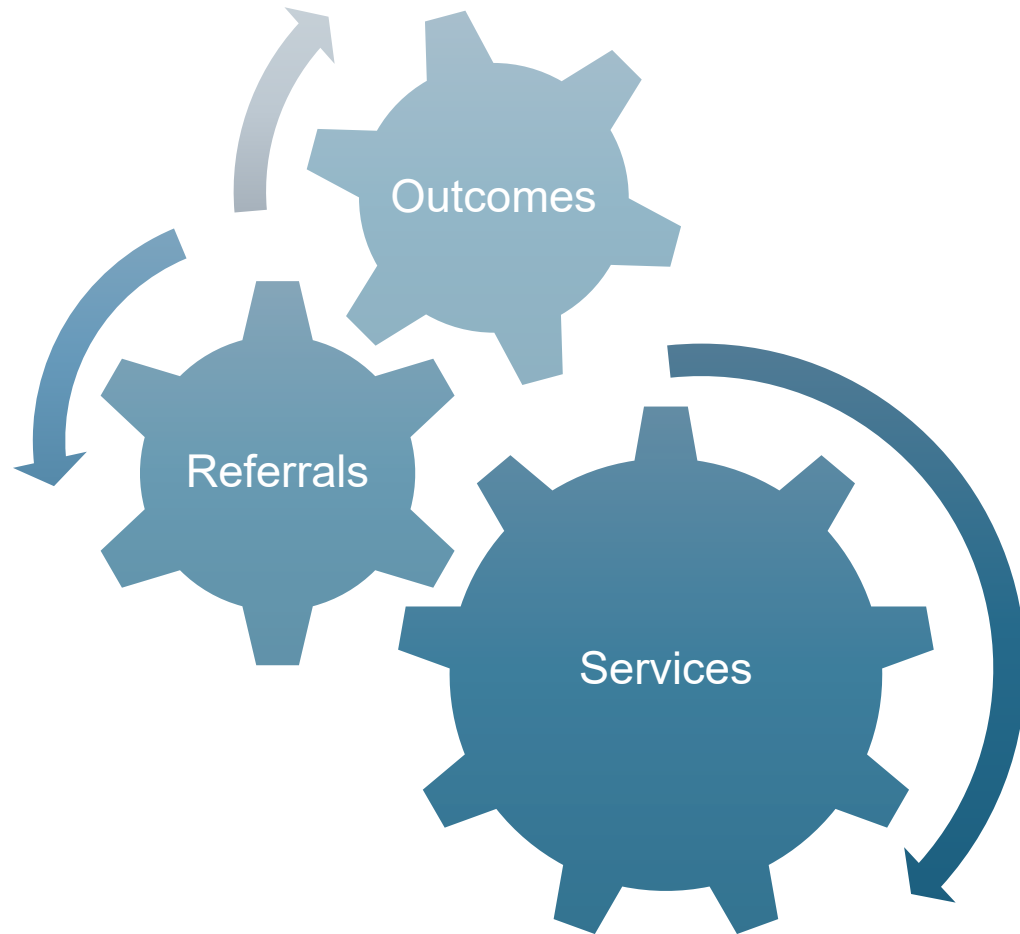
- Appropriate
- Timely
- Convenient

# Demographic Fields

Subset of Recommendations for Specific Fields



# Service Review Highlights



## Service specificity:

- Peer support for behavioral health vs. physical health vs. substance use disorder
- Best practice vs. service provided
- Service accessibility

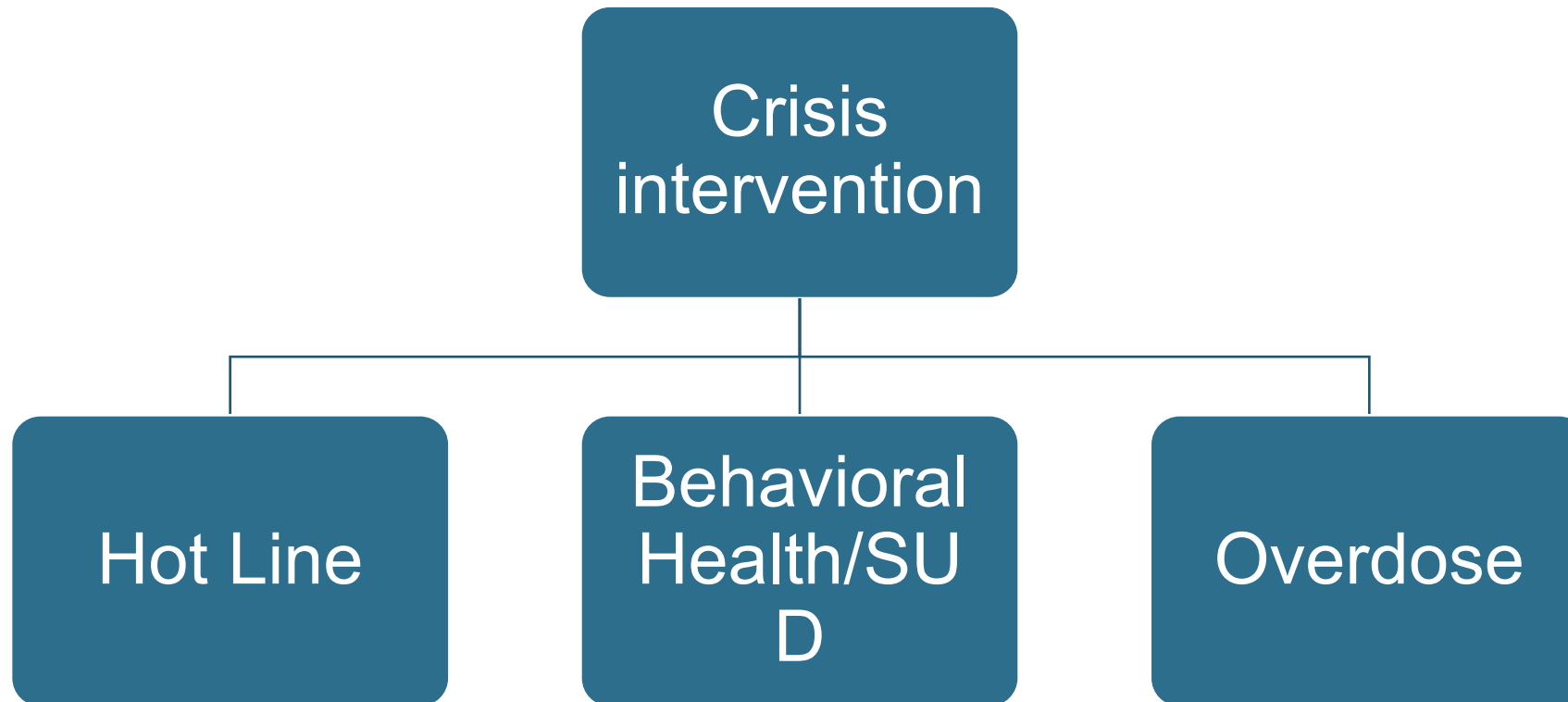
## Determine the following:

- Internal improvements
- Capacity and development
- Impact on individual



# Service Types

Subset of Recommendations for Specific Fields



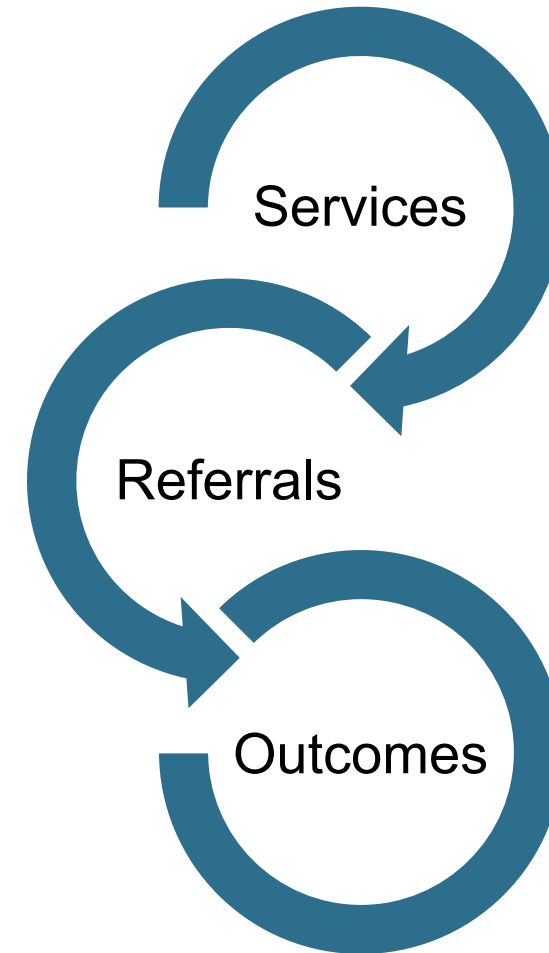
# Referral Review Highlights

Referral into insight by tracking:

- Reason for referral
- Referral status
- Referral outcome

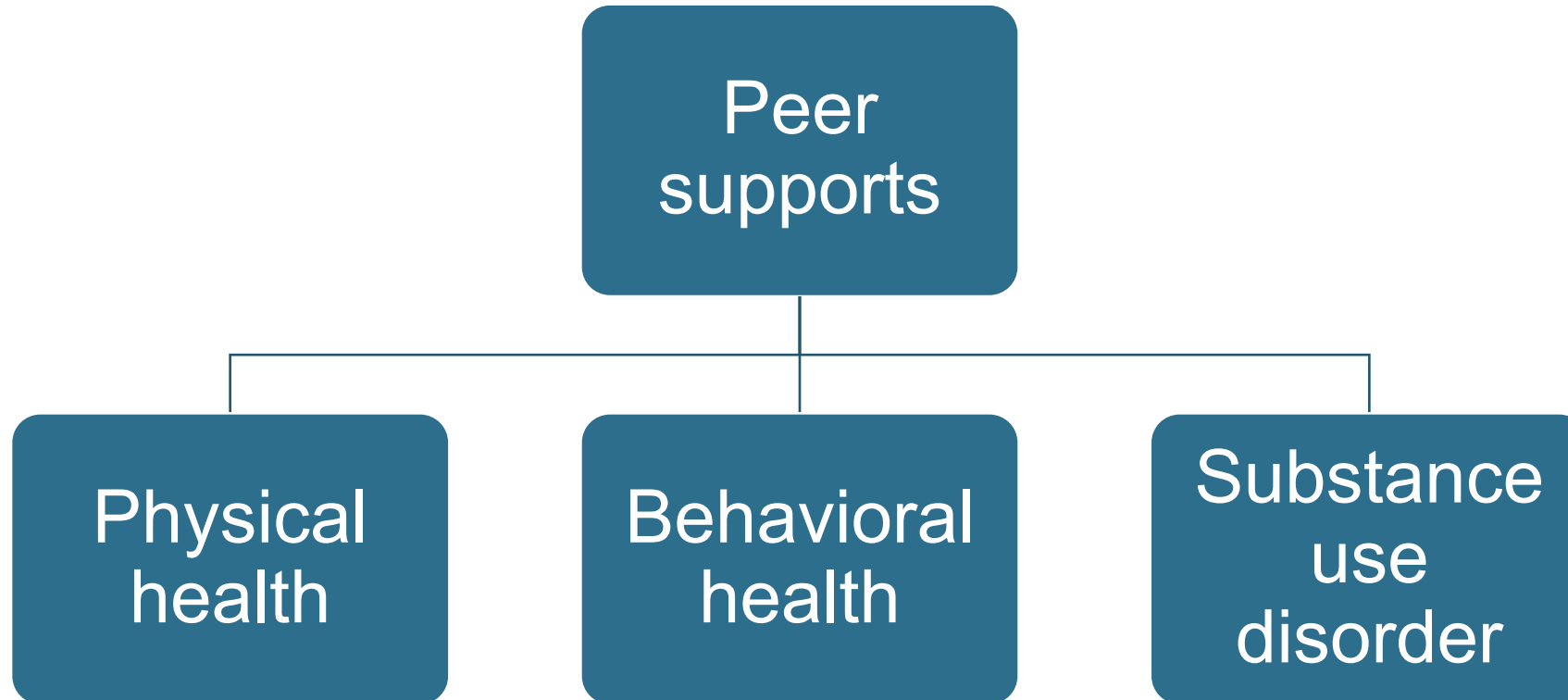
Determine the following:

- Potential need
- Appropriateness of referral
- Impact on individual



# Referral Types

Subset of Recommendations for Specific Fields



# Training Review Highlights

Training into insight:

- Skill of staff
- Areas for improvement
- Profile of organizational skills

Determine the following

- Goals and timelines
- Impact on services



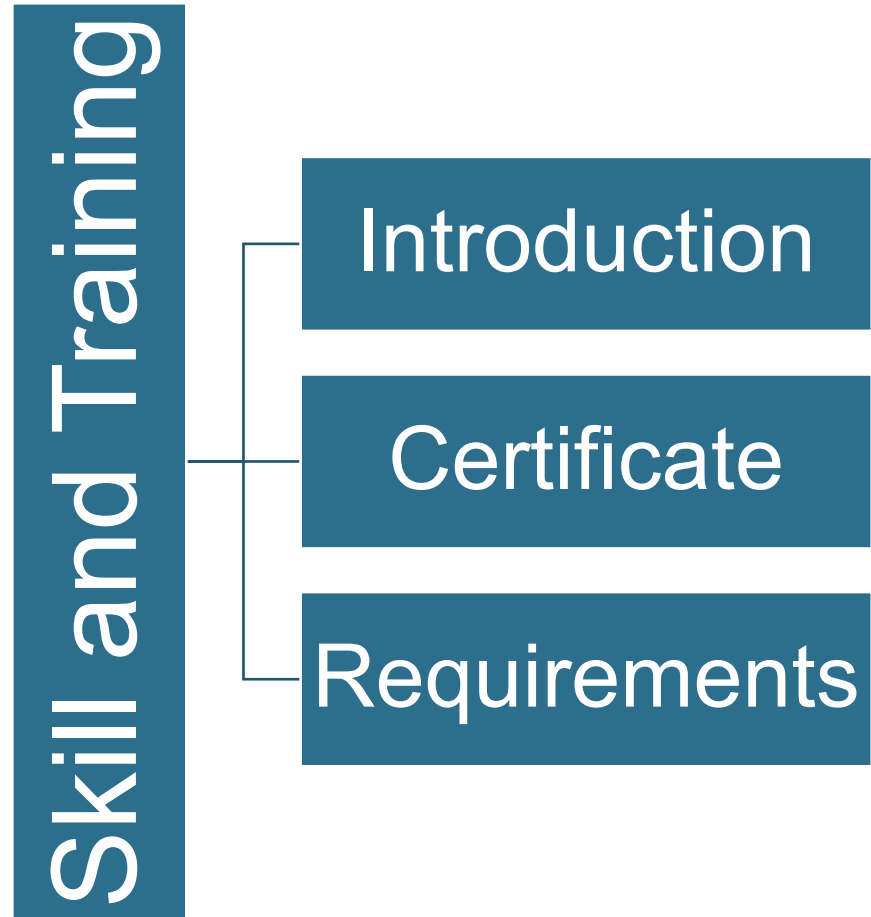
Effective  
services

Job-based  
requirements

Training  
individuals

# Training Types

Subset of Recommendations for Specific Fields



# Outcome Review Highlights

## Define

- Define measurable goals.
- Identify gaps in data.

## Monitor

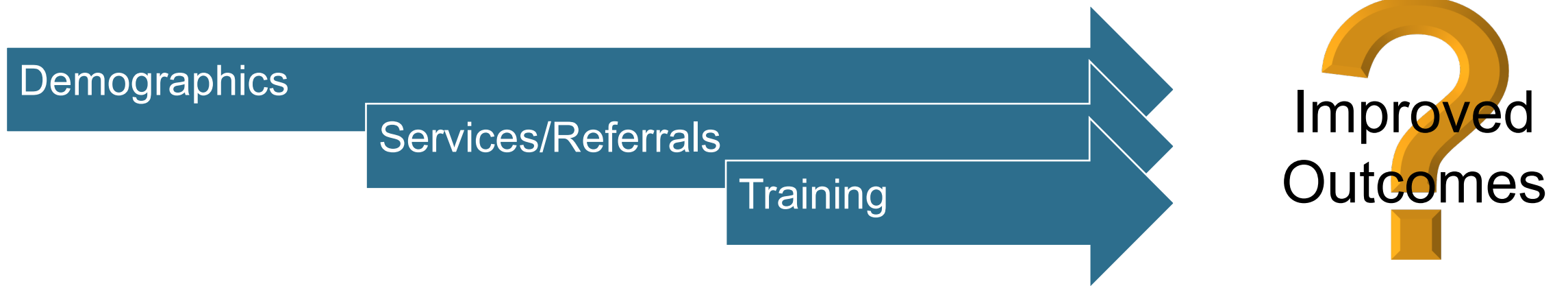
- Select tools.
- Track data.
- Schedule intervals.

## Improve

- Review outcomes.
- Process Improvement.

# Outcomes

Subset of Recommendations for Specific Fields



# Thank You!

If you would like support with data collection and/or would like to have a follow-up conversation with Tirza, please submit a TTA request via the [Grantee Request Form](#).



# General Q&A | Open Discussion





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



**Thank You**