# 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
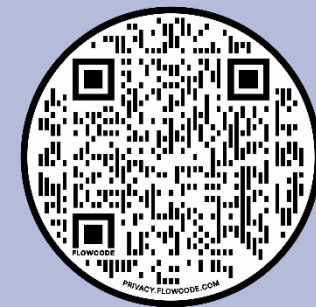
Community Agreements

- 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.

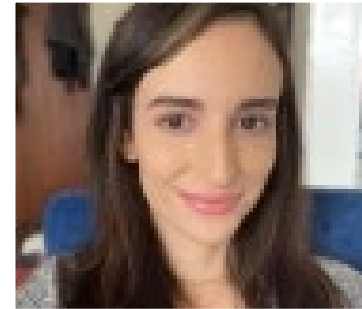# BHWD Initiative: PWI and EPOC AE Team Advocates for Human Potential (AHP)

Susan Lange
BHWD
Program Director

Tammy Bernstein
PWI/EPOC
Project Director

Abigail Pol
PWI/EPOC
Operations Manager

Kayla Halsey
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Caitlin Storm
BHWD Quality
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Brett Hall
PWI/EPOC
Lead Grantee Coach
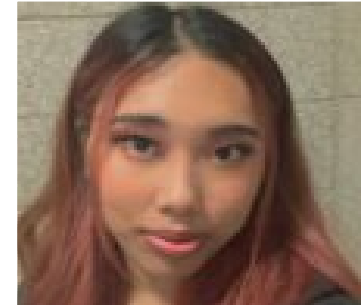
Rosy Larios
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Ops Specialist

Vic Walker
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Ops Specialist

Krislyn LaCroix
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Agenda

1. PWI/EPOC Data Updates

2. Reminder: Billing Submission Change and New Invoice Templates

3. Reminder: Financial Worksheet Next Steps Timeline

4. Financial Worksheet Next Steps Guidance

5. Medi-Cal Billing Open Forum Follow-Up

6. Reminder: TTA Data Consultations

7. May Two-Track Event Details

8. 4/1/24-6/30/24 TTA Chart

9. Upcoming Events

10. Question-and-Answer (Q&A)/Open Discussion

PWI and EPOC Data Updates

- Reminder: The Quarterly Data Report (QDR) was due by April 15, 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.

Reminder: 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).

- The billing submission change and new invoice templates will be effective starting **April 1, 2024**.

- Please follow this new guidance for the payment period January 1, 2024-March 31, 2024. If you do not use the updated inbox and template, it will delay the invoicing process and payment.

- Reminder: Invoices were due by **April 15, 2024**.

Reminder: Financial Worksheet Next Steps Timeline

Please see the timeline below for guidance on the PWI and EPOC Implementation Plan goal of *"integrating financial worksheet findings into overall organizational development."*

Complete Financial Worksheet	→	**Review Completed Financial Worksheet with Grantee Coach**	→	**Receive Financial Worksheet Next Steps Guidance**	→	**Discuss Draft Goals with Grantee Coach**	→	**Add Final Goals to Implementation Plan**	→	**Integrate Financial Worksheet Findings**
April 1, 2024 Submit to Grantee Coach		April 2024 Monthly 1:1 Check-In Call		April 18, 2024 PWI/EPOC Administrative Coaching Call		May 2024 Monthly 1:1 Check-In Call		May 31, 2024 SMART Goal format		Dec. 31, 2024 By the end of the Grant Period

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Financial Worksheet Next Steps Guidance

- Now that your organization has completed the financial worksheet, the next steps are to **integrate the findings into your overall organizational development**.

- This will be done by creating **two to three** Financial SMART (specific, measurable, achievable, relevant, and time-bound) goals.

- During April 1:1 Check-In Meetings, Grantee Coaches will review your financial worksheets and discuss potential areas of focus. Grantees will use April and May to brainstorm draft goals for their organization.

- If possible, grantees should aim to include the draft Financial SMART goals in their May Implementation Plan to review and finalize with their Grantee Coaches during the May 1:1 Check-In Meetings.

- Finalized Financial SMART goals must be submitted by **May 31, 2024**.

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

Medi-Cal Billing Open Forum Follow-Up

- Thank you again to the speakers and attendees of the PWI and EPOC Open Forum on Medi-Cal Billing for peer support services, held on Thursday, March 28, 2024.

- As follow up, the PWI and EPOC AE Team is in the process of developing a **Medi-Cal Billing (Peer Support Services) Frequently Asked Questions (FAQ) document**.

- This document will include a round up of questions/answers, resources, and helpful tips for navigating the process.

- It will be distributed to all grantees via Constant Contact and will also be posted on the General Hub once available.

Reminder: TTA Data Consultations

- Are there any key takeaways or unanswered questions from the **Data Tracking & Service Integration Webinar** held on Monday, April 8, 2024?

- As follow-up, Faces & Voices is offering tailored **TTA Data Consultations** for grantees.

- To request a TTA Data Consultation, please use the [Grantee Request Form](#) and choose the following selections:
  - ➢ Type of request: "TTA Request"
  - ➢ TTA provider: "F&V"
  - ➢ TTA topic: "Operations"
  - ➢ TTA subtopic: "Data Management/Collection"

- Include a detailed description of the type of data support the organization would like to receive (e.g., collection, tracking, analysis, management, tools/platforms).

- Remember, data is a key part of sustainability and can support in securing future funding.

May Two-Track Event Details (May 13, 2024)

Program Evaluation		
Category	**Foundational Track**	**Advanced Track**
Learning Goals	• Understand the importance of program evaluation and the role it plays in measuring success. • Understand the role that stakeholders play in evaluating a program. • Understand how to develop a logic model with evaluation questions to measure successful implementation.	• Become familiar with the best tools to use for multi-year programs. • Know to conduct process mapping using logic model components to evaluate your program. • Understand how the Precede-Proceed Model can guide the organization in the different phases of evaluation. • Have clarity on what funders typically look for in program evaluation.
Target Audience	• Those seeking a solid understanding of program evaluation methods. • Participants looking to identify the key concepts of developing an evaluation plan. • Participants with a few years of experience in implementing programs and evaluating success.	• Individuals who are familiar with program evaluation and have managed or been involved with the process for more than 2 years. • Organizations that have implemented formal program evaluation and are looking to expand on their knowledge base of best practices.

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

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Upcoming Events

Upcoming Events	Date and Time (PT)	Required?
Learning Collaborative: SUD and OUD	Wednesday, 4/24/24 1 p.m.-4 p.m.	Yes (two representatives)
Two-Track Webinar: Program Evaluation	Monday, 5/13/24 12 p.m.-1:15 p.m.	Yes (one representative)
Administrative Coaching Call: May 2024	Thursday, 5/23/24 12 p.m.-1 p.m.	Yes (one representative)
Affinity Group: Homelessness	Thursday, 6/6/24 12 p.m.-1:15 p.m.	No

*Access the **PWI and EPOC General Hub** to register for events and add them to your calendar.*

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Q&A

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