BHWD Final Grantee Report

This is your final report for the Behavioral Health Workforce Development grants (PWI, EPOC, MIP, and BHRR). Please complete the following questions to the best of your ability, reflecting on your entire experience as a grantee from start to the conclusion of the project. **MIP, PWI, and EPOC grantees, please report on all rounds of funding you have received.**

You may begin filling out and saving this report once the link becomes available in the portal. However, submissions will not be accepted until January 1, 2025 to ensure that your responses address the full duration of the grant. **All responses must be submitted by January 15, 2025.** Additionally, you may need to consult with various departments within your organization to provide comprehensive answers.

Please note that this final report is separate from your quarterly data report (QDR). You must complete both your final QDR and this final report for each awarded site to meet invoice approval requirements. If you have any questions, please contact your Grantee Coach or the BHWD Data Team at bhwddata@ahpnet.com.

ALL REQUIRED QUESTIONS HAVE AN ASTERICK (*). THIS SURVEY MUST BE SUBMITTED ONLINE IN THE GRANTEE PORTAL. PDFS WILL NOT BE ACCEPTED.

Grant-funded Site Information and Contact

* I am completing this report for the following grant project:

(If you are a grantee of more than one grant or site, you must complete a separate report for each Unique ID that was awarded.)

○ PWI

○ EPOC

○ MIP

○ BHRR

Please include the contact information for the person responsible for submitting this form.

(This is the email address that will receive the continue link to save and return to this form before final submission. This email will also be sent a confirmation email with a copy of your survey responses after you submit.)

* First Name

* Last Name

* Phone

* Email Address

* ${GrantProject} Grantee Agency Name:

○ AHP - TEST

○ Archway Recovery Services Inc

○ Aspiranet Behavioral Health Division

○ Aspiranet Family and Community Division

○ Aspiranet Residential and Education Division

○ Aspiranet Resource Family Adoption and Foster Care Division

○ Aspiranet Transition Aged Youth Division

○ Aspiranet Wraparound and Intensive Home Based Services Division

○ Bienestar Human Services Inc

○ Chinatown Service Center

○ City Impact

○ Community Clinics Health Network dba Health Quality Partners of Southern California

○ Community Health for Asian Americans

○ Community Solutions

○ Compatior Counseling Center

○ County of Riverside Riverside University Health System Behavioral Health

○ Cultivating Culturally Competent Clinicians Inc

○ Didi Hirsch Psychiatric Services dba Didi Hirsch Mental Health Services

○ East Bay Agency for Children

○ El Dorado County Community Health Center

○ El Dorado County Community Health Center Cameron Park Behavioral Health Site

○ Five Acres

○ Fred Brown Recovery Services

○ Gardner Family Health Network Inc DBA Gardner Health Services

○ Gateway Mountain Center

○ Gateways Hospital And Mental Health Center

○ Grandmas House of Hope

○ Greater Fresno Health Organization Inc

○ Health Care Integrated School Based Health SBH

○ Health Care Integrated School Based Health SBH

○ Healthy Hearts Medical Association dba Health Care Integrated Services

○ Healthy Hearts Medical Association dba Health Care Integrated Services

○ Healthy Hearts Medical Association dba Health Care Integrated Services

○ Heart and Soul

○ Higher Ground Youth and Family Services

○ Instituto Familiar de la Raza

○ Janus of Santa Cruz

○ Kings View

○ La Clínica de La Raza

○ LAGS Recovery Centers Inc

○ LGBTQ Collaborative

○ LifeLong Medical Care

○ Marys Shelter DBA Marys Path

○ Mendocino Community Health Center

○ Mental Health Association of Santa Barbara County DBA Mental Wellness Center

○ NAMI San Mateo County

○ Norooz Clinic Foundation

○ North County Health Project Inc dba TrueCare

○ One New Heartbeat

○ Orange County Asian and Pacific Islander Community Alliance

○ Palomar Family Counseling Service

○ Parents Anonymous Inc

○ Partnerships for Trauma Recovery

○ Peer Voices of Orange County

○ Penny Lane Centers

○ Petaluma Health Center

○ PHOENIX HOUSES OF CALIFORNIA INC

○ Rebekah Childrens Services

○ Redwood Community Services Inc

○ Sacramento Youth Center

○ Samuel Dixon Family Health Center Inc

○ Samuel Dixon Family Health Center Inc

○ Santa Barbara Neighborhood Clinics

○ Schranks Clubhouse

○ Serve The People

○ Southern California Health And Rehabilitation Program

○ St Johns Community Health

○ STEPS Program at El Dorado Community Health Center

○ The Happier Life Project

○ The People Concern

○ The Purpose of Recovery

○   The Village Family Services

○   Transitions Mental Health Association

○   Tule River Indian Health Center

○   Unicare Community Health Center

○   Union of Pan Asian Communities

○   Venice Family Clinic

○   Vista Community Clinic

○   Vista Hill Foundation

○   Waymakers

○   We Care Services for Children

○   Yurok Tribe

* Please enter your Unique ID.

(BHRR Example: "BHRRXXX01". This ID can be found at the top of the organization's notice of award (NOA) letter, contract, statement of work (SOW), or payment schedule.

MIP Example: "MIPXXX01". This ID can be found at the top of the organization's notice of award (NOA) letter, contract, statement of work (SOW), or payment schedule.

PWI/EPOC Example: "PWIXXX01", "EPOCXXX01". This ID can be found at the top of the organization's notice of award (NOA) letter, contract, statement of work (SOW), or payment schedule.)

Funding and Expenditures

* 1. The State of California uses a July 1 - June 30 calendar as its Fiscal Year (FY); the federal government uses October 1 - September 30 as its FY. Some organizations use the calendar year

January 1 - December 31 as their FY. Please specify which FY your organization uses.

○ California (July 1 - June 30)

○ Federal (October 1 - September 30)

○ Calendar Year (January 1 - December 31)

* 1a. What is your total operating budget for your site, ${UniqueID}?

	Previous Fiscal Year	Current Fiscal Year	Projected Next Fiscal Year
Total operating budget (US dollars)			

* 2. Please select all the funding sources your site utilized/will utilize during your previous, current, and projected next fiscal year for your site, ${UniqueID}. (Select all that apply)

☐ Grants/time-limited contracts

☐ State/federal grants

☐ County contracts

☐ Foundation grants

☐ Medi-Cal billing

☐ Donations

☐ Revenue from participant payment

☐ In-kind support value

☐ Other

* 2a. Please provide a numeric percent* of each of the funding sources for each fiscal year for your site, ${UniqueID}.

(*Each column must add up to 100.)

	Previous Fiscal Year (%)	Current Fiscal Year (%)	Projected Next Fiscal Year (%)
Grants/time-limited contracts			
State/federal grants			
County contracts			
Foundation grants			
Medi-Cal billing			
Donations			
Revenue from participant payment			
In-kind support value			
${FundingSources_OTHER}			

* 3. Please indicate the areas where the grant funds were allocated at your site, ${UniqueID} during your time as a BHWD grantee. (Select all that apply)

☐ Building rent

☐ Consultants

☐ DEIJB+ efforts

☐ Employee benefits

☐ Employee wellness, Wellness committees, wellness spaces

☐ HR improvements

☐ HR Technology

☐ Job postings

☐ Management coaching and development

☐ Marketing and branding

- [ ] Meeting space rentals

- [ ] MIP Interns (intern invoice payments, benefits training, etc.)

- [ ] Outreach, career fairs

- [ ] Peer support specialist certifiction and training

- [ ] Pipeline building/internships/intern stipends

- [ ] Recruitment bonuses

- [ ] Retention bonuses

- [ ] Salary evaluations

- [ ] Staff time, wages, fringe

- [ ] Staff training & retreats, morale building events

- [ ] Strategic/organizational development activities

- [ ] Tuition reimbursement, loan forgiveness, prep courses and licensure fees

- [ ] Website updates/redesign

- [ ] Other

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* 3a. For each item you selected, enter the dollar amount of your total grant award amount you spent in each category for your site, ${UniqueID}.

	(US Dollars)
Building rent	
Consultants	
DEIJB+ efforts	
Employee benefits	
Employee wellness, Wellness committees, wellness spaces	
HR improvements	

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HR Technology	
Job postings	
Management coaching and development	
Marketing and branding	

(US Dollars)

Meeting space rentals	
MIP Interns (Salary, benefits, training, etc.)	
Outreach, career fairs	
Peer support specialist certification and training	
Pipeline building/internships/intern stipends	
Recruitment bonuses	
Retention bonuses	
Salary evaluations	
Staff time, wages, fringe	
Staff training & retreats, morale building events	

(US Dollars)

Strategic/organizational development activities	
Tuition reimbursement, loan forgiveness, prep courses and licensure fees	
Website updates/redesign	
${AreaFunds_OTHER}	

* 4. Please enter the total number of current staff at your grant-funded site, ${UniqueID}, and their corresponding annual salaries.

Total number of staff	Total annual salaries (US dollars)

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| Full-time staff | | |
| Part-time staff | | |

*5. Please indicate your level of agreement with each of the statements below regarding the **overall impact** of this grant on your site, ${UniqueID}.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Our organization achieved the initial objectives outlined in our grant application.	○	○	○	○	○
The grant facilitated the development of valuable collaborations and partnerships that enhanced our organizational capacity.	○	○	○	○	○
Overall, the grant had a positive impact on our organization's growth and development.	○	○	○	○	○
Overall, the grant had a positive impact on helping us address workforce challenges.	○	○	○	○	○
The grant experience improved our ability to collaborate with other organizations.	○	○	○	○	○
The grant experience strengthened our organization's overall strategic planning capabilities.	○	○	○	○	○
This grant improved our organization's knowledge of best practices in behavioral health workforce development.	○	○	○	○	○

* **You will only see the following question when completing this survey in the portal if you select "PWI" or "EPOC" at the top of this survey.**

QuestionPro

5a. Please indicate your level of agreement with each of the statements below regarding the **impact of the PWI/EPOC grant** on your site, ${UniqueID}.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Participating in this grant facilitated our organization's ability to support staff with peer support specialist certification in CA.	○	○	○	○	○
Participating in this grant improved our organization's ability to bill Medi-Cal for peer services.	○	○	○	○	○
Participation in this grant improved recruitment of peer staff.	○	○	○	○	○
Participation in this grant improved retention of peer staff.	○	○	○	○	○
We faced significant challenges in identifying and recruiting peers.	○	○	○	○	○

* You will only see the following question when completing this survey in the portal if you select "MIP" at the top of this survey.

5a. Please indicate your level of agreement with each of the statements below regarding the **impact the of MIP interns** on your site, ${UniqueID}.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Interns contributed positively to our daily operations at our grant-funded site.	○	○	○	○	○
Interns helped us to increase our service capacity.	○	○	○	○	○
Interns brought new ideas and perspectives to our grant-funded site..	○	○	○	○	○
Hosting interns improved our overall organization effectiveness.	○	○	○	○	○

QuestionPro

	Strongly Disagree	Disagree	Neither Agree no Disagree	Agree	Strongly Agree
Interns improved our opioid use disorder (OUD) services or treatment of OUD clients.	○	○	○	○	○
Interns reduced the workload of site staff.	○	○	○	○	○

* You will only see the following question when completing this survey in the portal if you select "MIP" at the top of this survey.

5b. Please indicate your level of agreement with each of the statements below regarding the **impact of the mentored internship program model** on your site, ${UniqueID}.

	Strongly Disagree	Disagree	Neither Agree no Disagree	Agree	Strongly Agree
Our grant-funded site provided sufficient training to interns making them well-prepared to contribute to the behavioral health workforce in California.	○	○	○	○	○
Interns received sufficient supervision and support from their supervisors.	○	○	○	○	○
Interns received sufficient mentorship and support from their mentors.	○	○	○	○	○
Our grant-funded site provided interns access to professional development opportunities.	○	○	○	○	○
Interns had clear roles and responsibilities.	○	○	○	○	○
Interns received regular feedback on their performance.	○	○	○	○	○
Interns had opportunities to engage in meaningful work.	○	○	○	○	○

* You will only see the following question when completing this survey in the portal if you select "MIP" at the top of this survey.

5c. Please indicate your level of agreement with each of the statements below regarding the **impact the of educational partners** on your site, ${UniqueID}.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
This grant strengthened our relationships with educational partner(s).	○	○	○	○	○
Collaboration with educational partner(s) has improved service delivery.	○	○	○	○	○
There were challenges in creating relationships with educational partners.	○	○	○	○	○
There were challenges with recruiting interns.	○	○	○	○	○
We plan on maintaining partnerships with our current educational partner(s).	○	○	○	○	○
We developed sustainable programs with our educational partner(s).	○	○	○	○	○

* 6. Please indicate your level of agreement with each of the statements below regarding the **impact of this grant on service delivery and workforce development** on your site, ${UniqueID}.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Service delivery has become more efficient as a result of this grant.	○	○	○	○	○
We were able to offer more services as a result of this grant.	○	○	○	○	○
This grant allowed our organization to improve or expand opioid use disorder (OUD) services.	○	○	○	○	○
We were able to create new job opportunities due to this grant.	○	○	○	○	○
This grant made it easier to recruit qualified staff.	○	○	○	○	○
The new staff hired during the grant period have integrated well into the organization.	○	○	○	○	○
Staff retention has improved since receiving this grant.	○	○	○	○	○

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
The support provided by the grant was crucial for implementing strategic initiatives related to workforce management.	○	○	○	○	○
Our staff are better equipped to address the unique challenges faced by individuals who receive services through our organization as a result of the trainings provided by this grant.	○	○	○	○	○

* 7. Please indicate your level of agreement with each of the statements below regarding the impact of this grant on DEI+ efforts on your site, ${UniqueID}.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
We were able todevelop specialized programs tailored to the needs of specific populations as a result of this grant.	○	○	○	○	○
We were able to increase accessibility of services to underserved populations through this grant.	○	○	○	○	○
The utilization of services by underserved/underrepresented populations increased.	○	○	○	○	○
We were able to increase diversity among our staff through this grant.	○	○	○	○	○
Trainings received through this grant increased our staff's ability to provide equitable services to underserved populations.	○	○	○	○	○

* 8. This grant enabled your site, ${UniqueID}, to reduce barriers to access for individuals from the following groups: (Select all that apply)

☐ Unhoused

☐ Returning to community from incarceration/justice-involved

☐ Experiencing drug/alcohol challenges and/or in recovery from drug/alcohol problems

☐ Experiencing mental health challenges and/or in recovery from mental illness

☐ Tribal communities

☐ Refugee and/or migrant communities

☐ BIPOC+ communities

☐ LGBTQIA+ communities

☐ Individuals with disabilities

☐ Other

☐ None

* 9. Describe any programs, strategies, and/or efforts your site, ${UniqueID}, implemented through this grant to **increase DEI+ among the following groups**. (Max: 1,200 characters)

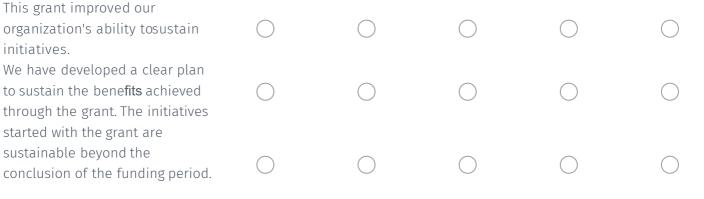Grant-funded site staff

Communities you serve

10. Optional: What did you learn from this grant experience? Are there any significant takeaways that you will apply to future projects?

BHWD Challenges

* 11. Please indicate your level of agreement with each of the statements below regarding the **challenges** your site, ${UniqueID}, faced during the grant period.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Our organization faced significant challenges in effectively utilizing the grant funds.	○	○	○	○	○
Staffing limitations were a major challenge during the implementation of the grant-funded initiatives.	○	○	○	○	○
The administrative requirements for managing the grant were burdensome.	○	○	○	○	○
There were challenges in aligning the grant objectives with our organization's existing structure.	○	○	○	○	○
Limited resources hindered our ability to fully utilize the grant.	○	○	○	○	○
We faced unexpected obstacles that affected the implementation of initiatives.	○	○	○	○	○

* 12. What strategies did your site, ${UniqueID}, implement to address workforce development challenges during the grant period?

☐ Competitive salaries

☐ Professional development opportunities

☐ Improved working conditions

☐ Employee recognition programs

☐ Flexible work schedules

☐ Other

☐ None

* 12a. Rate the overall effectiveness of the strategies deployed in your site, ${UniqueID}, to recruit and retain skilled staff.

	Very Ineffective	Ineffective	Neither Effective nor Ineffective	Effective	Very Effective
Competitive salaries	○	○	○	○	○
Professional development opportunities	○	○	○	○	○
Improved working conditions	○	○	○	○	○
Employee recognition programs	○	○	○	○	○
Flexible work schedules	○	○	○	○	○
${Workforce_Strategies_OTHER}	○	○	○	○	○
None	○	○	○	○	○

13. Optional: Please provide any additional information regarding the challenges your site experienced during this grant period.

BHWD Grant Administration and Feedback

QuestionPro

* 14. Please indicate your level of agreement with each of the statements below regarding **Advocates for Human Potential's (AHP) administration** of this grant.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
The process of obtaining and managing the grant was clear and well supported by AHP.	○	○	○	○	○
The communication and support from AHP met our needs throughout the grant period.	○	○	○	○	○
The trainings provided by AHP enhanced our staff's ability to deliver services that effectively meet the needs of the communities we serve.	○	○	○	○	○

* 15. What additional support or resources would have improved the effectiveness of the grant? (Max: 1200 characters)

* 16. What areas should future grants focus on to improve CA's behavioral health workforce development challenges? (Max: 1200 characters)

17. Optional: Tell us anything else you would like us to know about your experience as a grantee during the following contract periods. (Max: 1200 characters)

Round 1 (If you were a PWI/EPOC/MIP grantee in Round 1):

Round 1 No Cost Extension (If you were a PWI/EPOC/MIP grantee during the NCE of Round 1):

Round 2 (If you were a PWI/EPOC/MIP grantee during Round 2 or a BHRR Phase A/B grantee):

Sustainability and Success

* 18. Please indicate your level of agreement with each of the statements below regarding the **sustainability** of your site, ${UniqueID}, beyond this grant.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
This grant improved our organization's ability to sustain initiatives.	○	○	○	○	○
We have developed a clear plan to sustain the benefits achieved through the grant. The initiatives started with the grant are sustainable beyond the conclusion of the funding period.	○	○	○	○	○
	○	○	○	○	○

QuestionPro

* 19. Please describe your top three successes your site, ${UniqueID}, accomplished during this grant period. (Max: 1200 characters)

Success 1:

Success 2:

Success 3:

20. Optional: Is there anything else you want to share with us regarding your experience as a BHWD grantee?

You will only see the following section when completing this survey in the portal if you select "BHRR" at the top of this survey.

BHRR Needs Assessment Survey
(This is a follow up to the survey you completed at the start of this grant.)

* 1. Does the organization have a vision statement, mission statement, and statement of values?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• Not written • Written, but not clear and specific • Written, but no longer relevant to the organizations current purpose or aspirations • Not considered in decisions on priorities and actions	• Vague and general • Partly relevant to organization's current purpose, or aspirations • Not usually considered in decisions on priorities and actions • Not present in orientation and public communication materials	• Reasonably clear and specific • Relevant to the organization's current purpose or aspirations, but may need some updating. • Usually considered in decisions on priorities and actions • Included in staff orientation and public communication materials	• Clear and specific • Relevant to the organization's current purpose or aspirations • Included in staff orientation and public communication materials

( ) **Low Capacity**   ( ) **Basic Capacity**   ( ) **Moderate Capacity**   ( ) **Strong Capacity**

*2. Does the organization have an organizational chart demonstrating the organizational structure?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• Informal or undocumented • Documented, but not followed • Based on inadequately defined departmental or functional responsibilities and lines of authority	• Documented, but incomplete or out of date • Not usually followed • Based on partially clear roles and responsibilities of departments or functions and lines of authority	• Documented and adequate, but may require some updating • Usually followed • Based on reasonably clear roles and responsibilities of departments or functions and lines of authority	• Documented, good and updated as needed • Consistently followed • Based on well-defined roles and responsibilities of departments or functions and lines of authority

( ) **Low Capacity**   ( ) **Basic Capacity**   ( ) **Moderate Capacity**   ( ) **Strong Capacity**

*3. Does the organization have an external board of directors?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• Not been established or is not functional • Little or no independence from management • No regular meetings • No term limits • No process for electing or appointing and removing members and officers • No written terms of reference or does not understand its functions • No written ethics policy or policy is not enforced • Only an advisory role • Limited effectiveness in setting strategies, oversight of finance and administration, and program	• Members drawn from a narrow group • Limited independence from management • Regular meetings less than twice a year • Meetings that are not well attended • Ineffective or poorly documented meetings • A weak written terms of reference or limited understanding of its functions • Term limits that are not defined or reasonable • No process for electing or appointing and removing members and officer • A written ethics policy that is weak or not well enforced • Limited effectiveness in setting strategies, oversight of finance and administration, and programs	• Members drawn from a reasonably broad spectrum • Moderate independence from management • Regular meetings at least twice a year • Meetings that consistently have a quorum • Reasonably effective and adequately documented meetings • An adequate written terms of reference and understanding of its functions • Reasonable, defined term limits • A process for electing or appointing and removing members and officers • A written ethics policy that is adequate and enforced • Reasonable effectiveness in setting strategies, oversight of finance and administration, and programs	• Members drawn from a broad spectrum • Good independence from management • Regular meetings at least three times a year • Meetings attended by all or nearly all member • Effective and well documented meetings • A good written terms of reference and understanding of its functions • Reasonable, defined term limits • Open and transparent procedures for electing or appointing and removing members and officers • A written ethics policy that is good and well enforced • Good effectiveness in setting strategies, oversight of finance and administration, and programs

QuestionPro

○ **Low Capacity** ○ **Basic Capacity** ○ **Moderate Capacity** ○ **Strong Capacity**

*4. Does the organization have a strategic plan?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• Not written • Written, but dated or inadequate and requires substantial changes • Not based on an analysis of strengths, weaknesses, opportunities, threats, and realistic resource requirements and availability • Does not reflect client priorities • Not clear and specific on priorities and lacks measurable objectives and targets • Not reviewed regularly • Not used for management decisions or operational planning	• Weak and requires significant changes • Does not reflect its current vision, mission, and values • Not based on an adequate analysis of strengths, weaknesses, opportunities, threats, and realistic resource requirements and availability • Does not usually reflect client priorities • Partly clear and specific on priorities with some measurable objectives and targets • Occasionally reviewed • Not usually used for management decisions or operational planning	• Adequate, but may require some updating • A reflection of its current vision, mission, and values • Based on an adequate analysis of strengths, weaknesses, opportunities, threats, and realistic resource requirements and availability • Reflects client priorities • Clear and specific on priorities, measurable objectives, and targets • Periodically reviewed • Usually used for management decisions or operational planning	• Good and regularly updated • A reflection of its current vision, mission, and values • Based on a good analysis of strengths, weaknesses, opportunities, threats, and realistic resource requirements and availability • Reflects client priorities • Reasonably clear and specific on priorities, measurable objectives, and targets • Regularly reviewed • Consistently used for management decisions or operational planning

○ **Low Capacity** ○ **Basic Capacity** ○ **Moderate Capacity** ○ **Strong Capacity**

*5. Does the organization have an annual work plan?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• Have not been prepared • Have been prepared, but are inadequate • Not timely • Not linked to a program or project budgets • Lacking clear and measurable goals, activities, timelines, responsibilities, performance indicators, or targets • Not prepared with significant staff participation • Not used for management decisions, operational planning, and monitoring progress • Not modified as needed	• Weak, incomplete, or require substantial external assistance • Not usually timely • Not well linked to program or project budgets • Needing significant revisions in goals, activities, timelines, responsibilities, or performance indicators and targets • Not prepared with broad staff participation • Not usually used for management decisions, operational planning, or monitoring progress • Modified without required donor approvals	• Adequate without external assistance, but may need minor improvements • Usually timely • Linked to program or project budgets • Containing adequate goals, activities, timelines, responsibilities, or performance indicators and targets • Prepared with significant staff participation • Usually used for management decisions, operational planning, or monitoring progress • Modified with required donor approvals	• Good without external assistance • Consistently timely • Integrated with program or project budgets • Containing good goals, activities, timelines, responsibilities, or performance indicators and targets • Prepared with broad staff participation • Consistently used for management decisions, operational planning, or monitoring progress • Modified with required donor approvals

○ **Low Capacity** ○ **Basic Capacity** ○ **Moderate Capacity** ○ **Strong Capacity**

*6. Does the organization have a business plan that addresses sustainability?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• No written fundraising and new business development plan • A written fundraising and business development plan that is not implemented • Had frequent cash flow problems or negative net income last year • Only one major funding source • Insufficient funds for existing programs next year • No regular funding from cost recovery, sales, or membership fees • Little absorptive capacity for additional projects • Insufficient unrestricted income and case reserves to cover 2 months of operating costs without new donor funding • No access to new loans or line of credit	• A weak fundraising and new business development plan • A weak implementation of the fundraising and new business development plan • Had occasional cash flow problems, but positive net income last year • Only one major funding source • Insignificant funding from cost recovery, sales, or membership fees • Limited absorptive capacity for additional projects • Unrestricted income and case reserves to cover 2-3 months of operating costs without new donor funding • No existing line of credit or limited access to new loans	• An adequate fundraising and new business development plan • Satisfactory implementation of the fundraising and new business development plan • Had no significant cash flow problems and positive net income over the last year • At least two major funding sources • Limited funding from cost recovery, sales, or membership fees • Adequate absorptive capacity for additional projects • Unrestricted income and case reserves to cover 3-6 months of operating costs without new donor funding • Access to new loans, but no existing line of credit	• A good fundraising and new business development plan that is regularly updated and well implemented • Had no significant cash flow problems and positive net income over the last 2 years • At least three major funding sources • Significant funding from cost recovery, sales, or membership fees • Good absorptive capacity for additional projects • Unrestricted income and case reserves to cover 6 months of operating costs without new donor funding • Good access to new loans or an existing line of credit

◯ **Low Capacity**   ◯ **Basic Capacity**   ◯ **Moderate Capacity**   ◯ **Strong Capacity**

* 7. Does the organization have policies and procedures on job descriptions?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• are inadequate and require substantial changes • they are not followed • not supported by adequate records in secure central files; • not comprehensive addressing position titles, roles and responsibilities, required qualifications and skills, reporting, delegations of authority, and re-assignments	• written, but weak and require significant changes; • adequate, but not usually followed. • may be hindered by weak records or lack of secure central files; • partly comprehensive addressing position titles, roles and responsibilities, required qualifications and skills, reporting, delegations of authority, and re-assignments	• written and adequate, but may require minor changes or some updating. • generally followed • supported by adequate records in secure central files; • adequately comprehensive addressing position titles, roles and responsibilities, required qualifications and skills, reporting, delegations of authority, and re-assignments	• written and good and regularly revised as needed • do not require changes • consistently followed; • supported by good records in secure central files • fully comprehensive addressing position titles, roles and responsibilities, required qualifications and skills, reporting, delegations of authority, and re-assignments

◯ **Low Capacity**   ◯ **Basic Capacity**   ◯ **Moderate Capacity**   ◯ **Strong Capacity**

* 8. Does the organization have policies and procedures on a staffing plan?

P QuestionPro

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• No written staffing plan or it is not followed • Many key management, technical, or finance positions have not been established, remain vacant, or are filled by people without appropriate skills • Some vacancies have significantly reduced efficiency or effectiveness for more than 6 months • Many staff need to substantially improve their capacity to do their jobs well • There is little diversity in the gender, ethnic, religious, and cultural composition of management and staff • The organization has made little or no active efforts to diversify the management and staff	• A written staffing plan that is weak or not usually followed • Some key management, technical, or finance positions have not yet been established, remain vacant, or are filled by people without the appropriate qualifications or skills • Some vacancies have significantly reduced efficiency or effectiveness for 3-6 months • Many staff need to significantly improve their capacity to do their current jobs well • There is some diversity in the gender, ethnic, religious, and cultural composition of management and staff, but some groups are significantly under-represented • The organization has made some efforts to diversify management and staff that have not been very successful	• A written staffing plan that is generally adequate and is usually followed with appropriate flexibility • Most key management, technical, and finance positions are filled by people with appropriate qualifications and skills • Some vacancies have reduced efficiency or effectiveness for no more than 3 months • Some staff need to improve their capacity to do their current jobs well • There is significant diversity in the gender, ethnic, religious, and cultural composition of management and staff, but some groups remain under-represented • The organization has made some active efforts to diversify management and staff that have been partially successful	• A written staffing plan that is good and consistently followed with appropriate flexibility • All key management, technical, and finance positions are filled by people with appropriate qualifications and skills • Vacancies have not reduced efficiency or effectiveness • Some staff need to improve their capacity to take on new tasks or adjust to new systems and requirements • There is good diversity in the gender, ethnic, religious, and cultural composition of management and staff • The organization has made some active efforts to diversify management and staff that have been successful

○ Low Capacity   ○ Basic Capacity   ○ Moderate Capacity   ○ Strong Capacity

* 9. Does the organization have policies and procedures on recruitment and retention of staff?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• Not written • Inadequate or not followed • No supported by adequate records • Recruitment and hiring are prone to favoritism or bias • References and salary history are not verified • It is difficult to recruit most positions • Staff attrition rates are high for the organization's size, type and location • Salaries and advancement potential are very low • Most staff are dissatisfied with the organization or their positions • Staff professional development needs are not identified • Rarely provide training and other staff development opportunities for staff	• Written but weak or incomplete • adequate, but not usually followed. • Hindered by weak records • Recruitment and hiring are not open and transparent • References and salary history are not usually verified • It is difficult to recruit many positions • Staff attrition is above normal for the organization's size, type and location • Staff have few opportunities for career advancement and salary increases • Most staff are partially satisfied with the organization and their positions • Staff professional development needs are not adequately identified • Occasionally provide training and other staff development opportunities for staff, but the amount or quality may be weak	• Adequate, but may require some updating • Usually followed. • Supported by adequate records • Recruitment, hiring, and retention are usually open and transparent • References and salary history are usually verified • It is difficult to recruit some positions • Staff attrition is typical for the organization's size, type, and location • Staff have some opportunities for career advancement and salary increases • Most staff are satisfied with the organization and their positions • Staff professional development needs are periodically identified, but less than once a year • Regularly provide training and other staff development opportunities for staff, but more is needed	• Good and regularly revised as needed • Consistently followed • Supported by good records • Recruitment, hiring, and retention are consistently open and transparent • References and salary history are consistently verified • It is not difficult to recruit a few key positions • Staff attrition is relatively low for the organization's size, type, and location • Staff have significant opportunities for career advancement and salary increases • Most staff have high satisfaction with the organization and their positions • Staff professional development needs are routinely identified at least once a year • Regularly provide an appropriate amount and quality of training and other staff development opportunities for staff

○ Low Capacity   ○ Basic Capacity   ○ Moderate Capacity   ○ Strong Capacity

P QuestionPro

* 10. Does the organization have policies and procedures regarding salary and benefits?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• Lacks standard pay ranges or a pay classification system • Does not regularly adjust pay scales for inflation • Does not document employee benefits in a policy manual or handbook given to all employees • Does not make payments for government benefit programs or only made for a subset of eligible employees • Does not pay overtime or compensatory leave as required by law	• Has standard pay ranges or a pay classification system, but they are not usually applied • Does not regularly adjust pay scales for inflation • Does not document employee benefits in a policy manual or handbook given to all employees • Does not make payments for government benefit programs or only made for a subset of eligible employees • Does not control overtime through advance approvals	• Has standard pay ranges or a pay classification system • Periodically adjusts the pay ranges or classification. • Documents employee benefits in a policy manual or handbook given to all employees • Makes payments for government benefit programs for all eligible employees • Usually controls overtime by advance approvals	• Has standard pay ranges or a pay classification system • Regularly adjusts pay scales for inflation • Documents employee benefits in a policy manual or handbook given to all employees • Make payments for governments benefit programs for all eligible employees • Consistently controls overtime through advance approvals.

○ **Low Capacity**   ○ **Basic Capacity**   ○ **Moderate Capacity**   ○ **Strong Capacity**

* 11. Does the organization provide support to employees through supervision?

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• Not defined and documented supervisory assignments • No written policies and procedures for staff and contractor supervision • Written policies and procedures that are not usually followed • Many supervisors with inadequate skills and training • Employees and contractors do not have written workplans or performance objectives • Staff and consultants lack clear and detailed guidance or scopes of work for specific assignments	• Defined and documented some supervisory assignments, but they may be incomplete, unclear, or out of date • Weak written policies and procedures for staff and contractor supervision • Supervision policies and procedures that are usually not followed • Some supervisors with weak skills and training • Employees and contractors do not usually have written workplans or performance objectives prepared at least once a year or they are not timely • Staff and consultants do not usually have clear and detailed guidance or scopes of work for specific assignments	• Defined and documented some supervisory assignments, but some may need updating • Adequate written policies or procedures for staff and contractor supervision • Supervision policies and procedures that are usually followed • Supervisors with adequate skills and training • Most employees have written workplans or performance objectives prepared at least once a year on a timely basis • Staff and consultants usually have a clear and detailed guidance or scopes of work for specific assignments	• Defined and documented supervisory assignments and revised them as needed • Good written policies or procedures for staff and contractor supervision • Supervision policies and procedures that are consistently followed • Supervisors with good skills and training • Employees consistently have written workplace or objectives prepared at least once a year on a timely basis • Staff and consultants consistently have clear and detailed guidance or scopes of work for specific assignments

○ **Low Capacity**   ○ **Basic Capacity**   ○ **Moderate Capacity**   ○ **Strong Capacity**

* 12. Does the organization have structures in place to assess the diversity of their staff?

P QuestionPro

Low Capacity 1	Basic Capacity 2	Moderate Capacity 3	Strong Capacity 4
• Policies, procedures, and systems for addressing culture and gender issues are: Not written or written, but inadequate and require substantial changes • Inadequate tools and expertise for systematically assessing culture and gender issues • Not given staff adequate training on culture and gender issues and tools • Not adequately addressed culture and gender issues in project planning, implementation, monitoring, and evaluation • Frequently experienced major problems in programs due to inadequate consideration of culture or gender issues	• Policies, procedures, and systems for addressing culture and gender issues are: Weak and require significant changes • Weak tools and expertise for systematically assessing culture and gender issues • Not usually given staff sufficient training on culture and gender issues and tools • Not usually adequately addressed culture and gender issues in project planning, implementation, monitoring, and evaluation • Often experienced major problems in programs due to inadequate consideration of culture or gender issues	• Policies, procedures, and systems for addressing culture and gender issues are: Adequate, but may require some updating • Adequate tools and expertise for systematically assessing culture and gender issues • Usually given staff sufficient training on culture and gender issues and tools • Consistently adequately addressed culture and gender issues in project planning, implementation, monitoring, and evaluation • Occasionally experienced major problems in programs due to inadequate consideration of culture or gender issues	• Policies, procedures, and systems for addressing culture and gender issues are: Good consistently applied • Good tools and expertise for systematically assessing culture and gender issues • Consistently given staff sufficient training on culture and gender issues and tools • Usually adequately addressed culture and gender issues in project planning, implementation, monitoring, and evaluation • Rarely experienced major problems in programs due to inadequate consideration of culture or gender issues

◯ **Low Capacity** ◯ **Basic Capacity** ◯ **Moderate Capacity** ◯ **Strong Capacity**

* 13. Please enter the salaries (in US dollars) of Direct Practice Staff and Supervisors. (therapists, outreach workers, health educators, navigators, case managers etc.) If you are not employing someone at the level indicated, please enter "-999".

	Under 2 years of experience	3-5 years of experience	5+ years of experience	5-10 years of experience
Peer (regardless of education level)				
NoDegree				
HS Diploma				
AA (no SUD credentials or certifications)				
AA with SUD certifications/credentials BA/BS (no SUD credentials or certifications)				
BA/BS with SUD credentials or certifications				
MA/MSW/MFT/MS (unlicensed)				

	Under 2 years of experience	3-5 years of experience	5+ years of experience	5-10 years of experience
LCSW/LMFT/LPCC/ Master's level licensed clinicians and/or credentialed				
PhD, PsyD, DSW, Doctorate level unlicensed				
PhD, PsyD, DSW, Doctorate level licensed clinician				
Psychiatric mental health nurse practitioner (PMHNP) and Psychiatrist				
Licensed Clinical Supervisors (any degree)				

* I have reviewed my responses and understand that submissions will not be accepted until **January 1, 2025**.

○ Yes, I agree

QuestionPro