



Behavioral Health Programs (BHP) -
Peer Personnel
Training and Placement Program

Grant Guide
For Fiscal Year 2024-25

If your program requires approval to contract from a coordinating authority, please inform the authority of the terms and conditions contained in the sample grant agreement. Applicants must agree to the terms and conditions prior to receiving funds. The Department of Health Care Access and Information will not make changes to the terms and conditions specified in this Grant Guide.

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A. Background and Mission

In November 2004, California voters approved Proposition 63, the Mental Health Services Act (MHSA). Sections 2 and 3 of the MHSA provide increased funding, personnel, and other resources to support public mental health programs and monitor progress toward statewide goals for children, transition age youth, adults, older adults, and families.

The California Department of Health Care Access and Information (HCAI) administers the Behavioral Health Programs (BHP), a component of the MHSA. State budget appropriations fund the BHP program, which promotes the expansion of postsecondary education and training to meet mental health occupational shortage needs.

This grant opportunity will result in agreement(s) with public, private, and nonprofit organizations, including faith based and community-based organizations (CBOs), for training and support that facilitates the training and placement of peer personnel. This Grant Guide defines peer personnel as individuals with lived experience as a mental/behavioral health services consumer, family member, and/or caregiver placed in designated peer positions.

The applicant must provide training to peer personnel that meets the 80-hour training requirements under the California Department of Health Care Services (DHCS) Medi-Cal Peer Support Specialist Certification Program.

Applicants must implement a peer personnel training and placement program that contains all of the following components:

- 1. Recruitment and Outreach:** Engage in activities to recruit individuals who are either currently employed or volunteering, or who are seeking employment or to volunteer, as peer personnel to participate in Grantee's training and placement program. Recruitment activities shall target individuals with lived experience who can address the cultural and language needs of the diverse community the Grantee will serve. Recruitment efforts may target individuals with lived experience in high schools, adult education programs, regional occupation programs, community colleges, and those already working and/or volunteering in a behavioral health program. Outreach tools may include, but are not limited to, presentations, personal outreach, information sharing sessions, and social media, such as Facebook and Twitter.
- 2. Career Counseling:** Assist recruited participants in developing individualized career plans that identify courses for peer personnel to take by position type or category. Participants can include short-term and long-term goals for entering, re-entering, or advancing in the behavioral health workforce. The Grantee shall also assist participants by providing information on educational courses or training to advance career plans and information about financial and training resources beyond those offered by the Grantee.

- 3. Training:** Provide training to facilitate the deployment of peer personnel as an effective and necessary service to clients, family members, and caregivers. Grantees must assess the eligibility of participants to meet the grandparenting provisions of the DHCS Medi-Cal Peer Support Specialist Certification Program and/or provide the 80-hour mandatory training requirements. The Grantee must be a DHCS recognized training provider or contract with a DHCS recognized training provider that meets the Med-Cal Peer Support Specialist Certification training requirements.

The applicant will describe additional training that they will provide to address the needs of child and youth consumers (0 - 25 years of age).

For more information regarding the DHCS Peer Specialist Certification Program, see <https://www.dhcs.ca.gov/services/Pages/Peer-Support-Services.aspx>

Applicants may also add other topics, if desired, that support the program goals.

- 4. Placement:** This is a key focus of the Peer Personnel program. The program must assist program participants in finding placement as peer personnel providing an effective and necessary service to clients, family members, and caregivers. For the purposes of this grant, placement means assignment in a peer personnel position as a paid employee or unpaid volunteer. The employer is responsible for identifying and funding vacant peer personnel positions. Applicants must ensure that successful completion of the training program will enable entry into peer personnel positions, as well as encourage career progression.

HCAI will disburse full funding for the placement category when the Grantee successfully places at least 80 percent of participants in a position by the end of the contract term and provides acceptable justification as to why they were not able to place the remainder. HCAI will only pay for students' completion of the training program. HCAI will not make payment for a student that drops out unless the contractor adds another student. The applicant shall decide if they add another student or not.

- 5. Support:** Provide support to participants for six months after placement by engaging in activities that may include mentorship, self-help and support groups, and other support activities. The program participants can complete their six months in a different position from the first placement as long as they remain in a peer personnel position. If program participants are unsuccessful in gaining and/or retaining placement after six months of training, the Grantee shall explain in progress reports as to why program participants were unable to gain or retain placement a peer personnel position, and how they could address this in the future.
- 6. Evaluation:** Evaluate the peer personnel training and placement program when program activities conclude. The evaluation must include all of the following components:

- a. Summary of all program activities and outcomes using the Peer Personnel Training and Placement Quarterly Certification Statement and Progress Report.
 - b. Comprehensive survey of program participants and their employers.
 - c. Percentage of program participants that are successfully placed.
 - d. Highlights of any major successes and/or challenges in completing all program activities.
7. **Financial Assistance (if applicable):** Provide financial assistance for program participants to attend training. The program shall provide financial assistance to enable participation in the activities sponsored by the proposing organization and Peer Support Specialist Certification 80-hour training, certification, and examination costs. Costs may include transportation, uncompensated time-off, and childcare.
8. **Program Responsibilities:** While providing services to recruit, train, place, support, and retain peer personnel who are currently employed or volunteering, or who are seeking employment or to volunteer as a peer personnel support specialist, the Grantee shall:
- a. Include individuals with lived experience, including consumers, family members, and/or caregivers, in the design and performance of program activities.
 - b. Ensure continued engagement and coordination with county(ies), CBOs, and educational institutions and/or training entities listed as partners in the application. HCAI does not require a minimum or maximum number of partners.
 - c. Ensure county(ies), CBOs, consumers, family members, and caretakers participate in developing peer personnel position types, and the training required for each type.
 - d. Ensure focus on innovative, evidence-based, emerging, and/or community-identified strategies to achieve the goal of training and placing peer personnel.
 - e. Ensure all program activities are consistent with the following MHSA values and priorities:
 - I. Community collaboration
 - II. Cultural competence
 - III. Client/family-driven mental health system
 - IV. A wellness, recovery, and resilience focus
 - V. An integrated service experience for consumers and their families to address the changing needs of the peer personnel workforce

B. Eligible Applicants and Available Funding

1. Eligible Applicants

Applicants must be a DHCS recognized training provider that can meet the 80-hour Medi-Cal Peer Support Specialist Certification training requirements, or must be contracted with a DHCS recognized training provider that can meet the 80-hour Medi-Cal Peer Support Specialist Certification Training requirements.

HCAI invites applications from the following organizations:

- a. County
- b. CBO
- c. Educational institution
- d. Training organization
- e. A group of organizations listed above (with one organization identified as the fiscal sponsor)

All applicants must be able to:

- a. Identify peer personnel needs.
- b. Identify partner educational institution(s) and/or training organization(s).
- c. Provide training that prepares peer personnel to qualify for and obtain placement.
- d. Provide support that will ensure peer personnel retain placement.
- e. Demonstrate experience in training and supporting individuals with lived experience as consumers, family members, and caregivers.

Educational institution or training organization applicants must also be able to:

- a. Provide the required training for peer personnel.
- b. Partner with identified county(ies) and/or CBO(s) to place peer personnel.

Current Grantees are eligible to apply but may not co-mingle previously awarded funds with any award resulting from this Grant Guide.

2. Available Funding

- a. This is a one-time grant opportunity with no implied or expressed guarantee of subsequent funding after the initial contract award resulting from this application. In the event there is additional state funding available, HCAI has the discretion to make additional awards.
- b. Approximately \$8,500,000.00 in state funding is available to support Peer Personnel Training and Placement programs. Of the \$8,500,000.00 \$6,500,000.00 is available to focus on training peer personnel that serve child, youth, or families. If the Budget Act reduces or deletes funding for any fiscal year (FY) for purposes of this program,

HCAI shall have the option to either cancel a grant agreement with no liability occurring to HCAI or offer an agreement amendment to the Grantee to reflect the reduced amount.

- c. HCAI may award full, partial, or no funding to an applicant based on the applicant's success in meeting the selection criteria score and the amount of available funds.
- d. A Peer Personnel Training and Placement Program may be eligible to receive a maximum of \$5,000 per participant for successful placement, up to the maximum award amount of \$1,000,000 per program. This creates a new minimum threshold, affording a program the full award when they meet the minimum threshold of placing 200 participants.

C. Initiating an Application

1. Applicants should provide concise descriptions of their ability to satisfy the Grant Guide requirements. Applicants must submit applications that are complete and accurate. HCAI may reject an application that contains omissions, inaccuracies, or misstatements.
2. Applicants must register and submit all applications through the web-based eApp, <https://funding.hcai.ca.gov/>
3. You must register as a new user or enter an existing username and password. The eApp Technical Assistance Guide contains eApp information, including how to register and complete your application.
4. Applicants must complete grant applications no later than March 1, 2024. HCAI will not consider applications received after this date.
5. Applicants must provide the actual legal name when submitting an application under a fictitious business name or title.
6. Applicants must include the performance of all services described in their applications. HCAI may reject applications that contain any deviation from the work specifications.
7. HCAI may reject an application if it is conditional or incomplete, or if the application contains any alterations of form or other irregularities of any kind. HCAI may reject any or all applications and may waive an immaterial deviation in an application. HCAI's waiver of an immaterial deviation shall in no way modify the Grant Guide or excuse the applicant from full compliance with all requirements if awarded the agreement.
8. HCAI may reject an application if the applicant failed to meet deliverables from a previously awarded HCAI grant.
9. Applicants are entirely responsible for costs incurred in developing applications in anticipation of award of the agreement and shall not charge the State of California for these costs.
10. HCAI may modify this Grant Guide prior to the application submission deadline by

issuing an addendum at <https://hcai.ca.gov/loans-scholarships-grants/grants/bhp/>

11. HCAI reserves the right to reject all applications.
12. Where applicable, the applicant should carefully examine work sites and specifications. Applicants shall not make additions or increases to the agreement amount due to a lack of careful examination of work sites and specifications.
13. HCAI will not accept alternate grant agreement language from a prospective Grantee. HCAI will consider an application with such language to be a counteroffer and will reject it. HCAI will not negotiate the terms and conditions outlined in Attachment 2: Sample Grant Agreement.
14. If your program requires approval to contract from a coordinating authority, please inform the authority of the terms and conditions contained in the Sample Grant Agreement. HCAI considers the submission of an application as an express acceptance of the terms. All applicants must agree to the terms and conditions prior to receiving funds. HCAI will not make changes to the terms and conditions specified in this Sample Grant Agreement.

Awardees must sign and submit grant agreements by the HCAI due date. If the Awardee fails to sign and return the grant agreement by the due date, it will result in loss of award
15. When the Grantee is a county, city, school district, or other local public body, the Grantee must include a copy of the resolution, order, motion, ordinance, or other similar document from the local governing body authorizing execution of the grant agreement with the signed grant agreement.
16. If, upon reviewing the Final Progress Report, HCAI finds that the Grantee has not met all requirements and/or expended all funds, HCAI will request the remittance of funds from the Grantee.
17. The Public Records Act shall apply to all grant deliverables, including applications, reports, and supporting documentation.
18. HCAI shall not consider any oral understanding or agreement to be binding on either party.

D. Budget Detail

If awarded, Grantee shall be contractually bound to the rates and budget line items outlined in this section and must use them to invoice HCAI for services provided under this grant agreement.

If awarded, HCAI will prorate payments based on the total number of participants who complete activities under each budget category.

The budget categories are:

1. Direct Program Costs

a. Recruitment and Outreach Costs

- Costs directly attributed to the completion of recruitment and outreach services. Costs can include program staff salaries, materials and supplies required for program activities, program consultants and/or contractors, and travel.
- Costs may not exceed five percent of total proposed budget.

b. Career Counseling Costs

- Costs directly attributed to the completion of career counseling services. Costs can include program staff salaries, materials and supplies required for program activities, program consultants and/or contractors, and travel.
- Costs may not exceed 20 percent of total proposed budget.

c. Training Costs

- Costs directly attributed to the completion of training services. Costs can include program staff salaries, materials and supplies required for program activities, program consultants and/or contractors, and travel.
- Costs may not exceed 40 percent of total proposed budget.

d. Financial Assistance Costs

- Grantee shall only provide financial assistance for program participants to attend training and shall not include tuition or admission fees. Grantee shall only provide financial assistance to enable participation in the activities that the proposing organization sponsors.
- Costs may include transportation costs, uncompensated time-off, and childcare.
- Costs may not exceed 10 percent of total proposed budget.

e. Placement Costs

- Placement must be at least 35 percent of total proposed budget.
- Grantee will only receive full funding for this category if they place at least 80 percent of individual participants in a peer personnel position by the end of the contract term. Grantee must provide justification as to why the remaining participants were not able to find placement. HCAI must approve the justification before it can make any payments.

f. Support Costs

- Costs directly attributed to the completion of post training/placement support services. Costs can include program staff salaries, materials and supplies required for program activities, program consultants and/or contractors, and travel.
- Costs may not exceed 20 percent of the total proposed budget.
- For those participants that have not gained or retained placement after six months following completion of training, HCAI will provide payment based on completion of revised individual career plans to address shortcomings in the design or execution of prior individual career plans.

g. Evaluation Costs

- Costs to evaluate the peer personnel training and placement program when program activities conclude.
- Costs may not exceed five percent of total proposed budget.

2. Indirect Program Costs

- Costs indirectly attributed to the completion of services which can include utilities, rent, and administrative service and payroll staff.
- Costs may not exceed 10 percent of total direct costs.

This is a performance-based contract. If awarded, HCAI will reimburse the Grantee based on completion of services per budget line item as identified in each respective budget line-item section. HCAI will not pay any startup costs.

E. Budget Restrictions

HCAI will not award any applicant more than \$1,000,000.00.

An applicant may request the distribution of grant funding for each FY of the grant agreement. Please review the budget category limitations in **Budget Detail** section.

The total number of grant awards can vary depending on the amount requested per application, award amounts approved, and available grant funding.

F. Evaluation and Scoring Procedures

HCAI may award multiple grants, and final award(s) will include consideration of the following elements:

1. HCAI may reject applications that contain false or misleading statements, or that provide references which do not support an attribute or condition claimed by the applicant.

HCAI will use the criteria in Attachment 1: Evaluation and Scoring Criteria to score applications and will grant awards to the highest scored applications. HCAI also intends for the Peer Personnel program to support a geographic distribution in California. Applicants seeking to support geographic regions not addressed by other scored applications may receive preference.

G. Grant Agreement Deliverables

1. The Grantee shall complete quarterly certifications using the Peer Personnel Training and Placement Quarterly Certifications found within the <https://funding.hcai.ca.gov/> portal. The Grantee shall submit quarterly certifications in accordance with the following schedule:

	FY 2024-25	FY 2025-26
Quarter 1 Certification	August-September, due by October 31	July-September, due by October 31
Quarter 2 Certification	October-December, due by January 31	October-December, due by January 31
Quarter 3 Certification	January-March, due by April 28	January-March, due by April 28
Quarter 4 Certification	April-June, due by July 31	April-June, due by July 31

2. The Grantee shall administer the Participant Demographic Information Survey to individuals receiving/participating in the activities, using the Participant Demographic Information Survey located in Attachment 3. The Grantee shall report results in quarterly Certification reports.

H. Post Award and Payment Provisions

1. HCAI expects the Grantee will begin performance of the grant agreement on **June 30, 2024**. Grantee shall not begin any work until they sign the grant agreement and HCAI returns the fully executed agreement.
2. Should the Grantee fail to commence work at the agreed upon time, HCAI, upon five days written notice to the Grantee, reserves the right to terminate the grant agreement.
3. Grantee shall complete all Scope of Work activities under the grant agreement on or before the termination date of the grant agreement.
4. HCAI will evaluate if the Grantee meets its deliverables.
5. HCAI reserves the right to cancel the grant agreement should the deliverables not meet HCAI's expectations.

6. HCAI makes payments upon approval of quarterly certification statements documenting the completion of activities.

I. Grantee Organizations and the Media

As a state department, HCAI is responsible for what it releases to the public and is required to provide information to anyone who requests it under the California Public Records Act. HCAI's Director's Office reviews all information for accuracy, risk, relevancy, and other factors. The office also coordinates timing for all HCAI news and press engagements in conjunction with other news coming out from the California Health and Human Services Agency (CalHHS) and the Governor's Office. Grantee organizations need to take this into consideration when preparing media statements or press releases about its programs. If an entity is engaging with the media to promote its grant award and/or program activities, there are important steps to follow:

- All grantee organizations **are required** to submit press releases for review by HCAI at a minimum of **two weeks in advance** of the intended publication date for review and approval.
- Grantee organizations understand that portions, or the entirety, of its press release may be used by HCAI, CalHHS or the Governor's office and **may be changed without notice to the grantee**.
- If HCAI, CalHHS or the Governor's Office issues a press release or statement about an award the grantee received, but does not use the awarded organization's press announcement, the awardee may issue its release **after** HCAI, CalHHS or the Governor's Office issues a statement. **The release must still be reviewed by HCAI before release.**
- For some grants or programs, a pre-approved press release template may be developed in a tool kit for the program, which may reduce the review/approval time by HCAI. (This does not apply to all grants.)

Grantee organizations should stay in close contact with grant managers and provide any detailed plans related to news media engagement.

J. Grant Questions and Answers

You can find answers to most questions in this Grant Guide. If you have any questions relating to the intent or interpretation of grant language, email BHP staff at BHPPrograms@HCAI.ca.gov.

HCAI will post notice of awards at <https://hcai.ca.gov/loans-scholarships-grants/grants/BHP/> by April 28, 2024. Applicants can also find past awardee information on this site.

K. Key Dates

The key dates for the program year are as follows:

Event	Date	Time
Application Opens	January 10, 2024	3:00 p.m.
Application Closes	March 1, 2024	3:00 p.m.
Award Notice	April 28, 2024	3:00 p.m.
Grant Terms	June 30, 2024 – June 30, 2026	N/A

L. Department Contact

For questions related to BHP and the Peer Personnel Training and Development application, email HCAI at BHPprograms@HCAI.ca.gov.

Thank you!

We would like to thank you for your interest in applying for the BHP Peer Personnel Training and Placement Program, and for your continued efforts to provide training and support that facilitates the deployment of peer personnel as an effective and necessary service to clients and family members.

Attachment 1: Evaluation and Scoring Criteria

HCAI will award the highest scored applications and intends for this Grant Guide to support multiple counties in California by providing a distribution of awards throughout the state. Applicants seeking to support geographic regions not addressed by other scored applications may receive preference. HCAI will score applications using the following criteria:

Section	Evaluation and Scoring Criteria	Max Points Available
<p>Program Description: Lived Experience</p>	<p>Does the applicant identify individuals with lived experience that the proposed program included in the design and performance of program activities?</p> <p>0 points: The applicant does not identify individuals with lived experience included in the design and performance of program activities. 5 points: The applicant identifies at least one category of individuals with lived experience included in the design and performance of program activities. 10 points: The applicant identifies two or more categories of individuals with lived experience included in the design and performance of program activities.</p>	<p>10</p>
<p>Program Description: Peer Personnel Needs</p>	<p>Peer Personnel Needs of Children and Youth: Does the applicant identify how the Peer Personnel needs of the children and youth aged 0-25 will be addressed by the proposed program?</p> <p>0 points: The applicant does not identify how the needs of children and youth 0-25 years of age will be addressed by the proposed program. 5 points: The applicant identifies at least 1-2 methods on how the needs of children and youth 0-25 years of age will be addressed by the proposed program. 10 points: The applicant identifies at least 3-4 methods on how the needs of children and youth 0-25 years of age will be addressed by the proposed program.</p>	<p>10</p>

Section	Evaluation and Scoring Criteria	Max Points Available
Target Population: Number Served and Demographic of Population	<p>Does the applicant target underserved groups for outreach and recruitment?</p> <p>0 points: The applicant does not support individuals from underserved populations. 5 points: The applicant supports individuals from 1-5 groups from underserved populations. 10 points: The applicant supports individuals from 6 or more groups from underserved populations.</p>	<p>10</p>
Target Population: Number Served and Demographic of Population	<p>Does your organization target underserved, unserved and/or inappropriately served racial and ethnic communities?</p> <p>0 points: The applicant does not propose to serve the underserved, unserved and/or inappropriately served racial and ethnic communities. 5 points: The applicant proposes to serve the underserved, unserved and/or inappropriately served racial and ethnic communities.</p>	<p>5</p>
Program Components: Recruitment and Outreach - Cultural and/or Language Competence	<p>How will the applicant recruit individuals who are either currently employed or volunteering, or who are seeking employment or to volunteer as peer personnel and targets individuals with lived experience who can address the cultural and language needs of the diverse community the Grantee will serve?</p> <p>0 points: The applicant does not identify how they propose to address the cultural and/or language needs of the diverse community the Grantee will serve. 5 points: The applicant identifies at least 1-4 methods on how they propose to address the cultural and/or language needs of the diverse community the Grantee will serve. 10 points: The applicant identifies at least 5 methods on how they propose to address the cultural and/or language needs of the diverse community the Grantee will serve.</p>	<p>10</p>

Section	Evaluation and Scoring Criteria	Max Points Available
Program Components: Career Counseling	<p>Does the applicant assist participants in developing individualized career plans and help identify courses to take for peer personnel position type or category?</p> <p>0 points: The applicant does not identify career counseling activities that assist participants in developing individualized career plans. 5 points: The applicant identifies 1-5 Career Counseling activities that assist participants in developing individualized career plans. 10 points: The applicant identifies 6 or more Career Counseling activities that assist participants in developing individualized career plans.</p>	<p>10</p>
Program Components: Training Curriculum	<p>Does your program provide additional peer training that specifically addresses the needs of consumers 0 to 25 years of age and their families?</p> <p>0 points: The program does not provide additional peer training that specifically addresses the needs of consumers ages 25 and under. 5 points: The program does provide additional peer training that specifically addresses the needs of consumers ages 25 and under.</p>	<p>5</p>
Program Components: Placement	<p>Does the applicant identify how they will assist program participants in finding placement in peer personnel positions that require the skills provided by the Grantee’s peer personnel training program?</p> <p>0 points: The applicant does not identify the placement activities, which are a priority focus of this program. 5 points: The applicant identify 1 - 4 placement activities, which are a priority focus of this program. 10 points: The applicant identify 5 or more placement activities, which are a priority focus of this program.</p>	<p>10</p>

Section	Evaluation and Scoring Criteria	Max Points Available
Program Components: Support	<p>Does the applicant identify the support activities they will engage in to support all participants, including those who are unsuccessful in gaining and/or retaining placement, for six months after placement? Activities may include mentorship, self-help and support groups, retraining, and other support activities</p> <p>0 points: The applicant does not identify the support activities they will engage in to support all participants, including those who are unsuccessful in gaining and/or retaining placement, for six months after placement.</p> <p>5 points: The applicant identifies 1 - 6 support activities they will engage in to support all participants, including those who are unsuccessful in gaining and/or retaining placement, for six months after placement.</p> <p>10 points: The applicant identify 7 or more support activities they will engage in to support all participants, including those who are unsuccessful in gaining and/or retaining placement, for six months after placement.</p>	10
Work Plan and Schedule	<p>Does the applicant provide a Work Plan and Schedule that addresses all the required program components described in Section A. Background and Mission of the Grant Guide?</p> <p>0 Points: The applicant does not provide a Work Plan and Schedule that addresses all the required program components.</p> <p>5 Points: The applicant provides a Work Plan and Schedule that addresses all the required program components.</p>	5
Project Personnel	<p>Does the applicant’s project personnel include individuals with lived experience as a consumer, family member, and/or caregiver?</p> <p>0 points: No 5 points: Yes</p>	5

Section	Evaluation and Scoring Criteria	Max Points Available																		
Budget Detail	<p>HCAI will score the cost effectiveness to effectively and successfully implement and administer the Peer Personnel program.</p> <p>HCAI will score the Budget Rate based on the following criteria:</p> <table border="1" data-bbox="522 554 1169 751"> <thead> <tr> <th>Rate Per Person Placed</th> <th>Total Points</th> </tr> </thead> <tbody> <tr> <td>\$4,500 or less</td> <td>10 Points</td> </tr> <tr> <td>\$4,501 - \$4,999</td> <td>5 Points</td> </tr> <tr> <td>\$5,000 and over</td> <td>0 Points</td> </tr> </tbody> </table> <table border="1" data-bbox="535 789 1346 1012"> <thead> <tr> <th></th> <th>Amount Requested</th> <th># of Persons Placed</th> <th>Rate per Person Placed</th> <th>Total Points</th> </tr> </thead> <tbody> <tr> <td>Example:</td> <td><i>\$1,000,000</i></td> <td><i>250</i></td> <td><i>\$4,000</i></td> <td><i>10 Points</i></td> </tr> </tbody> </table>	Rate Per Person Placed	Total Points	\$4,500 or less	10 Points	\$4,501 - \$4,999	5 Points	\$5,000 and over	0 Points		Amount Requested	# of Persons Placed	Rate per Person Placed	Total Points	Example:	<i>\$1,000,000</i>	<i>250</i>	<i>\$4,000</i>	<i>10 Points</i>	10
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Example:	<i>\$1,000,000</i>	<i>250</i>	<i>\$4,000</i>	<i>10 Points</i>																
Budget Distribution Table	<p>Did the applicant accurately complete the proposed budget distribution table?</p> <p>0 Points: The applicant did not accurately complete the proposed budget distribution table.</p> <p>5 Points: The applicant accurately completed the proposed budget distribution table.</p>	5																		
Total Points Possible		105																		

Attachment 2: Sample Grant Agreement

GRANT AGREEMENT BETWEEN THE
DEPARTMENT OF HEALTH CARE ACCESS AND INFORMATION AND
[Grantee Name]
For The
PEER PERSONNEL TRAINING AND PLACEMENT PROGRAM
GRANT AGREEMENT NUMBER **[Grant Number]**

THIS GRANT AGREEMENT (“Agreement”) is entered into on **[Term Start]** (“Effective Date”) by and between the State of California, Department of Health Care Access and Information (hereinafter “HCAI”) and **[Grantee Name]**, (the “Grantee”).

WHEREAS, \$8,500,000 may be provided for peer training and support functions to facilitate the deployment of peer personnel as an effective and necessary service to clients, family members, and caregivers.

WHEREAS, Welfare and Institutions Code Section 5822(g) statutorily authorizes HCAI to engage in activities that promote the employment of mental health consumers and family members in the mental health system.

WHEREAS, HCAI supports health care accessibility through the promotion of a diverse and competent workforce while providing analysis of California's healthcare infrastructure and coordinating healthcare workforce issues.

WHEREAS, counties and community stakeholders have identified the need to train, support, and place consumer and family members in peer personnel.

WHEREAS, supporting consumer and family member employment is included as a priority strategy under the Mental Health Services Act (MHSA).

WHEREAS, the Grantee applied to participate in the Peer Personnel Training and Placement program, by submitting an application in response to the Peer Personnel Training and Placement Application.

WHEREAS, the Peer Personnel Training and Placement program shall support, train, and place individuals who are currently or seeking to be employed and/or volunteer as peer personnel, including consumers and family members, by engaging in recruitment and outreach, career counseling, training, placement, and support activities with a priority focus on peer personnel placement/employment.

WHEREAS, the Grantee was selected by HCAI to receive grant funds through procedures duly adopted by HCAI for the purpose of administering such grants.

NOW THEREFORE, HCAI and the Grantee, for the consideration and under the conditions hereinafter set forth, agree as follows:

A. Definitions

1. "Application" means the grant application/proposal submitted by Grantee.
2. "Consumer" means as referred to as Client in Title 9, CCR, Section 3200.040, is an individual of any age who is receiving or has received mental health services. The term "client" includes those who refer to themselves as clients, consumers, survivors, patients or ex-patients.
3. "Caregivers" means adoptive parents and their partners, foster parents and their partners, and grandparents and their partners, who are now or have in the past been the primary caregiver for a child, youth, or adolescent with a mental health challenge who accessed mental health services.
4. "Deputy Director" means the Deputy Director of the Healthcare Workforce Development Division (HWDD) or their designee.
5. "Direct Program Costs" are defined as costs that can be more directly attributed to the completion of program activities, which can include, but not be limited to: salaries for program staff, materials/supplies required for program activities, program consultants/contractor, and travel.
6. "Director" means the Director of HCAI or his/her designee.
7. "Family Member" means siblings, and their partners, kinship caregivers, friends, and others as defined by the family who is now or was in the past the primary caregiver for a child, youth, adolescent, or adult with a mental health challenge who accessed mental health services.
8. "Grant Agreement/Grant Number" means Grant Number awarded to Grantee.
9. "Grantee" means the fiscally responsible entity in charge of administering the Grant Funds and includes the Program identified in the Grant Application.
10. "Grant Funds" means the money provided by HCAI for the Project described by Grantee in its Application and Scope of Work.
11. "Indirect Program Cost" is defined as the cost indirectly attributed to the completion of the program services, which can include, but not be limited to: utilities, rent, and administrative service/payroll staff.
12. "Parents" means biological parents and their partners, who are now or have in the past been the primary caregiver for a child, youth, or adolescent with a mental health challenge who accessed mental health services.

13. "Peer Personnel" means individuals with experience as a mental/behavioral health services consumer, family member, and/or caregiver placed in designated peer positions within the Public Mental Health System. The term "peer" is not required to be in the job title.
14. "Placement" means assignment in a peer personnel position as a paid employee or unpaid volunteer in the Public Mental Health System.
15. "Program" means the Grantee's training program(s) listed on the grant application.
16. "Program Representative" means the representative of the Grantee for which Agreement funds are being awarded.
17. "Project" means the activity described in the Grantee's application and Scope of Work to be accomplished with the grant Funds.
18. "Program Manager" means the HCAI manager responsible for the grant program.
19. "Public Mental Health System (PMHS)" means publicly-funded mental health programs and/or services and entities that are administered, in whole or in part, by the State or one or more counties. It does not include programs and/or services administered, in whole or in part by federal, state, county or private correctional entities. Title 9, CCR, 3200.254

Any organization that meets this definition would be considered a PMHS site.
20. "State" means the State of California and includes all its Departments, Agencies, Committees and Commissions.

- B. Term of the Agreement: This Agreement shall take effect on **[Agreement Start Date]** and shall terminate on **[Agreement End Date]**.

All requests for amending the term of this agreement shall Comply with the amendment requirements stated in Section K of this Agreement. Requests for an extension must be made no later than ninety calendar days prior to the termination of the Agreement. This Agreement cannot be amended after its termination.

C. Scope of Work

1. Consistent with this Agreement, Grantee agrees to perform all activities specifically identified in the Grantee's application and submitted by the Grantee in response to Peer Personnel Training and Placement Grant Guide for FY 2024-25, including the work plan prepared and submitted by the Grantee.
2. While performing the activities defined in Section C. Scope of Work, Item 1, the Grantee shall:

- a. Include individuals with lived experience, including consumers, family members, and caregivers in the design and delivery of program activities.
- b. Ensure there is continued engagement and coordination with partner county, CBO, education institutions, and/or training entities.
- c. Ensure focus on innovative, evidence-based and community-identified strategies to achieve the goal of training and placing peer personnel.
- d. Ensure that all program activities are consistent with MHSA values and priorities, including wellness, recovery and resiliency principles. Ensure that all services are consistent with the work plan and schedule outlined in the application.
- e. Ensure that the program is a DHCS recognized training provider or contract with a DHCS recognized training provider that meets the Medi-Cal Peer Support Specialist training provider requirements. DHCS contracted with California Mental Health Services Authority (CalMHSA) to select Medi-Cal Peer Support Specialist training providers.
 1. DHCS Medi-Cal Peer Support Specialist program information located at: <https://www.dhcs.ca.gov/services/Pages/Peer-Support-Services.aspx>
 2. CalMHSA list of approved Medi-Cal Peer Support Specialist training providers can be found at: <https://www.capeercertification.org/training-for-medi-cal-peer-support-specialist/>
- f. Assess the eligibility of participants to meet the grandparenting provisions of the DHCS Medi-Cal Peer Support Specialist Certification Program and/or provide the 80-hour mandatory DHCS Medi-Cal Peer Support Specialist Certification Program training requirements.

3. Requirements

- a. The Grantee shall not conduct lobbying activities as part of this Agreement.
- b. The Grantee shall be held fully accountable for proper use of all funds under this Grant Agreement.
- c. The Grantee will credit HCAI and the MHSA in all publications resulting from this Grant Agreement.

D. Program Reports

1. The Grantee shall complete quarterly certifications using the Peer Personnel Training and Placement Quarterly Certifications found within the <https://funding.hcai.ca.gov/> portal. The Grantee shall submit quarterly certifications in accordance with the following schedule:

Report/Activit	Reporting Period	Due Date
Quarter 1 Cerification	July 01, 2024 - September 30, 2024	October 31, 2024
Quarter 2 Cerification	October 01, 2024 - December 31, 2024	January 31, 2025
Quarter 3 Cerification	January 01, 2025 - March 31, 2025	April 30, 2025
Quarter 4 Cerification	April 01, 2025 - June 30, 2025	July 31, 2025
Quarter 1 Cerification	July 01, 2025 - September 30, 2025	October 31, 2025
Quarter 2 Cerification	October 01, 2025 - December 31, 2025	January 31, 2026
Quarter 3 Cerification	January 01, 2026 - March 31, 2026	April 30, 2026
Quarter 4 Cerification	April 01, 2026 - June 30, 2026	July 31, 2026

2. Under the direction of the Program Director, use Grant Funds to provide Peer Personnel training for **[Number of Participants]** participants within the term of the grant agreement.
3. The Grantee shall administer an HCAI developed demographic survey to individuals receiving/participating in the activities, using the template in Attachment 3 of the Grant Guide, Participant Demographic Information Survey. The results of this demographic survey shall be reported in quarterly certifications.
4. The grantee shall provide individual participant counts through each level in the training process. Quarterly payment amounts will correspond directly with the participant counts provided by the grantee.

E. Invoicing

1. For services satisfactorily rendered in accordance with the Scope of Work and activities outlined in the application, and upon receipt and approval of the payment certification statements, HCAI agrees to compensate the Grantee in accordance with the rates specified in Section F. Budget Detail.
2. The Grantee shall submit certification statements to HCAI for work performed under this Agreement with the associated quarterly progress report. Certification statements will not be paid until HCAI reviews and approves the associated quarterly report.
3. The total amount payable to the Grantee under this Agreement shall not exceed **[Total Award Amount]**.
4. Payment will be made in accordance with, and within the timeframe specified in Government Code Chapter 4.5, commencing with Section 927.

F. Budget Detail

1. HCAI shall provide the Grantee funding for the expenses incurred in

performing the Scope of Work and activities specified in the Grantee’s application. The Grantee shall request the distribution of grant funding consistent with its work plan and the budget tables in the e-app. In no event shall payments under this Agreement exceed the total grant amount.

The reimbursement shall not exceed the following per budget line-item costs:

Budget Line Item	Funding		
	FY 2024-25	FY 2025-26	Total
Recruitment and Outreach	\$	\$	\$
Career Counseling	\$	\$	\$
Training	\$	\$	\$
Financial Assistance	\$	\$	\$
Placement	\$	\$	\$
Support	\$	\$	\$
Evaluation	\$	\$	\$
Indirect Costs	\$	\$	\$
Total Request	\$	\$	\$

2. Summary of Program Costs per Activity

The Grantee shall identify the total Direct Program Costs for each activity to correspond with the activities as provided by the Grantee in the Peer Personnel Training and Placement application. Do not provide sub-activities. The Grantee must also identify the Total Indirect Program Costs for the program. For the purposes of completing the detailed budget below, the following definitions shall apply:

- a. A Peer Personnel Training and Placement Program may be eligible to receive a maximum of **[Calculated Amount Per Participant]** per participant for successfully completing recruitment, training, and support services up to the maximum award amount.
- b. Direct Program Costs are those directly attributed to the completion of a program activity, which may include, but shall not be limited to: salaries for program staff, materials, and supplies required for program activities, program consultants or contractors, and travel.

Indirect Program Costs, not to exceed 10 percent of total direct costs, is indirectly attributed to the completion of the program services, which may include, but are

not limited to, utilities, rent, and administrative services/staff payroll.

3. Accounting for HCAI grant funds shall be in accordance with Generally Accepted Accounting Principles consistently applied, regardless of the source of funds. Supporting records must include sufficient detail to show the exact amount and nature of expenditures and shall be available to HCAI upon request.
4. Reports of program expenditures under this Agreement must be submitted as requested by the state or the HCAI Director for the purposes of program administration, evaluation, or review.
5. Records Retention and Audit:
 - a. The Grantee shall permit access to records maintained on source of income and expenditures for the purpose of audit and examination, by any of the following or their authorized representative: the HCAI Director, the California State Auditor, or the State Controller.
 - b. The Grantee shall maintain books, records, documents, and other evidence pertaining to the costs and expenses of this grant (herein after collectively called the "records") to the extent and in such detail as will properly reflect all net costs, direct and indirect, of labor, materials, equipment, supplies and services, and other costs and expenses of whatever nature for which reimbursement is claimed under the provisions of this Agreement.
 - c. The Grantee agrees to make available at the office of the institution, and at all reasonable times during the period set forth in subsection (d) below, any of the records for inspection, audit, or reproduction by an authorized representative of the State.
 - d. The Grantee shall preserve and make available its records (1) for a period of three years from the date of final payment under this Agreement, and (2) for such longer period, if any, as is required by applicable statute, by any other clause of this Agreement, or by subparagraph (i) or (ii) below:
 - I. If this Agreement is completely or partially terminated, the records relating to the work terminated shall be preserved and made available for a period of three years from the date of any resulting final settlement.
 - II. Records which relate to (1) litigation of the settlement of claims arising out of the performance of this Agreement, or (2) costs and expenses of this Agreement as to which exception has been taken by the state or any of its duly authorized representatives, shall be retained by the Grantee until disposition of such appeals, litigation, claims, or exceptions.

G. Budget Contingency Clause

1. It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this Agreement does not appropriate sufficient funds for the program, this Agreement shall be of no further force and effect. In this event, the HCAI shall have no liability to pay any funds whatsoever to the Grantee or to furnish any other considerations under this Agreement and the Grantee shall not be obligated to perform any provisions of this Agreement.
2. If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this Program, HCAI shall have the option to either cancel this Agreement with no liability occurring to HCAI or offer an Agreement amendment to the Grantee to reflect the reduced amount.

H. Budget Adjustments and Time Extensions

1. Budget adjustments consist of a change within the grantees approved budget that does not amend the total amount of the grant.
2. All requests to change the budget shall be submitted in writing to HCAI for approval and shall include an explanation for the reallocation of funds. An accounting of how the funds were expended will also be submitted with the Final Progress Report.
3. All requests for extending the grant period shall be submitted in writing to HCAI for approval. Requests for a time extension must be made to HCAI no later than 90 calendar days prior to the expiration of the Agreement. HCAI reserves the right to approve or deny any such request; HCAI shall provide approval or denial of said requests to the Grantee in writing. There shall be no activity on an Agreement after its expiration.

I. Executive Order N-6-22-Russia Sanctions:

On March 4, 2022, Governor Gavin Newsom issued Executive Order N-6-22 (the EO) regarding Economic Sanctions against Russia and Russian entities and individuals. "Economic Sanctions" refers to sanctions imposed by the U.S. government in response to Russia's actions in Ukraine, as well as any sanctions imposed under state law. The EO directs state agencies to terminate contracts with, and to refrain from entering any new contracts with, individuals or entities that are determined to be a target of Economic Sanctions. Accordingly, should the State determine Contractor is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for termination of this agreement. The State shall provide Contractor advance written notice of such termination, allowing Contractor at least 30 calendar days to provide a written response. Termination shall be at the sole discretion of the State.

J. General Terms and Conditions

1. **Timeliness:** Time is of the essence in this Agreement. Grantee will submit the required deliverables as specified and adhere to the deadlines as specified in this Agreement. Anticipating potential overlaps, conflicts, and scheduling issues, to adhere to the terms of the Agreement, is the sole responsibility of the Grantee.
2. **Final Agreement:** This Agreement, along with the Grantee's Application, attachments, and forms constitute the entire and final Agreement between the parties and supersedes any and all prior oral or written agreements or discussions.
3. **Ownership and Public Records Act:** All reports and the supporting documentation and data collected during the funding period which are embodied in those reports, shall become the property of the State and subject to the California Public Records Act (Gov. Code § 6250 et seq.).
4. **Audits:** The Grantee agrees that HCAI, the Department of General Services, the State Auditor, or their designated representatives shall have the right to review and to copy any records and supporting documentation pertaining to the performance of this Agreement. The Grantee agrees to maintain such records for possible audit for a minimum of three years after the final payment, unless a longer period of records retention is stipulated by the State. The Grantee agrees to allow the auditor(s) access to such records during normal business hours and to allow interviews of any employees who might reasonably have information related to such records. Further, the Grantee agrees to include a similar right of the State to audit records and interview staff in any subcontract related to performance of this Agreement.
5. **Independence from the State:** Grantee and the agents and employees of the Grantee, in the performance of this Agreement, shall act in an independent capacity and not as officers, employees, or agents of the State.
6. **Non-Discrimination Clause:** Discrimination Clause: During the performance of this contract, contractor and its subcontractors shall not unlawfully discriminate against any employee or applicant for employment because of race, religious creed, color, national origin, ancestry, physical disability, mental disability, reproductive health decision-making, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status. Contractors and subcontractors shall insure that the evaluation and treatment of their employees and applicants for employment are free of such discrimination. Contractors and subcontractors shall comply with the provisions of the Fair Employment and Housing Act (Gov. Code, § 12900 et seq.) and the applicable regulations promulgated thereunder (Cal. Code Regs., tit. 2, § 11000 et seq.). The applicable regulations of the Civil Rights Council implementing Government Code section 12990, set forth in Subchapter 5 of Division 4.1 of Title 2 of the California Code of Regulations are incorporated into this contract by reference and made a part hereof as if set forth in full. Contractor and its subcontractors shall give written notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other agreement.

7. Waiver: The waiver by HCAI of a breach of any provision of this Agreement by the Grantee will not operate or be construed as a waiver of any other subsequent breach. HCAI expressly reserves the right to disqualify the Grantee from any future grant awards for failure to comply with the terms of this Agreement.
8. Approval: This Agreement is of no force or effect until signed by both parties. The Grantee may not commence performance until such approval has been obtained.
9. Amendment: No amendment or variation of the terms of this Agreement shall be valid unless made in writing, signed by the parties, and approved as required. No oral understanding or Agreement not incorporated in this Agreement is binding on any of the parties.
10. Assignment: This Agreement is not assignable by the Grantee, either in whole or in part, without the consent of HCAI in the form of a formal written amendment.
11. Indemnification: Grantee agrees to indemnify, defend, and hold harmless the State, its officers, agents and employees (i) from any and all claims and losses accruing or resulting to any and all Grantee's, subcontractors, suppliers, laborers, and any other person, firm, or corporation furnishing or supplying work services, materials, or supplies resulting from the Grantee's performance of this Agreement, and (ii) from any and all claims and losses accruing or resulting to any person, firm, or corporation who may be injured or damaged by the Grantee in the performance of this Agreement.
12. Disputes: Grantee shall continue with the responsibilities under this Agreement during any dispute. Any dispute arising under this Agreement shall be resolved as follows:
 - a. The Grantee will discuss the problem informally with the Program Manager. If unresolved, the problem shall be presented, in writing, to the Deputy Director stating the issues in dispute, the basis for the Grantee's position, and the remedy sought. Grantee shall include copies of any documentary evidence and describe any other evidence that supports its position with its submission to the Deputy Director.
 - b. Within ten (10) working days after receipt of the written grievance from the Grantee, the Deputy Director or their designee shall make a determination and shall respond in writing to the Grantee indicating the decision and reasons for it.
 - c. Within ten (10) working days of receipt of the Deputy Director's decision, the Grantee may appeal the decision of the Deputy Director by submitting a written appeal to the Chief Deputy Director stating why the Grantee does not agree with the Deputy Director's decision.

- d. Within ten (10) working days, the Chief Deputy Director or their designee shall respond in writing to the Grantee with their decision. The Chief Deputy Director's decision will be final.

13. Termination for Cause: HCAI may terminate this Agreement and be relieved of any payments should the Grantee fail to perform the requirements of this Agreement at the time and in the manner herein provided. Grantee shall return any Agreement Funds that were previously provided to Grantee for use within 60 days of termination.

If all grant funds have not been expended upon completion of the Agreement term, HCAI will request the remittance of all unexpended funds. If HCAI determines that improper payments have been made to Grantee, HCAI will request disgorgement of all disallowed costs. Grantee may dispute disallowed costs in accordance with Section I, Paragraph 12. Grantee will submit a check or warrant for the amount due within 60 days of the Grantee's receipt of HCAI's disgorgement request or 30 days from the Grantee's receipt of HCAI's last Dispute decision. If Grantee fails to remit payment, HCAI may withhold the amount due from any future grant payments.

14. Grantee's Subcontractors: Nothing contained in this Agreement shall create any contractual relationship between the State and the Grantee or any subcontractors, and no subcontract shall relieve the Grantee of its responsibilities and obligations hereunder. The Grantee agrees to be fully responsible to the State for any and all acts and omissions of its subcontractors and of persons either directly or indirectly employed by the Grantee. The Grantee's obligation to pay its subcontractors is an independent obligation from HCAI's obligation to disburse funds to the Grantee. As a result, the State shall have no obligation to pay or to enforce the payment of any money to any subcontractor.
15. Governing Law: This Agreement is governed by and shall be interpreted in accordance with the laws of the State of California.
16. Unenforceable Provision: In the event that any provision of this Agreement is unenforceable or held to be unenforceable, then the parties agree that all other provisions of this Agreement have force and effect and shall not be affected thereby.

K. Project Representatives:

The representatives of HCAI and the contact information for each party during the term of this Agreement are listed below. Direct all inquiries to:

State Agency: Department of Health Care Access and Information	Grantee: [Contractor Name]
Section/Unit: Office of Health Workforce Development/Peer	Program Name: [Training Program Name]
Name: [Enter Program Officer Name]	Program Director Name:
Address: 2020 West El Camino Avenue, Suite 1222 Sacramento, CA 95833	Address:
Phone: [Enter Program Officer Phone Number]	Phone:
Email: BHPPrograms@HCAI.ca.gov	Email:

Direct all grant inquiries to:

State Agency: Department of Health Care Access and Information	Grantee: [Contractor Name]
State Agency: Department of Health Care Access and Information	Program Name: [Training Program Name]
Section/Unit: Office of Health Workforce Development/Peer	Name of Representative:
Name: [Enter Program Officer Name]	Address:
Address: 2020 West El Camino Avenue, Suite 1222 Sacramento, CA 95833	Phone:
Phone: [Enter Program Officer Phone Number]	Email:
Email: BHPPrograms@HCAI.ca.gov	

IN WITNESS WHEREOF, the parties hereto have executed or have caused their duly authorized officers to execute this Agreement as of the date first written above.

DEPARTMENT OF HEALTH CARE
ACCESS AND INFORMATION

GRANTEE: «Grantee Name»

Signature:

Signature:

Name:

Name:

Title:

Title:
