

# **Welcome to the** ***Behavioral Health Recovery Services*** **Onboarding Webinar**

## **November 17, 2022**

This opportunity is provided by The Center at Sierra Health Foundation under contract with the California Department of Health Care Services.



## THE CENTER

*at Sierra Health Foundation*

**The Center brings people, ideas and infrastructure together to create a collective impact, helping communities access proven practices while tapping into their existing resources, knowledge and creativity to identify strategies for healthier communities.**

# CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES (DHCS)



The Behavioral Health Recovery Services Project is part of the California Department of Health Care Services' Behavioral Health Response and Rescue Project, which aims to increase access to behavioral health care for all Californians.

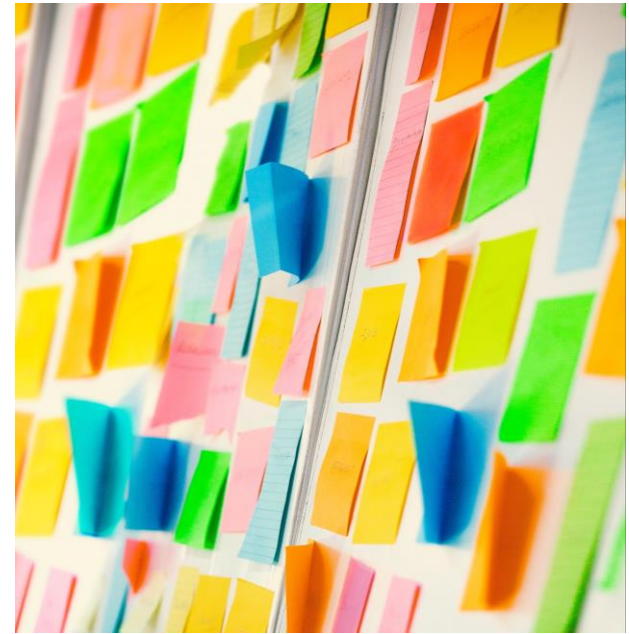
**Mission:** The Department's mission is to provide Californians with access to affordable, integrated, high-quality health care, including medical, dental, mental health, substance use treatment services and long-term care.

**Vision:** Our vision is to preserve and improve the overall health and well-being of all Californians.

**Core Values:** Integrity, Service, Accountability, Innovation

# Housekeeping

- These meetings will be recorded; links to the recordings and slides will be made available to participants
- There will be time for questions and active participation during today's meeting
- Please submit questions or comments throughout the workshop via chat or raise your Zoom hand
- If you are experiencing technical difficulties, please chat the host
- We encourage you to turn on your camera throughout the meeting to promote engagement and create a sense of community



**THE CENTER**  
*at Sierra Health Foundation*



# Learning and Accessibility Needs

Given the essence of the Learning Community our team will be following this slide template in our future meetings allowing participants to easily recognize the Learning Community materials.

If you have any accessibility needs, please advise by contacting [recoveryservices@shfcenter.org](mailto:recoveryservices@shfcenter.org) and [nchavez@healthmanagement.com](mailto:nchavez@healthmanagement.com) at the end of today's presentation



# WELCOME



# Today's Agenda:

- Welcome & Introductions
- The Center's Role
- Why are we Here
- Project Scope of Work and Deliverables
- Contacts and Resources
- Questions and Answers



# INTRODUCTIONS





# ROLES



## **The Center at The Sierra Health Foundation (The Center)**

- Execute subcontract agreements with Program Services Providers (PSPs) identified by DHCS
- Collect program and budget reports from funded partners and submit consolidated reports to CA. Dept. of Health Care Services (DHCS)
- Communicate regularly with DHCS
- Participate in HEAR Us Program meetings

## **California Department of Health Care Services (DHCS)**

- Federal funding awardee from SAMSHA
- Policy development and implementation

## **Health Management Associates Community Strategies (HMACS)**

- Monthly Check-In Meetings
- Project Support and Project Resources
- Data collection processes
- Processing of data submissions
- Development of PowerPoint Presentations for Engagement

# Your Team

## The Center



**Nilda Valmores**  
Senior Program  
Officer  
nvalmores@sierrahealth.org



**Matt Cervantes**  
Managing Director,  
Healthy Youth  
Development  
mcervantes@sierrahealth.org



**Matt Curtis**  
Managing Director, Health  
Equity and Access  
mcurtiss@sierrahealth.org



**Danielle Claybon**  
Program Associate  
dclaybon@sierrahealth.org



**Rami Arafah**  
Evaluation Officer  
rarafah@sierrahealth.org

## HMA



**Leticia Reyes-Nash**  
Principal  
lreyesnash@healthmanagement.com



**John O'Connor**  
Managing Director  
joconnor@healthmanagement.com



**Nayely Chavez**  
Senior Consultant  
nchavez@healthmanagement.com



**Michelle Ford**  
Principal  
mford@healthmanagement.com



**Laura Collins**  
Senior Consultant  
lcollins@healthmanagement.com

# Funded Partners

- CA Association of Alcohol and Drug Program Executives, Inc
- Cal Voices
- California Black Women's Health Project
- California Consortium of Addiction Programs and Professionals
- California Council of Community Mental Health Agencies (DBA: California Council of Community Behavioral Health Agencies)
- Hathaway-Sycamores Child and Family Services (DBA Sycamores)
- NAMI California
- Peer Voices of Orange County Inc.
- The California Association of DUI Treatment Programs
- The Happier Life Project
- United Parents
- West Fresno Health Care Coalition (dba: West Fresno Family Resource Center)

# Community Building Activity

Introduce yourself and share one word that describes how you are feeling today.

**Hello, my name is....**

Name

Pronouns

Role and Tenure

Share one word about how you are feeling today.



**THE CENTER**  
*at Sierra Health Foundation*



# WHY ARE WE HERE?



# *Behavioral Health Recovery Services*

## *HEAR US*

### Programmatic Components



# CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES (DHCS)



**THE CENTER**  
*at Sierra Health Foundation*



# Project Purpose

The overarching goal of the project is to **increase the number and quality** of culturally responsive behavioral health recovery services and programs statewide that are tailored to local needs.

Project period:  
November 2022 – July 2023



**THE CENTER**  
*at Sierra Health Foundation*





# The Center's responsibilities:

- Execute grant agreements with Program Services Providers (PSPs) identified by DHCS
- Collect program and budget reports from subgrantees and submit consolidated reports to CA. Dept. of Health Care Services (DHCS)
- Convene funded partners and other organizations identified by DHCS quarterly to provide technical assistance on administrative and program requirements and delivery of services
- Communicate regularly with DHCS
- Participate in HEAR Us Program meetings
- Administer any additional funds, partnering with DHCS to identify subgrantees



**THE CENTER**  
*at Sierra Health Foundation*

# HMA Community Strategies

## Who we are

To address the social needs that affect public healthcare, HMA formed HMA Community Strategies® (HMACS) in 2014. The HMACS team works directly with communities to identify needs and organize around them. We also work with community-based organizations, policymakers, and healthcare payers and entities to identify and implement solutions.

## What we do

HMACS helps communities tackle problems that impact health outside the walls of hospital, provider and payer offices, such as inadequate housing and food access, health equity and disparities, violence, discrimination, unemployment and underemployment. Because good health is more than just good healthcare — it's a process that begins at the roots of our communities with basics like healthy food, clean air, safe housing and equitable treatment.



# Project Purpose:

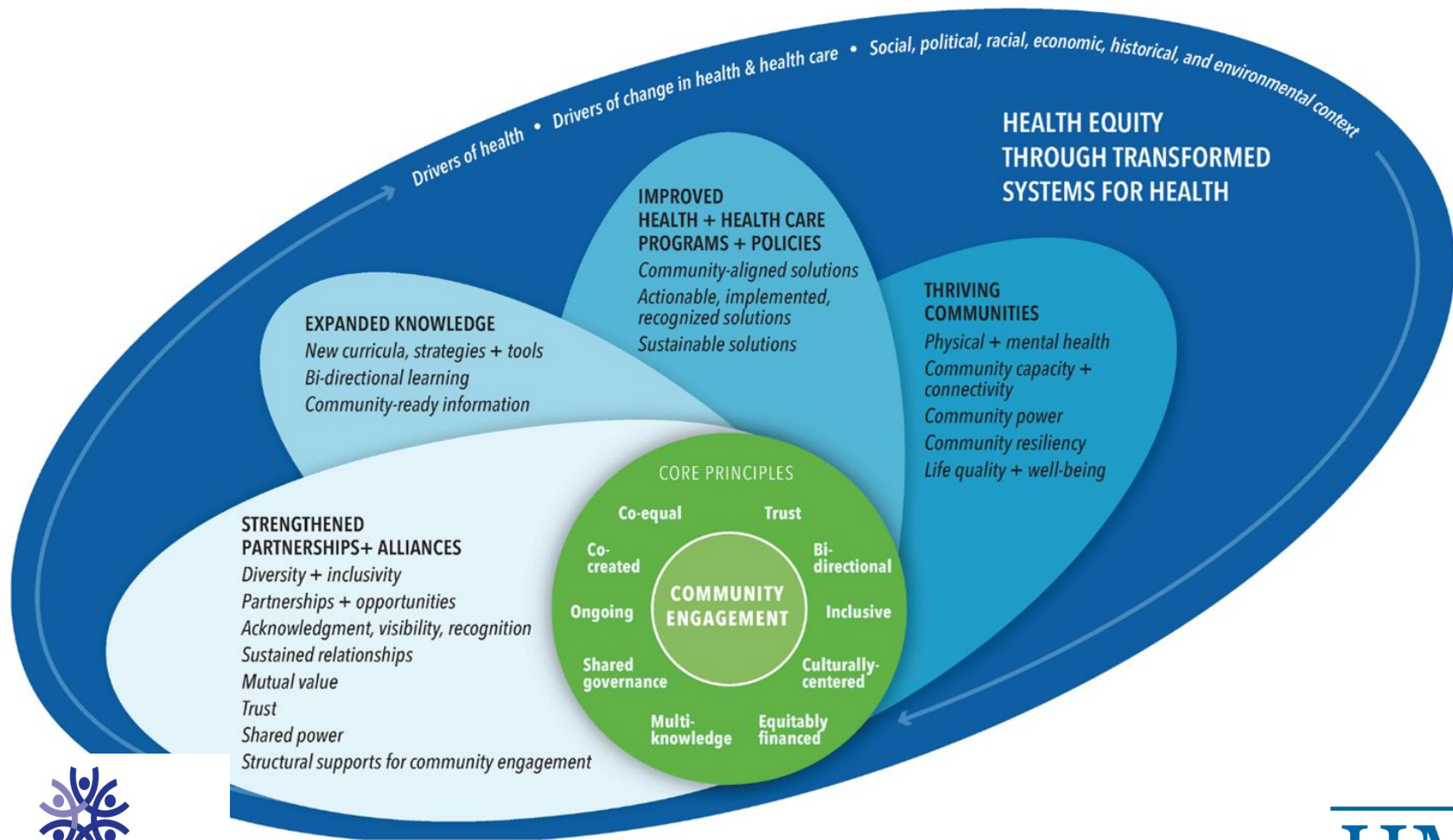
- To implement a **community-driven process** that will develop “**standards of care**” that build on the SAMSHA guidance for recovery services and address gaps in services and supports. Of particular interest are peer-led programming and consistency with a focus on **higher quality of care** for those engaged in recovery services, with a focus on traditionally underserved populations including **Black, Indigenous, People of Color (BIPOC) and the 2S/LGBTQ+**



**THE CENTER**  
at Sierra Health Foundation



# Health Equity Model:



**THE CENTER**  
at Sierra Health Foundation

**HMA**  
HEALTH MANAGEMENT ASSOCIATES

# PRINCIPLES FOR EQUITY- CENTERED DESIGN

**Disaggregate data** to understand the unique experiences and outcomes for subpopulations

**Design, implement, and continuously improve** policies and programs that recognize the unique experiences and outcomes of **subpopulations** and **support health for all people** ([CMS](#))

**Include people with lived experiences** when designing and evaluating solutions ([Center for Health Care Strategies](#))

Create **inclusive and equitable meeting** processes and environments ([Harvard Office of Diversity, Inclusion & Belonging](#))

**Shared governance and decision making** to develop recommendations

Center approach development from an **antiracist perspective** ([NEJM Catalyst](#))

**Share data** across governmental agencies and community-based organizations is critical for addressing complex health challenges involving multiple sectors ([Center for Health Care Strategies](#))



**THE CENTER**  
at Sierra Health Foundation



# HEAR US GRANT PROJECT OVERVIEW

The **HEAR US** Phase 1, November 15, 2022 – July 31, 2023, funding activities up to support the following:

- ❑ **Participation of specialized behavioral health-focused staff (i.e. peer providers, therapists, wellness and recovery coaches, etc.) from the funded organizations in the standards of care development process (with monthly engagement w/The Center/HMA).**

Examples of Funded Activities:

- Personnel for participating in monthly sessions
- Technology and technology access to join development sessions (e.g., laptops, webcams, zoom account)
- Travel for possible in-person sessions



**THE CENTER**  
*at Sierra Health Foundation*



# HEAR US GRANT PROJECT OVERVIEW (CONTINUED)

- ❑ **Organizing, facilitating, and documenting constituency-focused (i.e., clients, consumers, family members, residents) generative listening sessions and/or focus groups to inform the development of the standards of care (at least three sessions over the 10-month project term)**

Examples of allowable activities include, but are not limited to:

- Personnel for planning, implementing, and reporting on listening sessions and/or focus groups
- Meeting space
- Food
- Technology and technology access (e.g., laptops, webcams, zoom account)
- Non-cash incentives for volunteer participation\*
- Travel for staff and volunteers for possible in-person sessions
- Educational materials development and distribution
- Outreach and awareness materials development and distribution



**THE CENTER**  
*at Sierra Health Foundation*



# HEAR US GRANT PROJECT OVERVIEW (CONTINUED)

HEAR US Learning Community

- ❑ **Training and engagement of funded partners' constituency (i.e., clients, consumers, family members, residents) to co-lead, facilitate, and participate in standards of care development process focus groups and/or listening session (at least monthly engagement)**

Examples of allowable activities include, but are not limited to:

- Personnel for Training Volunteer curriculum development
- Non-case incentives for volunteer participation\*
- Educational materials development and distribution
- Facilitation services
- Translation services



**THE CENTER**  
*at Sierra Health Foundation*

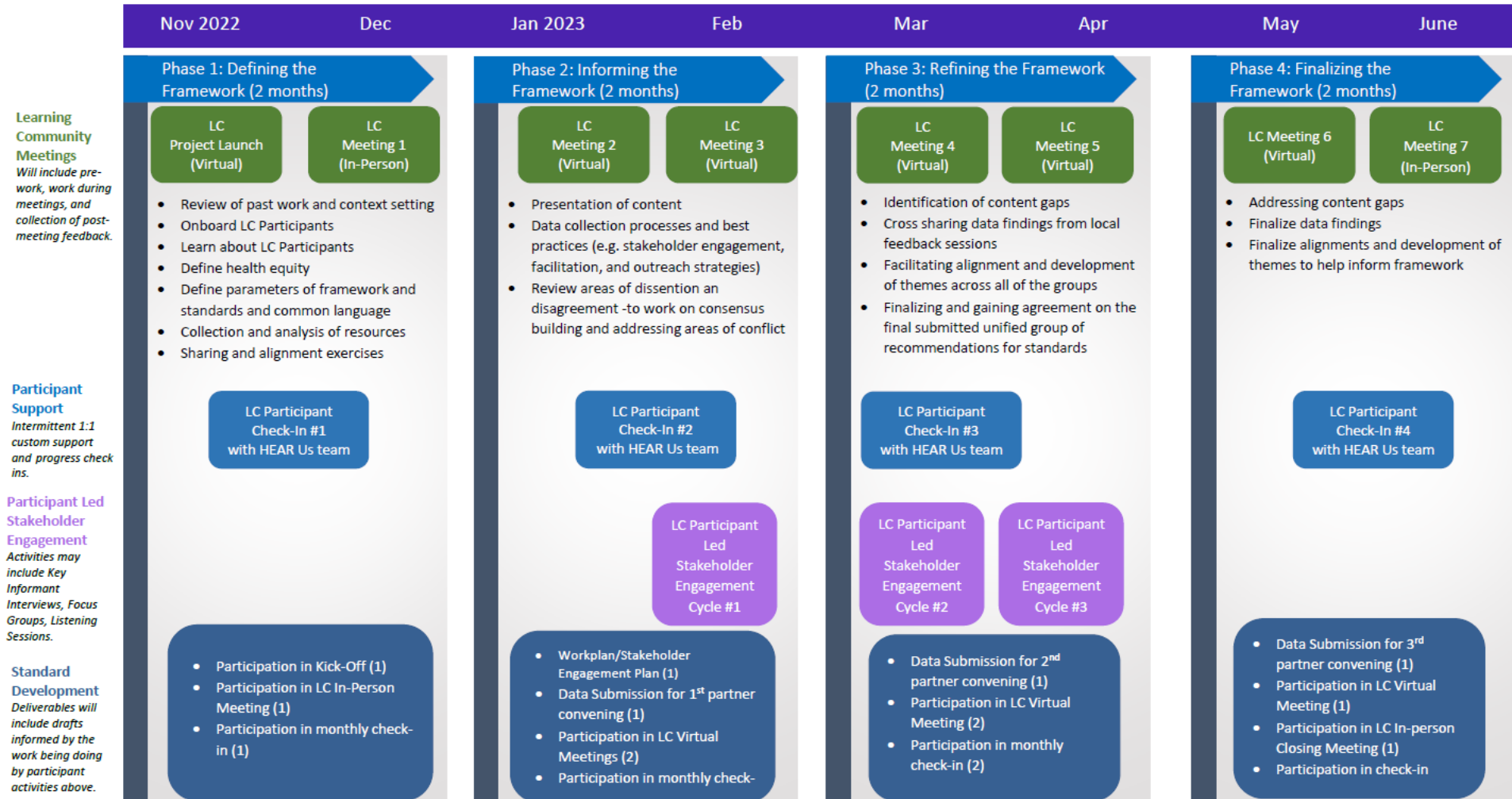




# Process Overview

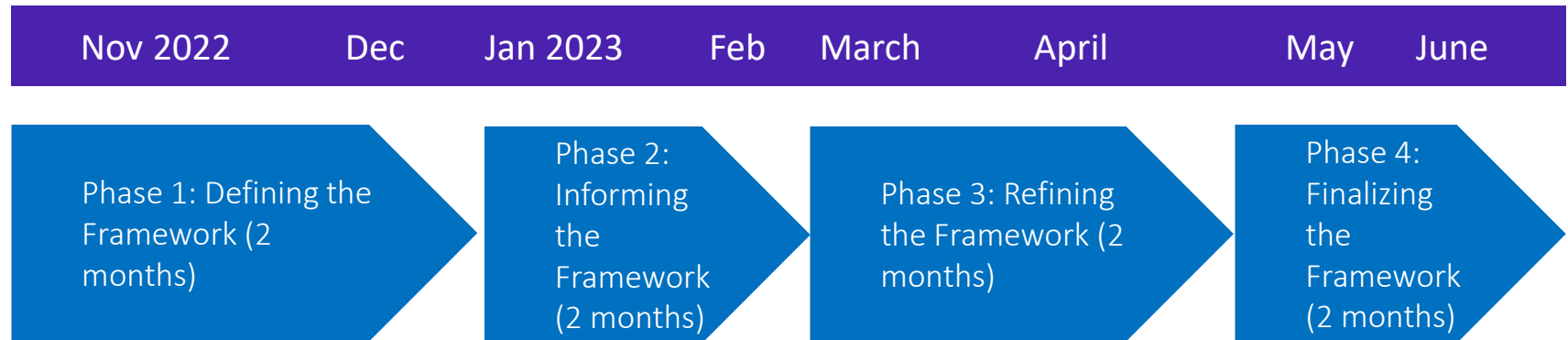


# “STANDARDS OF CARE” DEVELOPMENT PROCESS OVERVIEW



# "STANDARDS OF CARE" DEVELOPMENT PROCESS OVERVIEW

HEAR US Learning Community



**THE CENTER**  
*at Sierra Health Foundation*



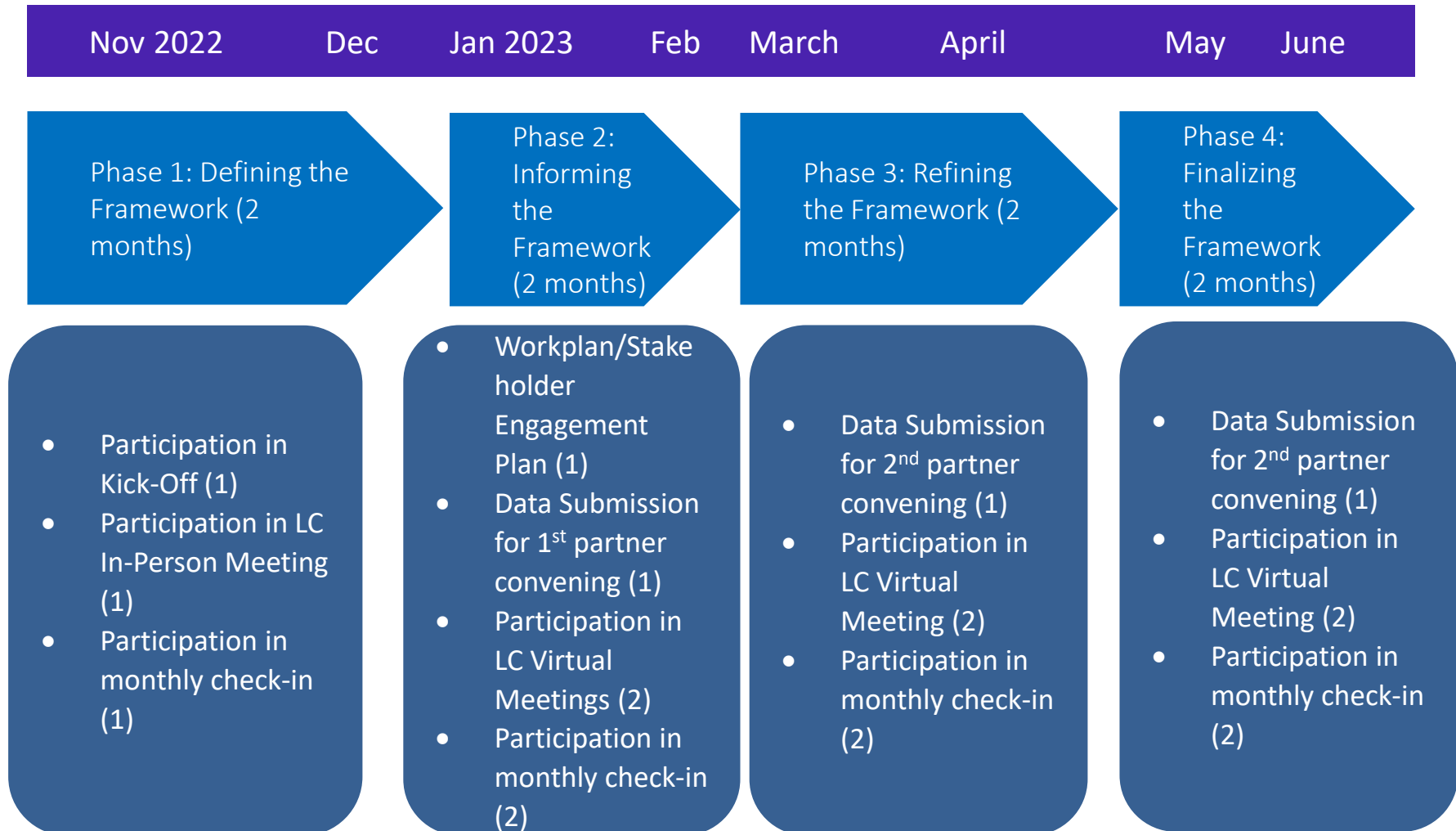
# Deliverables



**THE CENTER**  
*at Sierra Health Foundation*



# DELIVERABLES



# Roles

# Subgrantee Expectations

- Agreements
- Timeline
- Payments
- Reports
- Budget Modifications



**THE CENTER**  
*at Sierra Health Foundation*

# Insurance Components



**THE CENTER**  
*at Sierra Health Foundation*



# Insurance Requirements

- Insurance compliance documents must be submitted to The Center within **30 days** of executing your agreement.
- Insurance must be maintained through the duration of the project and renewed if necessary.
- Contact [vestall@sierrahealth.org](mailto:vestall@sierrahealth.org) ASAP for assistance if your organization is unable to obtain the required insurance.
- **Important: Additional insureds must be written exactly as stated in your contract agreement. Payments will not be released until accurate and complete insurance requirements are received.**
- Endorsements requested by the State must be physically attached to all requested certificates of insurance and not substituted by referring to such coverage on the certificate of insurance.



**THE CENTER**  
*at Sierra Health Foundation*

# Insurance Evidence Requirements

## Commercial General Liability

- Each Occurrence must be greater than or equal to \$1,000,000
  - Coverage Trigger: Occurrence must be present
  - Insurance is written on an occurrence basis using ISO form CG 0001 or equivalent
- General Aggregate must be greater than or equal to \$2,000,000
- Products/Completed Operations Aggregate must be greater than or equal to \$2,000,000
- Personal and Advertising Injury must be present
- Primary and Non-Contributory Endorsement must be present
- Additional Insured Endorsement must be present, naming The Center, Sierra Health Foundation, DHCS, The State of California, their respective officers, directors, agents, representatives, constituent entities, affiliates, volunteers, of subsidiaries, and employees
  - With Completed Operations language
  - Using a combination of ISO forms CG2010 10/04 and CG 2037 10/04



**THE CENTER**  
at Sierra Health Foundation

# Insurance Evidence Requirements

## Automobile Liability

- Combined Single Limit (each accident) must be greater than or equal to \$1,000,000
- Coverage applies to Owned, Hired and Non-owned Autos
- Additional Insured Endorsement must be present naming The Center, Sierra Health Foundation and The State of California

## Workers' Compensation and Employer's Liability

- Statutory Limits must be present
- Employer's Liability Each Accident must be greater than or equal to \$1,000,000
- Employer's Liability Disease – each employee must be greater than or equal to \$1,000,000
- Employer's Liability Disease – policy limit must be greater than or equal to \$1,000,000
- Waiver of Subrogation Endorsement must be present

## Professional Liability

- Each Claim must be greater than or equal to \$1,000,000
- Aggregate must be greater than or equal to \$2,000,000



**THE CENTER**  
at Sierra Health Foundation

# Insurance Evidence Requirements

## Improper Sexual Contact and Physical Abuse Insurance

- Coverage must be greater than or equal to \$1,000,000

## Cyber Liability

- Claims made Coverage must be greater than or equal to \$1,000,000

## Additional Requirements

- Certificate Holder must read: Sierra Health Foundation, 1321 Garden Highway Sacramento, CA 95833
- A.M. Best rating of at least A-:VI
- Description of Operations must read: The Center, Sierra Health Foundation, The State of California, their respective officers, directors, agents, representatives, constituent entities, affiliates, volunteers, officials, parents, subsidiaries, and employees shall be added as Insureds (“additional Insureds”) under each commercial general liability and automobile insurance policy. **Agreement #**\_\_\_\_\_ **must be present.**



**THE CENTER**  
*at Sierra Health Foundation*

# Certificate of Liability Insurance (aka: COI)

**ACORD®** **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY)

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the

SAMPLE

**CONTACT**  
NAME: \_\_\_\_\_ FAX: \_\_\_\_\_  
PHONE: \_\_\_\_\_  
A/C No. Ext.: \_\_\_\_\_  
MAIL: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_

**INSURER(S) AFFORDING COVERAGE** NAIC #

INSURER A: \_\_\_\_\_  
INSURER B: \_\_\_\_\_  
INSURER C: \_\_\_\_\_  
INSURER D: \_\_\_\_\_  
INSURER E: \_\_\_\_\_  
INSURER F: \_\_\_\_\_

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR	WORK	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>GENERAL LIABILITY</b>						
	COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE \$
	CLAIMS-MADE <input type="checkbox"/> OCCUR <input type="checkbox"/>						DAMAGE TO RENTED PREMISES (Ea occurrence) \$
							MED EXP (Any one person) \$
							PERSONAL & ADV INJURY \$
							GENERAL AGGREGATE \$
	GEN'L AGGREGATE LIMIT APPLIES PER:						PRODUCTS - COMPIOP AGG \$
	POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/>						
	<b>AUTOMOBILE LIABILITY</b>						
	ANY AUTO						COMBINED SINGLE LIMIT (Ea accident) \$
	ALL OWNED AUTOS						BODILY INJURY (Per person) \$
	SCHEDULED AUTOS						BODILY INJURY (Per accident) \$
	NON-OWNED AUTOS						PROPERTY DAMAGE (Per accident) \$
	Hired AUTOS						
	<b>UMBRELLA LIAB</b>						EACH OCCURRENCE \$
	EXCESS LIAB						AGGREGATE \$
	OCCUR <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/>						
	DED <input type="checkbox"/> RETENTION \$						
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>						
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/EMBER EXCLUDED? <input type="checkbox"/>						WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER <input type="checkbox"/>
	(Mandatory in NH)						E.L. EACH ACCIDENT \$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$



**THE CENTER**  
at Sierra Health Foundation

# Compliance: Subgrantee Responsibilities

- Participate in required onboarding webinar
- Participate in required quarterly meetings
- Ensure funds are properly tracked and that all expenditures are allowable
- Maintain adequate records supporting grant expenditures
- Submit accurate narrative and financial reports by required due dates
- Respond to all desk review/audit inquiries in a timely manner



**THE CENTER**  
*at Sierra Health Foundation*

# Compliance: Subgrantee Responsibilities

## To support expenditures reported, sub-grantees must:

- Maintain an expenditure listing (G/L detail or other) that details all expenditures charged to the funds received
- Ensure all expenditures are reasonable and tie to and are for the purpose of the project
- Maintain adequate support, including, but not limited to:
  - Purchase orders/requests
  - Vendor invoices/receipts
  - Receiving documentation/packing slips
  - Timesheets/paystubs
  - Consultant or other contracts
  - Check stubs for payments made



**THE CENTER**  
*at Sierra Health Foundation*

# Compliance: Subgrantee Responsibilities

## Expenses must be allowable:

- Ensure expenses are necessary and reasonable for the performance of the grant and allocable to the grant
- Ensure you understand what expenses/costs are allowable under the terms of the grant and your subgrantee agreements
- Reach out to The Center if you have any questions related to allowable costs
- Ensure expenses are reasonable and support the overall project purpose/mission
- Understand what is strictly unallowed per the contract
- Monitor your approved budget (by line item/category)



**THE CENTER**  
*at Sierra Health Foundation*



# ROLES



## **The Center at The Sierra Health Foundation (The Center)**

- Execute subcontract agreements with Program Services Providers (PSPs) identified by DHCS
- Collect program and budget reports from funded partners and submit consolidated reports to CA. Dept. of Health Care Services (DHCS)
- Communicate regularly with DHCS
- Participate in Hear Us Program meetings

## **California Department of Health Care Services (DHCS)**

- Federal funding awardee from SAMSHA
- Policy development and implementation

## **Health Management Associates Community Strategies (HMACS)**

- Monthly Check-In Meetings
- Project Support and Project Resources
- Data collection processes
- Processing of data submissions
- Development of PowerPoint Presentations for Engagement

# CALENDAR OF EVENTS



**THE CENTER**  
*at Sierra Health Foundation*



# Required HEAR US Learning Community Meeting Dates:

Dates	Times	Location
<b>December 7, 2022</b>	10am-3pm PST	Sierra Health Foundation – The Center 1321 Garden Highway, Sacramento, CA 95833
<b>January 26, 2023</b>	9am-11am PST	Zoom
<b>February 23, 2023</b>	9am-11am PST	Zoom
<b>March 23, 2023</b>	9am-11am PST	Zoom
<b>April 27, 2023</b>	9am-11am PST	Zoom
<b>May 25, 2023</b>	9am-11am PST	Zoom
<b>June 22, 2023</b>	10am-3pm PST	In-Person

# QUESTIONS



**THE CENTER**  
*at Sierra Health Foundation*



# NEXT STEPS!

For questions in the future please reach out to  
**[recoveryservices@shfcenter.org](mailto:recoveryservices@shfcenter.org)**



**THE CENTER**  
*at Sierra Health Foundation*



# Next Step: #1

Please register for December 7, 2022,  
in-person convening, 9:00 a.m. – 3:00 p.m.

## **Location:**

Sierra Health Foundation  
1321 Garden Hwy, Sacramento, CA 95833

## **Agenda Overview**

- **Registration/Breakfast/Networking** – 9:00 am-10:00 am
- **Program Overview** – 10:00am-Noon
- **Lunch** – Noon-12:30 pm
- **Keynote Speaker** - 12:30 pm-1:00 pm
- **Working Session** - 1:00 pm-2:30 pm
- **Wrap-Up and Conclusion** – 2:30 – 3:00 p.m.



**THE CENTER**  
*at Sierra Health Foundation*



# Next Step: #2

- Turn in your Insurance!
- Review your budget and your workplan



# THANK YOU!!



**THE CENTER**  
*at Sierra Health Foundation*



[SHFCENTER.ORG](http://SHFCENTER.ORG)