

Round 4 TA Vendor Application Period Guidance for Contracted TA Vendors

Introduction

Overview of PATH

California received targeted expenditure authority for the “Providing Access and Transforming Health” (PATH) initiative as part of its Section 1115 demonstration renewal. PATH intends to scale whole person approaches to care statewide with a clear equity lens, a strong foundation for integrated, comprehensive care, and a smooth transition from Whole Person Care (WPC) and Health Homes that retains investments made by the state, local partners, and the federal government. PATH will provide funding for services to members during the transition to CalAIM and will also provide tools and resources to county and community-based providers including public hospitals, county, city and other government agencies, justice agencies, community-based organizations (CBOs), Medi-Cal Tribal and Designees of Indian Health Programs and others to ensure a successful implementation of Enhanced Care Management (ECM) and Community Supports.

PATH is comprised of multiple aligned initiatives that will support implementation of ECM and Community Supports services in varying ways. Please see the [DHCS PATH page](#) for more detail.

The remainder of this page is focused on the “Technical Assistance (TA) Marketplace initiative,” described below.

Overview of the TA Marketplace Initiative

This initiative makes funding available for the provision of technical assistance (TA) for organizations that provide or intend to provide ECM and/or Community Supports. Applicants may apply for TA support from vendors. TA Vendors are promoted via a virtual “Marketplace,” which serves as a one-stop-shop environment where entities can access TA resources and expertise. The Marketplace is designed, launched, and managed by Public Consulting Group, the PATH Third Party Administrator (TPA), with oversight from DHCS.

TA are available in the following seven Domains, which were determined based on stakeholder listening sessions and the experiences of existing ECM and Community

Supports providers. Note that TA Domains may be revised and expanded throughout the life of the initiative as new TA needs emerge.

Domain 1: Building Data Capacity | Data Collection, Management, Sharing, and Use

This TA Domain includes TA Vendors with the expertise to help TA Recipients build knowledge and implement the systems required to effectively leverage data in their work with and on behalf of Medi-Cal members receiving ECM and Community Supports. Examples of potential TA include:

- » Strategic and tactical support for data collection, exchange, management, and use
- » Workflow redesign necessary to receive, integrate, use, analyze, and share information, including help developing data collection, implementing integration and analysis tools and protocols, and identifying and implementing data management and/or data exchange services
- » Guidance related to implementing electronic health records (EHRs) and care management documentation systems across Medi-Cal Managed Care Plans (MCPs) and community-based organizations (CBOs)
- » Best practices and technical assistance related to billing and coding, including following the [DHCS Billing and Invoicing guidance](#) and [Coding Options](#) and understanding the use of modifiers and intersections with [social determinants of health \(SDOH\) coding](#)
- » Technical assistance related to implementing and modifying data systems to meet identified Medi-Cal MCP data sharing processes and standards
- » Legal support for developing and reviewing data use agreements
- » Leveraging data analytic platforms and analysis to support population health management, including identifying and managing the health and social care needs for individuals needing ECM/CS
- » Use of [DHCS-specified standards](#) for sharing information between ECM Providers and MCPs
- » Support for the design and implementation of analytics that describe the impacts of ECM/Community Supports on Medi-Cal “populations of focus”

Domain 2: Community Supports | Strengthening Services that Address the Social Drivers of Health

This TA Domain includes TA Vendors with expertise in designing, implementing, and improving one or more of the Medi-Cal [“Community Supports”](#) services. Examples of potential TA include:

- » Strategic and tactical support for designing and implementing any one of the fourteen different Community Supports services
- » Resources and training to better understand the continuum of services available for people experiencing homelessness or unstable housing

- » Support for understanding local housing markets in order to strengthen housing navigation services
- » Support for designing workflows to improve transitions from nursing facilities to home and community settings
- » Support for new sobering centers with regards to establishing strong relationships with potential referrals
- » Support for developing processes for identifying and enrolling individuals for the delivery of medically tailored meals (MTMs) based on clearly articulated eligibility criteria
- » Toolkits and training for asthma remediation and/or home accessibility adaptations

Domain 3: Engaging in CalAIM through Medi-Cal Managed Care

This TA Domain includes TA Vendors with the expertise to help TA Recipients better understand and navigate the requirements of CalAIM and Medi-Cal managed care delivery system, as well as leveraging the numerous new opportunities (e.g., CITED, collaborative planning, justice-involved capacity building program, etc.) made available by CalAIM. Examples of potential TA include:

- » Strategic planning and implementation support for developing MCP relationships, executing contracts, and developing systems and processes to adhere to program requirements
- » Support for navigating MCP registration processes to become an ECM or Community Supports provider
- » Support for developing staffing models, qualifications, and ratios for ECM/Community Supports that can help ensure the sustainability of these services
- » Best practices for compliance with CalAIM monitoring, oversight, and program integrity requirements
- » Design and implementation of satisfaction surveys and/or focus groups with individuals receiving ECM/Community Supports to inform overall service delivery improvement
- » Support for eligible entities not yet involved in CalAIM to identify the area(s) in which they would need to build capacity in order to participate successfully in ECM, Community Supports, and/or justice initiatives
- » Support to plan for and project manage reentry for justice involved individuals.

Domain 4: Enhanced Care Management (ECM) | Strengthening Care for ECM “Populations of Focus”

This TA Domain includes TA Vendors with the expertise to help TA Recipients strengthen and improve the delivery of the seven [ECM “Core Services”](#) they provide for Medi-Cal [“Populations of Focus.”](#) Examples of potential TA include:

- » Best practices for outreach to a particular population and/or assistance with developing innovative strategies for engaging high needs individuals within a population
- » Support for designing and implementing a responsive Comprehensive Assessment and Care Management Plan
- » Support for developing and implementing workflows for the coordination of care, including the coordination of and referral to community and social support services
- » Guidance related to designing a responsive set of member and family supports
- » Navigating across behavioral and physical health and social needs
- » Understanding best practices for graduation from ECM to Complex Care Management (CCM) and other supports

Domain 5: Promoting Health Equity

This TA Domain includes TA Vendors with the expertise to help TA Recipients advance health equity through their implementation of ECM/Community Supports and in their work with Medi-Cal members overall. Examples of potential TA include:

- » Best practices and resources for improving outreach to, engagement of, and service delivery for racial and ethnic minorities, people with disabilities, non-English speakers and individuals with limited English proficiency, individuals who identify as LGBTQ+, rural populations, and other historically underserved populations
- » Support for data collection and analysis related to health equity, including the development of health equity-related data tools (e.g., dashboards to monitor progress, standardized surveys to collect data, etc.)
- » Support for developing and implementing language access plans, including the creation of language-specific outreach and education materials
- » Resources and guidance for integrating health equity goals into organization-level strategic and operational planning
- » Resources to support delivery of culturally competent and linguistically appropriate care

Domain 6: Supporting Cross-Sector Partnerships

This TA Domain includes TA Vendors with the expertise to help TA Recipients successfully engage in cross-sector partnerships, including partnerships between MCPs and counties. Examples of potential TA include:

- » Legal and technical assistance to support ECM and Community Supports providers and Medi-Cal MCP contracting processes.
- » Support for designing and implementing care plans (and similar Medi-Cal enrollee-facing tools and resources) that must be shared across agencies and sectors

- » Support for building high-performing, mutually respectful cross-sector teams

Domain 7: Workforce

This TA Domain includes TA Vendors with expertise in recruiting and retaining a well-prepared, high performing workforce, with a particular focus on members of the frontline, clinical, and/or “lived experience” workforces. Examples of potential TA include:

- » Strategic and tactical support for hiring staff needed to effectively deliver ECM and/or Community Supports services and/or services for individuals with a history of justice involvement, including developing job descriptions and outlining recruitment strategies
- » Support for forging relationships with community / local colleges to create workforce pipelines for specific roles
- » Guidance related to designing and implementing Apprentice programs and/or competency-based training programs, including those tailored to new or incumbent staff members with a history of justice involvement
- » Delivery of or access to role-specific core competency and advanced trainings (e.g., trainings for community health workers, peer specialists, recovery coaches, doulas, etc.)
- » Best practices and support for staff members in ECM, Community Supports, and/or justice initiatives on stress management, mental health balance, and work ‘burn out’ prevention

Cross-Cutting Competency | Rural Communities

All TA Domains include TA Vendors with expertise in and hands-on experience with addressing the unique challenges experienced by providers and partner agencies serving rural communities.

DHCS and PCG review requests for TA services on a rolling basis and support applicants in accessing the TA Vendors that will best meet their needs. Eligible entities seeking TA are able to access 1) “Off-the-Shelf” projects (e.g., “ready to go” TA offerings packaged for convenient, efficient delivery) available on the Marketplace, or 2) select a vendor that can provide “Hands-On” TA services (e.g., customized TA projects tailored to the particular needs of the applicant). Note that “Off-the-Shelf” projects are more standardized resources like training programs, well-defined program models or data tools, or best practices guides, that are relevant in a variety of settings with little to no customization. “Hands-On” projects will require the TA applicant and the selected TA Vendor to work together to develop a unique scope of work (SOW) and budget that describe the project and corresponding deliverables.

PATH TA Marketplace Vendor Role and Expectations

PATH TA Marketplace vendors serve an essential role of providing support to diverse groups of stakeholders—specifically with the rollout of ECM and Community Supports. Selected vendors must, at a minimum, demonstrate the following competencies:

- 1) Demonstrated subject matter expertise in one or more TA Domains
- 2) Demonstrated experience and success providing TA to one or more of the entity types eligible to receive TA via the PATH TA Marketplace
- 3) Maintain business licensing or accreditation that meets industry standards, if required
- 4) Maintain a physical presence in California or are capable of effectively providing services virtually
- 5) Demonstrated cultural competency and non-discriminatory practices
- 6) Commitment to participate in any contractually required activities, such as training or onboarding, as required by DHCS or the TPA
- 7) Capability to comply with all reporting and oversight requirements
- 8) Customer references

PATH TA Vendor Application | Round 4 Guidance for Contracted TA Vendors

Contracted TA Vendors selected during the previous TA Vendor Application round may apply during the open Round 4 TA Vendor Application period to:

1. Qualify to provide TA services in additional TA Domains;
2. Add new Off-the-Shelf TA Projects in TA Domains in which they are already qualified; and/or
3. Qualify as a TA Vendor with experience and expertise relevant to the “Rural Communities” cross-cutting competency area.

Contracted TA Vendors may apply for one, two, all, or none of the above options depending on their unique circumstances and priorities.

Completed applications from contracted TA Vendors submitted during Round 4 must be received by **Tuesday, April 30, 2024, 5 PM PT**.

All applications must be submitted using this [link](#). This form currently only permits the submission of one additional TA Domain. If you would like to apply to qualify as an approved TA Vendor in more than one TA Domain, please submit an additional application per TA Domain. You may submit up to 13 Off-the-Shelf (OTS) TA projects as part of your application for an additional TA Domain. If you have more than 13 OTS projects associated with your new Domain application, or more than 10 new OTS projects associated with a previously approved domain that you would like to have reviewed, please submit an additional application for the additional OTS projects. Please note: You may only submit an OTS TA Project for one Domain. Any OTS Project submitted across multiple Domains will only be approved in one Domain. Please be sure to save a copy of your application for your own records.

In order for applications to be considered complete, all components must be filled out (unless otherwise noted) and applications must be signed by an authorized representative. All applications will be reviewed for completeness and accuracy prior to

initiating the review process. If there are any concerns or questions regarding information in the application, the TPA will reach out to applicants to discuss as needed.

Contracted TA Vendors will be notified of application approval or denial via email.

Newly approved TA Domains, Off-the-Shelf TA Projects, and cross-cutting competencies are expected to be included on the PATH TA Marketplace by July 2024.

All contracted TA Vendors will have the opportunity to apply to qualify in additional TA Domains, add new Off-the-Shelf TA Projects, and/or qualify in the cross-cutting competency area during the next TA Vendor Application period, which is expected to open in October 2024.

If you have questions, please reach out to ta-marketplace@ca-path.com.

Application Review

Complete applications from contracted TA Vendors will be reviewed as follows:

1. Applications to qualify in additional TA Domains will be reviewed and scored using the following review criteria:

Review Criteria	Point Value
Capacity to provide high quality TA for PATH TA Recipients in the relevant TA Domain, as evidenced by: <ul style="list-style-type: none">• Narrative description of the applicant's TA Domain-specific experience and expertise• Examples of completed and/or ongoing TA projects in the relevant TA Domain• Experience and qualifications of proposed staff• Previous experience and success providing TA for <u>at least one</u> of the entity types eligible to receive TA through the CalAIM PATH TA Marketplace• Quality of references provided, as appropriate	40
Overall Rating (Applications will be rated out of a possible 40 points)	40

2. Applications to add new Off-the-Shelf TA Projects in TA Domains in which the TA Vendor is already qualified will be reviewed to ensure that proposed Off-the-Shelf TA Projects are:

- a. Capable of helping to advance the goals of the PATH initiative, especially with regards to better enabling TA Recipients to provide high-quality ECM/Community Supports
- b. Relevant to the particular TA Domain
- c. Feasible to implement

Note that these applications will not be scored.

- 3. Applications to qualify as a TA Vendor with experience and expertise relevant to the “Rural Communities” cross-cutting competency will be reviewed to ensure that the information provided is sufficient to demonstrate the applicant’s capacity to provide high quality TA for TA Recipients in rural communities.

Note that these applications will not be scored.

Application Questions

Application questions for contracted TA Vendors seeking to expand their TA offerings as described above are provided here to better enable TA Vendors to plan their application submission(s).

Completed applications from contracted TA Vendors submitted in Round 4 must be received by **Tuesday, April 30, 2024, 5 PM PT.**

Please note that TA Vendors seeking to qualify to provide TA in multiple new TA Domains must complete Section II: TA Domain Experience and Expertise for each new TA Domain in which they seek to qualify.

Section 1: Applicant Information

Contracted TA Vendors must provide a main point of contact for DHCS and the TPA and key organization information for all application types.

Applicant Organization Name	
Organization Tax ID	
Contact Person Name	
Contact Person Title	
Telephone	
Email Address	
Mailing Address	

Section 2: Applicant Experience, Expertise, and/or TA Offerings

Section 2 application questions differ depending on the type of application being submitted, as outlined below:

1. Applications to qualify in additional TA Domains

Please indicate the additional TA Domain(s) for which your organization is seeking to qualify as a PATH TA Vendor. (Please check all that apply)

- ☐ Building Data Capacity | Data Collection, Management, Sharing, Analytics
- ☐ Community Supports | Strengthening Services that Address the Social Drivers of Health
- ☐ Engaging in and Navigating CalAIM and Medi-Cal
- ☐ Enhanced Care Management (ECM) | Strengthening Services that Improve Access to Care for Medi-Cal “Populations of Focus”
- ☐ Promoting Health Equity
- ☐ Supporting Cross-Sector Partnerships
- ☐ Workforce

Please respond to the following questions for each TA Domain for which you are seeking to qualify as a TA Vendor:

TA Domain:

Are you applying to provide Hands-On TA and/or Off-the-Shelf TA? (Please check all that apply)

- ☐ Hands-On TA
- ☐ Off-the-Shelf TA

- » Please briefly describe the experience and expertise that qualifies your organization to serve as a TA Vendor in this TA Domain. (Max 750 words)
- » Please provide brief summaries of up to three TA projects that your organization has completed or in which your organization is currently engaged in this TA Domain. (Max 1,000 words)
- » Please identify the staff members who will serve as key personnel for projects in this TA Domain and provide a brief bio (not to exceed 350 words) for each
- » Please provide two references that can speak to your organization’s qualifications to provide TA in this TA Domain.
- » If your organization is applying to provide Off-the-Shelf TA Projects in this TA Domain, please provide the following information for each Off-the-Shelf TA Project that you would like to make available:
 - Project summary
 - Project goals and objectives

- Estimated project cost
- Estimated time needed to implement the project (e.g., one day, three weeks, ten months, etc.)

2. Applications to add new Off-the-Shelf TA Projects in TA Domains in which the TA Vendor is already qualified

Please provide the following information for each Off-the-Shelf TA Project that you would like to make available:

- Project summary
- Project goals and objectives
- Estimated project cost
- Estimated time needed to implement the project (e.g., one day, three weeks, ten months, etc.)
- Relevant TA Domain(s)

3. Applications to qualify as a TA Vendor with experience and expertise relevant to the “Rural Communities” cross-cutting competency area

Please briefly describe your organization’s expertise and hands-on experience addressing the unique challenges experienced by providers and partner agencies serving rural communities. Please be sure to include at least one example of a TA project that demonstrates your organization’s work specific to rural communities. (Max. 750 words)

Section 3: Attestation

Contracted TA Vendors must provide the following attestation from their organizations authorized representative for all application types.

As the authorized representative of the Applicant, I attest that all information provided in this application is true and accurate to the best of my knowledge.

Name and Title of Authorized Representative

Signature of Authorized Representative

Date