

Technical Assistance (TA) Marketplace Round 5 Vendor Application Guidance for New Applicants

Introduction

This document contains information regarding the PATH TA Marketplace Round 5 Vendor procurement, including guidance and sample application questions. Below are the major sections of this document:

- [Introduction](#)
- [PATH TA Marketplace Vendor Role and Expectations](#)
- [PATH TA Vendor Application Round 5 Guidance](#)
- [Round 5 TA Vendor Application Questions](#)
- [Appendix A: TA Domains](#)

If you have any questions regarding the content of this document, please email ta-marketplace@ca-path.com.

Overview of PATH

[CalAIM](#) is a long-term commitment to transform Medi-Cal, making the program more equitable, coordinated, and person-centered to help people maximize their health and life trajectory. The success of CalAIM will be a model for transformation of the entire health care sector. One of the initiatives under CalAIM, through its of its Section 1115 demonstration renewal, is the “[Providing Access and Transforming Health](#)” (PATH) initiative. 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 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 details. The remainder of this section is focused on the “Technical Assistance (TA) Marketplace initiative,” described below.

Overview of the TA Marketplace

The [TA Marketplace](#) 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 approved TA 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 the California Department of Health Care Services (DHCS).

TA is available in the 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. Information on the TA Domains can be found on the TA Marketplace [TA Domain webpage](#) as well as [Appendix A](#).

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 TA 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. **Please note that DHCS and PCG will not be accepting new applications for Off-the-Shelf projects during Round 5.**

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. Demonstrated experience and success providing TA to entities that fall into one or more of the areas of focus discussed in greater detail below
4. Maintain business licensing or accreditation that meets industry standards, if required
5. Maintain a physical presence in California or are capable of effectively providing services virtually
6. Demonstrated cultural competency and non-discriminatory practices

7. Commitment to participate in any contractually required activities, such as training or onboarding, as required by DHCS or the TPA
8. Capability to comply with all reporting and oversight requirements
9. Customer references

PATH TA Vendor Application Round 5 Guidance

Application

The TA Vendor Application is designed to gather the necessary information for DHCS to vet and register qualified vendors to provide technical assistance through the TA Marketplace. Beginning in Round 5, all applicants must demonstrate their experience with providing TA for the following areas of focus, including for each TA Domain:

- Rural providers
- Justice-involved providers
- Medi-Cal Tribal and Designee of Indian Health Program providers
- Maternal and Child-Serving providers
- Transitional rent providers¹

The Round 5 TA Vendor Application must be completed and submitted online through the [TA Marketplace Vendor webpage](#). Organizations will be prompted to create an account in the TA Vendor console to complete and submit the application. TA Vendors selected in Round 5 are expected to be made available to potential TA recipients by April 2025.

Completed Round 5 TA Vendor Applications must be received by **Friday, January 31, 2025, 5 PM PT**. In order for an application to be considered complete, all components must be filled out (unless otherwise noted) and the application 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. Complete applications will be reviewed and scored based on the review criteria outlined in the next section.

Other Next Steps

Please note that all applicants that submit a completed TA Marketplace Application, regardless of approval status, will receive an email from the TPA requesting the submission of additional post-application materials via email, including labor rates, banking details, and information that will be used to promote the applicant on the TA Marketplace website if they are selected as a TA Vendor.

These post-application materials will not be part of the TA Vendor Application review and approval process, and this request will not constitute notice of approval as a TA Vendor.

¹ Includes organizations serving people experiencing homelessness; may themselves be housing providers or contract with housing providers. See [Transitional Rent Concept Paper 08222024 \(ca.gov\)](#) for additional detail.

Rather, these materials are being collected shortly after TA Vendor Application submission in an effort to 1) minimize the application burden for applicants, and 2) minimize the time between notice of approval and active participation in the TA Marketplace for approved TA Vendors.

Applicants will be notified of their approval or denial via email. Upon approval, PCG will begin developing contractual agreements with the selected vendors. New TA Vendors will not be made available to potential TA recipients until a signed contractual agreement is in place.

Future TA Vendor Procurements

Please note that the TA Vendor Application will re-open for a period of one month approximately every six months, at the discretion of DHCS, to engage new vendors throughout the life of the TA Marketplace initiative. TA Vendors selected during previous TA Vendor Application rounds may also apply during the open application period to 1) qualify to provide TA services in additional TA Domains.

If you have questions about the Round 5 TA Vendor Application or application processes, please reach out to ta-marketplace@ca-path.com.

TA Vendor Application Review Rubric

Complete applications will be reviewed and scored based on the review criteria outlined below.

Review Criteria	Point Value
Cultural competency and capacity to provide TA that is sensitive and responsive to the circumstances of traditionally underserved or marginalized groups, as evidenced by: • Narrative description of the applicant's approach to and experience providing TA that is sensitive and responsive to the circumstances of traditionally underserved or marginalized groups. • Examples of completed and/or ongoing TA projects provided in the application	17.5
Capacity to ensure high-quality, responsive management of TA projects, as evidenced by: • Narrative description of the applicant's approach to developing SOWs and budgets, determining project staffing, monitoring progress, and managing timelines • Narrative description of the applicant's approach to ensuring sound financial management and reporting • The extent to which the applicant has well-defined processes and systems for managing project work and budgets in place	17.5

Familiarity with CalAIM/Medi-Cal and experience providing TA to support CalAIM and/or similar initiatives, as evidenced by: • Narrative description of the applicant's familiarity with CalAIM and Medi-Cal • Current or previous experience providing TA that supports CalAIM for potential TA Recipients and other stakeholders, including examples of completed and/or ongoing TA projects • Current or previous experience providing TA that supports similar initiatives in other states, including the relevance of that TA for CalAIM	25
Capacity to provide high quality TA for PATH TA Recipients in the relevant TA Domain, as evidenced by: • 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 and within <u>at least one</u> of the areas of focus • Quality of references provided, as appropriate	40
Overall Rating (Applications will be rated out of a possible 100 points)	100

Round 5 TA Vendor Application Questions

Round 5 TA Vendor Application questions are provided here to better enable potential applicants to plan their application submission.

Round 5 TA Vendor Application must be completed and submitted online through the [TA Marketplace Vendor webpage](#) by Friday, January 31, 2025, 5 PM PT.

Please note that applicants seeking to qualify to provide TA in multiple TA Domains must complete Section 4: Domain Experience for each TA Domain in which they seek to qualify.

Section 1: Vendor Information

The purpose of this section is to obtain contact and organizational information for the applicant.

Vendor Organization

Please provide the following information about your organization.

Organization Name:

Please select any of the below designations which apply to your organization (Please

check all that apply):

- ☐ Minority owned business
- ☐ Woman owned business
- ☐ Veteran owned business

Street Address:

City:

State:

Zip:

Primary Contact

Please provide the contact information for the individual who will serve as the primary point of contact for the application and oversee your organization's overall engagement with the TA Marketplace.

First Name:

Last Name:

Title:

Phone Number:

Email:

Organization Mission

Please briefly describe your organization, including its mission, and major areas of work (1000 characters limit).

Section 2: Capacity and Payments

The purpose of this section is for the Applicant to provide information on their experience and qualifications to serve as a TA Marketplace vendor. Approved vendors will be expected to report on the performance metrics/milestones defined in the SOW for any TA project for which they are engaged, as well as on any challenges or delays encountered during the course of providing TA. Reporting terms will be clearly outlined during the contracting process with the TPA.

Vendor Capacity

Please complete all questions about your organization's capacity.

Please provide the estimated number of Full-time Employees (FTEs) (i.e., staff members) employed by your organization.

- 1-49
- 50-499
- 500-1000
- 1000+

Please describe your organization's approach to and experience providing TA that is responsive to the needs and circumstances of individuals from traditionally underrepresented or marginalized groups. Please provide specific examples to the extent possible. (4000 characters limit).

Please describe your organization's approach to ensuring high-quality, responsive management for TA projects, including the processes by which your organization develops deliverable/task-based SOWs and budgets, determines project staffing, tracks progress, and manages timelines. Please be sure to clearly identify any systems or resources that your organization leverages to accomplish these tasks. (4000 characters limit).

Please describe your organization's approach to ensuring sound financial management and reporting for TA projects. Please be sure to clearly identify any systems or resources that your organization leverages to support financial management and reporting. (4000 characters limit).

Non-Duplication/Supplantation of Payments

Selected vendors are responsible for utilizing, coordinating and monitoring the uses of the TA Marketplace funding and may be required to report on key aspects of the initiative, as required by DHCS. Funding from this initiative may not duplicate or supplant reimbursement received through other programs/initiatives.

Describe how payments from the TA Marketplace initiative will not duplicate or supplant reimbursement received through other programs/initiatives. (4000 characters limit)

Section 3: Vendor Experience

The purpose of this section is for the Applicant to provide details about their experience with Medi-Cal generally and providing relevant TA to support the implementation of Medi-Cal and/or similar initiatives. Approved vendors will be expected to demonstrate familiarity with Medi-Cal, current or prior experience providing TA to entities that would qualify for services through the TA Marketplace, and experience working with providers within the areas of focus listed below.

Medi-Cal Experience

Please describe your organization's experience with Medi-Cal, including any involvement in providing technical assistance (TA) to support Medi-Cal or similar healthcare initiatives. (Please select "Yes" for all that apply)

☐ Yes / ☐ No Has this organization engaged in TA with any rural providers?

☐ Yes / ☐ No Has this organization engaged in TA with any justice-involved providers?

☐ Yes / ☐ No Has this organization engaged in TA with any Medi-Cal Tribal and Designee of Indian Health Program providers?

☐ Yes / ☐ No Has this organization engaged in TA with any maternal and child-serving providers?

☐ Yes / ☐ No Has this organization engaged in TA with any transitional rent providers?

For each question selected “Yes” above:

Please select the county where TA with [selected area of focus] was provided.

Please provide a description of the services. (2000 characters limit; recommendation to include between three and five concrete examples)

Please select the engagement timeframe: On-going Engagement or Past Engagement.

Other U.S. State Experience

Please describe your organization’s experience with Medicaid programs in other U.S. states, including any involvement in providing technical assistance (TA) to support Medicaid or similar healthcare initiatives.

☐ Yes / ☐ No Has your organization provided TA in other states?

☐ Yes / ☐ No Have you provided or are you currently providing TA to support large-scale Medicaid restructuring or transformation initiatives in other states?

For each question selected “Yes” above: Since you have indicated your organization’s experience with Medicaid programs in other U.S. states, please provide additional details about your specific expertise and involvement.

Please select the state where TA services were provided.

Please select the type of service that was provided:

- Rural providers
- Justice-involved providers
- Medi-Cal Tribal and Designee of Indian Health Program providers
- Maternal and child-serving providers
- Transitional rent providers

Please provide a description of the services, including between three and five concrete examples. (2000 characters limit; recommendation to include between three and five concrete examples)

Please select the engagement timeframe: On-going Engagement or Past Engagement.

Section 4: Domain Experience

In this section, you will have the opportunity to describe your organization's experience and expertise providing TA in one or more TA Domains paired with an area of focus. For any domains and areas of focus you qualify for, your organization's will appear in the TA Marketplace under the Hands-On service type.

Hands-On TA offers a collaborative approach, allowing entities to partner closely with their selected TA vendor to design and implement customized solutions tailored to their unique priorities and needs. TA goals, deliverables, and timelines are developed from the ground up, ensuring that support is highly specific to each entity and project.

Learn more about the domains [here](#).

Please note that “Add TA Domain Experience” and “Add Domain Staff Member” should be repeated for each TA Domain for which you are applying.

Add TA Domain Experience

Please detail your TA experience, including any experience providing TA to the areas of focus.

Learn more about the domains [here](#).

Select Domain.

- Building Data Capacity
- Community Supports
- Engaging in CalAIM through Medi-Cal Managed Care
- Enhanced Care Management (ECM)
- Promoting Health Equity
- Supporting Cross-Sector Partnerships
- Workforce

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. If your organization is seeking to qualify as a TA Vendor, please be sure to describe your experience and expertise specific to rural providers, justice-involved providers, Medi-Cal Tribal and Designee of Indian Health Program providers, maternal and child-serving providers, and/or transitional rent providers. (6000 characters limit)

Please briefly describe the experience and expertise that qualifies your organization to serve as a TA Vendor in this TA Domain. Please be sure to describe your experience and expertise specific to rural providers, justice-involved providers, Medi-Cal Tribal and Designee of Indian Health Program providers, maternal and child-serving providers, and/or transitional rent providers. (2000 characters max)

Please provide two references that can speak to your organization's qualifications to provide TA in this TA Domain that include:

- Organization Name
- First Name
- Last Name
- Title
- Phone Number
- Email

Add TA Domain Staff

Please identify the staff members who will serve as key personnel for projects in this TA Domain including:

- First Name
- Last Name
- Provide a brief bio of the identified staff member. (2000 characters limit)

Section 5: Submit

Please review the terms and conditions, then sign and submit the TA Vendor Application.

The Applicant, through its authorized representative, attests as follows and agrees to the following conditions:

- The funding received through the TA Marketplace initiative will not duplicate or supplant reimbursement received through other programs/initiatives.
- The Applicant will submit progress reports on TA Marketplace funding and progress updates on engagements with TA Marketplace users in a manner and on a timeframe specified by the TPA and/or DHCS.
- The Applicant will respond to general inquiries from the TPA and/or DHCS pertaining to the TA Marketplace initiative within one business day of receipt, and provide requested information within five business days, unless an alternate timeline is approved or determined necessary by the TPA and/or DHCS.
- The Applicant understands the TPA and/or DHCS may suspend or terminate the Applicant's TA Marketplace funding if corrective action has been imposed and persistent poor performance continues. Should funding be terminated, the TPA and/or DHCS shall provide notice to the Applicant and request a close-out plan due to the state within 30 calendar days, unless significant harm to members is occurring, in which case the TPA and/or DHCS may request a close-out plan within 10 business days.

By signing, I hereby confirm as the authorized representative of the Applicant that all information provided in this application is accurate, truthful, and reflects the details to the best of my knowledge.

Please enter the authorized representative's full name. *Please note this will be considered the signature for the authorized representative.*

Appendix A. TA Domains

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