



# **Request for Proposal**

## **Peer Support Specialist**

### **Certification- Exam Development**

**Applications due by 5:00pm on Friday, November 5, 2021**



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## 1 RFP Summary

The California Mental Health Services Authority (CalMHSA), a Joint Powers Authority (JPA), serves California Counties and Cities as an independent administrative and fiscal intergovernmental structure for jointly developing, funding, and implementing mental health services and educational programs at the state, regional, and local levels. (See Gov. Code §6500 et seq.).

This Request for Proposal is issued for the purpose soliciting responses for interested entities with the experience and capacity for using innovative strategies/ideas to provide the development of exams to be used to certify individuals seeking certification through the Peer Support Specialist Certification (PSSC) program. This request does not commit CalMHSA to contract for any supply or service whatsoever. In addition, responders are advised that CalMHSA will not pay for any information or administrative costs incurred in response to this RFI/RFP; all costs associated with responding to this RFI/RFP will be solely at the interested party's expense. Not responding to this RFI/RFP does not preclude participation in any future RFP, if any is issued.

The California Mental Health Services Authority (CalMHSA) is representing counties in the implementation of a Peer Support Specialist Certification (PSSC). Counties range in size from small/rural to large counties located throughout California. The RFP's reference to Peer Support Specialist Certification (PSSC) is in alignment with the *Peer Support Specialist Certification Program Act of 2020* which has the intent of increasing the number of Medi-Cal providers who are certified Peer Support Specialists. The Peer Support Specialist Certification standards have been established by the Department of Healthcare Services (DHCS) for all counties and/or organizations implementing a PSSC program. The California Mental Health Services Authority will implement a peer support specialist certification program. CalMHSA is interested in the development of five separate exams to be used to certify individuals based on five certification types with distinct areas of focus. The following are the five certification types:

- 1) Peer Support Specialist
- 2) Parent, Caregiver, Family Member Peer
- 3) Service Provider for people needing crisis support ("Peer Specialization-Crisis")
- 4) Service Provider for people who are unhoused ("Peer Specialization-Unhoused")
- 5) Service Provider for people with involvement in the justice system ("Peer Specialization- Justice Involved")



## Background Information

Senate Bill 803 (SB 803): Peer Support Specialist Certification Program, authorized the Department of Health Care Services (DHCS) to seek federal approvals to add peer support specialists as a Medi-Cal provider type and peer support services as a distinct service type in counties opting to participate in a peer certification program. SB 803 also directed DHCS to develop state standards for this program. Those eligible for the Peer Support Specialist Certification (PSSC) are an “individual who is 18 years of age or older, who has self-identified as having lived experience with the process of recovery from mental illness, substance use disorder, or both, either as a consumer of these services or as the parent or family member of the consumer” (SB803, Article 1.4, section 14045.12(g)). Peer Support Specialists may serve in an array of behavioral health settings providing “culturally competent services that promote engagement, socialization, recovery, self-sufficiency, self-advocacy, development of natural supports, and identification of strengths” (SB 803, Article 1.4, section 14045.12(h)).

The intent of SB 803 is that the PSSC program achieve all the following (section 14045.11(a-g)):

- a) Support the ongoing provision of services for individuals experiencing mental health care needs, substance use disorder needs, or both, by certified peer support specialists
- b) Support coaching, linkage, and skill building of individuals with mental health needs, substance use disorder needs, or both, and to families or significant support persons
- c) Increase family support by building on the strengths of families and helping them achieve a better understanding of mental illness to help individuals achieve desired outcomes
- d) Support collaboration with others providing care or support to the individual or family
- e) Assist parents, families, and individuals with developing coping mechanisms and problem-solving skills in order to help individuals achieve desired outcomes
- f) Promote skill building for individuals in the areas of socialization, recovery, self-sufficiency, self-advocacy, development of natural supports, and maintenance of skills learned in other support services
- g) Encourage employment under the peer support specialist certification to reflect the culture, ethnicity, sexual orientation, gender identity, mental health service experiences, and substance use disorder experiences of the individuals the peer support specialist serves

To this end, DHCS used multiple methods for gathering input to establish the statewide requirements for Medi-Cal Peer Support Specialist Certification. The information from the analyses was used to establish the Medi-Cal Peer Support Specialist Certification Program standards. DHCS released guidance for the PSSC program implementation through the State of California- Health and Human Services Agency, Department of Health Care Services [Behavioral Health Information Notice No: 21-041](#) (BHIN 21-041). The BHHIN 21-041 outlines standards for implementation, including core competencies that shall be met through the training curriculum. The following sections describe the details of the proposed development project.



## 2 Project Scope of Work

The California Mental Health Services Authority (CaIMHSA) is seeking qualified vendors with the expertise and capacity to provide exam development services. The qualified vendor(s) will analyze the Peer Support Specialist required areas of competency and overall job duties and develop an examination to test for competency using material and resources provided by CaIMHSA, including a list of subject matter experts (SME). The provider will recommend their process and approach for using such material and resources to develop the exam. The exam is expected to be stored digitally and delivered to candidates through a computer-based testing platform.

The vendor may submit a proposal individually or as part of a collaborative effort with other entities, including entities to host and administer the exams. The selection process will consider the merits of the proposed approaches, the qualifications of the organization(s), the offered resources, the proposed timeline and the life cycle costs. CaIMHSA will reserve the right to select one or more providers if deemed the best option.

The Department of Health Care Services (DHCS) has identified the following core competencies outlining the training curriculum:

1. The concepts of hope, recovery, and wellness.
2. The role of advocacy.
3. The role of consumers and family members.
4. Psychiatric rehabilitation skills and service delivery, and addiction recovery principles, including defined practices.
5. Cultural and structural competence trainings.
6. Trauma-informed care.
7. Group facilitation skills.
8. Self-awareness and self-care.
9. Co-occurring disorders of mental health and substance use.
10. Conflict resolution.
11. Professional boundaries and ethics.



12. Preparation for employment opportunities, including study and test-taking skills, application, and résumé preparation, interviewing, and other potential requirements for employment.
13. Safety and crisis planning.
14. Navigation of and referral to, other services
15. Documentation skills and standards
16. Confidentiality
17. Digital literacy

### **Scope of Work**

- a. Required duties to be performed by provider:
  - i. Development of the following exams:
    1. Peer Support Specialist Certification
    2. Peer Specialization- Parent, Caregiver, Family Member Peer
    3. Peer Specialization- For people who are unhoused
    4. Peer Specialization- For people who are needing crisis support
    5. Peer Specialization- For people with involvement in the justice system
      - i. Reflect the content domains and weightings provided by SMEs
      - ii. Include a cut-score derived from an industry-regarded method
      - iii. Provide sufficient questions for each domain, as well as 20% additional relevant questions for exam variation
  - ii. Utilize provided source materials to develop valid and reliable test items that measure each content domain described in BHIN 21-041 (dated July 22, 2021).
  - iii. Collaborate, coordinate, and document working sessions and interviews with provided Subject Matter Experts (SMEs) to develop valid and reliable test items that measure each content domain, including documenting the outreach and scheduling processes.
  - iv. Use provider's preferred, recommended, or proprietary digital item bank to author test items.
  - v. Identify final test items, citations to any reference document(s) and/or sourced SMEs name(s), item notes, etc. in provider's preferred, recommended, or proprietary digital item bank.
  - vi. Provide a final version of the test that can be exported from provider's preferred, recommended, or proprietary digital item bank in CSV or comparable format.



- b. Methods for item development:
  - i. Conduct item writing workshop with Subject Matter Experts (SMEs) identified by CaIMHSA
  - ii. Coordinate SMEs to write items
  - iii. Review, revise, and accept SME-sourced items
- c. Exam and testing authoring tools and/or software must meet accessibility standards.
- d. Provided by CaIMHSA:
  - i. Access to list of contact information for pre-selected, approved, & committed SMEs (to be provided upon contract execution)
  - ii. State of California- Health and Human Services Agency, Department of Health Care Services (DHCS), [Behavioral Health Information Notice No. 21-041](#) (dated July 22, 2021).
  - iii. SAMHSA- [Peer Support](#) and [Peer Supporting Recovery](#)
  - iv. SAMHSA- [Family, Parent, and Caregiver Peer Support in Behavioral Health](#)
  - v. SAMHSA- [Peer Supporting Recovery from Substance Use Disorder](#)
  - vi. SAMHSA- [Core Competencies](#)

### 3 Requested Information

The following response components are required for each Scope of Work. CaIMHSA is not responsible for costs associated with the development of proposals nor shipping or delivery of such.

The following information is to be submitted as part of the proposal:

- 1. Overview
  - a. Provide an overview of your company's history and background.
- 2. Schedule/Timeline
  - a. Provide estimated hours per task, work phases/sequencing, and ability to deliver Peer Support Specialist exam and Parent, Caregiver, Family Member Peer exam by or before **May 1, 2022**.
  - b. Provide estimated hours per task, work phases/sequencing, and ability to deliver Peer Specialization- Crisis; Peer Specialization- Unhoused; Peer Specialization- Justice Involved exams by or before **September 15, 2022**.
- 3. Method/Approach/Process
  - a. Describe in detail your project workflow and project management team structure.
  - b. Describe your approach to the scope of work to be performed, and any special concepts, techniques or recommendations that will lead to a successful launch and beyond. This should demonstrate provider's understanding of exam development, setting cut scores, assembling exam forms, general psychometrics, item development, cultural considerations in item development, validation, and reliability.



- c. Provide detailed information on exam platform accessibility authoring tools and software, including examples of accessibility features offered through these tools.
4. Statement of Qualifications
  - a. Describe your entity and staff's qualifications and expertise for the services being requested. Cite any specific certifications or accreditations. Include a description of key personnel who will be assigned to this project, including their resume/CV.
5. Budget/Cost – The selected Provider will be entering into a deliverable based contract with CaIMHSA. Therefore, please submit a budget based on payment for deliverables completed to include a timeline for the completion of deliverables. For entities submitting a proposal which includes subcontractors (collaboration with other entities) please ensure deliverables are inclusive of all costs. CaIMHSA will have no influence over subcontractors, therefore it will be the Providers responsibility to manage all subcontractors and hold them to the same provisions they are being held to, under CaIMHSA's contract.

Please submit the following components as part of your response (7 pages Maximum):

1. Background of organization
  - a. Past experience working with County/City Mental/Behavioral Health Departments and/or behavioral health organizations or initiatives.
  - b. Provide examples of prior work that is similar in scope and complexity to the items outlined in this Scope of Work.
  - c. Must provide the above information for prime contractors as well as any sub-contractors.

## 4 Agreement Terms

The Agreement is subject to fund availability. If it is determined funds are no longer available, the Agreement may be terminated without cause or penalties.

The Agreement is intended to commence on December 1, 2021, or upon CaIMHSA approval.

The resulting Agreement will not take effect until fully executed by all parties and all insurance requirements have been met.

The Agreement term may change if CaIMHSA makes an award earlier or later than expected, or if CaIMHSA cannot execute the Agreement due to unforeseen delays.

## 5 Minimum Requirements

Proposer must meet the requirements below otherwise may be considered non-responsive and the proposal may be rejected, at the CaIMHSA's sole discretion.





- 5.1. Proposer(s) must have a minimum of five (5) years of experience in the development and implementation of Peer Certification services being requested.
- 5.2. Proposer(s) must submit the required Letter of Intent by the date specified below:
- 5.3. Proposer(s) must comply with the RFP format and requirements set forth item 6.9 below.
- 5.4. Proposer must submit three (3) signed letters of support, including references from organizations with whom Proposer has contractual or other business relationships who can substantiate Proposer's capacity to provide such services as described in the Statement of Work (SOW).
- 5.5. Proposer must not currently have a Settlement Agreement or Claim against them with any of CalMHSA's member counties or any state agency. If there are current claims against the proposer in excess of \$10,000 within the last five (5) years, Proposer must disclose claims information as part of their proposal submittal.
- 5.6. Financial Information: Proposer is required to submit copies of Proposer's most recent audited financial statements.

## 6 Previous Experience

Please submit the following components related to your organizations background as part of your response (7 pages Maximum):

- 6.1 Past experience working with County/City Mental/Behavioral Health Departments and/or behavioral health organizations or initiatives.
- 6.2 Provide examples of prior work that is similar in scope and complexity to the items outlined in this Scope of Work.
- 6.3 Must provide the above information for prime contractors as well as any sub-contractors.

## 7 CalMHSA Rights and Responsibilities

- 4.1 CalMHSA is not responsible for representations made by any of its officers or employees prior to the execution of the Agreement unless such understanding or representation is included in this RFP or any written addenda to this RFP.
- 4.2 CalMHSA has the right to amend the RFP by written addendum. CalMHSA is responsible only for that which is expressly stated in the solicitation document and any authorized written addendum thereto. Such addendum shall be made available to each person or organization which CalMHSA records indicate has received this RFP. Should such addendum require additional



information not previously requested, failure to address the requirements of such addendum may result in the Proposal Package not being considered, as determined in the sole discretion of CalMHSA. CalMHSA is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf.

## 8 CalMHSA Option to Reject Proposal Packages

CalMHSA, at its sole discretion, may reject any or all Proposal Packages submitted in response to this solicitation. CalMHSA shall not be liable for any cost incurred by a Proposer in connection with preparation and submittal of any Proposal Package.

## 9 Truth and Accuracy of Representatives

False, misleading, incomplete, or deceptively unresponsive statements in connection with a Proposal Package shall be sufficient cause for rejection of the Proposal Package. The evaluation and determination in this area shall be at CalMHSA's sole judgment and its judgment shall be final.

## 10 Submission Instructions and Requirements

### 10.1 Proposal Timeline

EVENT	Key Dates
RFP Issued	10/26/2021
RFP Questions Due	11/02/2021
RFP Questions Answered	11/4/2021
Deadline for Proposals to be Submitted	11/09/2021
Application Review	11/15/21 – 11/19/21



## 10.2 Submittal Address

All Submissions must be submitted electronically using CalMHSA's e-Procurement Portal, Bonfire:

<https://calmhsa.bonfirehub.com/>.

## 10.3 RFP Questions and Clarifications

All questions and requests must be submitted through CalMHSA's e-Procurement Portal at: <https://calmhsa.bonfirehub.com/>. The deadline to submit questions for this RFP is **November 5, 2021**. The FAQ responding to the questions will be posted on **November 2, 2021**, at <https://calmhsa.bonfirehub.com/> and on the CalMHSA website.

To ensure all parties have access to the same information at the same time, except as stated below, CalMHSA will NOT respond to questions as they are received and will not accept telephonic questions.

It is the sole responsibility of the proposer to refer to the FAQs, which will be posted on CalMHSA's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

If a Proposer is unable to submit questions via the Bonfire e-Procurement Portal, the Proposer must provide CalMHSA with an email justification at [info@calmhsa.org](mailto:info@calmhsa.org) outlining why the Proposer is unable to do so.

If a question relates to a proprietary/trade secrets aspect of a proposal and the question would expose proprietary information if disclosed to competitors, the proposer must mark the question as "CONFIDENTIAL." With the question, the proposer must submit a statement explaining why the question is sensitive. If CalMHSA concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered by email reply, and both the question and answer will be kept in confidence. If CalMHSA does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the vendor will be notified and asked whether the vendor would like the question to receive a public response or no response at all.

## 10.4 Withdraw

A proposer may withdraw or amend its proposal, but only before the Application Submittal Deadline, directly on CalMHSA's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

## 10.5 Review of Applications

CalMHSA will receive all applications and review for completeness and adherence to the RFP rules stated in this document. Following the initial review, all qualified applications will be reviewed and



scored by a review panel. The evaluation panel will conduct a fair and impartial evaluation of proposals received in response to this RFP.

The review panel is comprised of individuals with varied backgrounds, to include professional expertise, lived experience, personal knowledge, etc. Panelists' information will not be disclosed as a matter of confidentiality. CalMHSA is committed to ensuring the RFP review panel is representative of California's racial, ethnic, and cultural diversity.

## **10.6 Negotiations with Potential Proposers**

Selection will not be based exclusively on price. CalMHSA reserves the right to negotiate with proposers who, in the opinion of the review panel, have submitted the best proposal in an attempt to reach an agreement. If no agreement is reached, CalMHSA may negotiate with other proposers or may choose to extend the proposal period. CalMHSA also reserves the right to meet with vendors to gather additional information. Additional information may include, but is not limited to, a demonstration of skills described in the proposal.

## **10.7 Protest Procedures**

Protests must be received no later than five (5) business days after the Notice of Intent to Award is posted on the CalMHSA website. The sole bases for protest are that the award was (1) in violation of law, (2) in violation of the provisions of this RFP, or (3) in violation of CalMHSA's procurement process. All protests must be in writing and (1) state in detail each and every ground asserted for the protest, citing to the law, RFP provision, or particular provision of the procurement policy on which the protest is based; (2) explain why the error prevented the aggrieved organization from being awarded the contract; and (3) identify the remedy sought.

Written protests can be sent to the following:

Via Email:

[info@calmhsa.org](mailto:info@calmhsa.org)

Via Certified Mail:

CalMHSA  
Attn: Chief Administrative Officer  
PO Box 22967  
Sacramento, CA 95822

Within 14 days of receipt of any protest, CalMHSA's Executive Director will provide a written decision which shall be final upon transmission to the protesting party. If the Executive Director determines that the error identified by the protesting party has deprived that party from receiving the contract, the



Executive Director may act to rectify the error, including but not limited to cancellation of the RFP or proposed contract, correction or other revision of the awarded contract, termination of an improperly awarded contract, or affirmation of an existing contract if the discovered defect is immaterial or the Executive Director determines that affirmation is in the best interest of CalMHSA.

## **10.8 Notice Regarding Public Records Act Request**

CalMHSA is subject to the Ralph M. Brown Act and the California Public Records Act. All proposals received for this RFP are ultimately subject to public review; however, during the competitive bid process, all proposals will be kept confidential. Upon award and execution of contract by awardee(s), all proposals and supplemental information will be subject to public review, with the exception of those elements of a proposal which contain elements that are clearly marked as confidential or trade secrets. Any such designation should be accompanied by a brief explanation of the reason the information is non-public and protected from disclosure under California law. CalMHSA reserves the right to disregard such designations if they have been applied indiscriminately to non-protected information, and in no event shall CalMHSA, its agents, representatives, consultants, directors, or officers be liable to a responding party for the intentional or inadvertent disclosure of all or a portion of a proposal submitted under this RFP, regardless of whether it was marked as confidential or trade secret.

Although the California Public Records Act allows certain confidential or trade secret information to be protected from disclosure, CalMHSA may not be in a position to establish that the information submitted is protected. If CalMHSA receives a request for public disclosure of all or any portion of a proposal that has been designated as exempt from disclosure, CalMHSA will use reasonable efforts to notify the responding party of the request and give such party an opportunity to assert, at its own expense, a claimed exception under the California Public Records Act or other applicable law within the time period specified in the notice issued by CalMHSA and allowed under the California Public Records Act.

## **10.9 Format of Proposal**

Proposals must be submitted through CalMHSA's e-Procurement Portal at: <https://CalMHSA.bonfirehub.com/>. Submissions by other methods will not be accepted. Internet Explorer 11, Microsoft Edge, Google Chrome, or Mozilla Firefox. Javascript must be enabled.

Browser cookies must be enabled. Respondents should contact Bonfire at [Support@GoBonfire.com](mailto:Support@GoBonfire.com) for technical questions related to submissions or visit Bonfire's help forum at <https://bonfirehub.zendesk.com/hc>.

Submission materials should be prepared in the file formats listed under Requested Information for this opportunity in the Bonfire Portal. All PDFs documents must be formatted in Times New Roman, 12 pt. font, double spaced, unless otherwise indicated in the Requested Information. The maximum upload



file size is 1000 MB. Documents should not be embedded within uploaded files, as the embedded files will not be accessible or evaluated.