



**Request for Proposal**

**Peer Support Specialist**

**Certification- *A Landscape Analysis***

***of Specializations for Peer Work***

Applications due by 5:00 PM PST on Friday, December 10, 2021 via the  
[Bonfire Submission Portal](#)



## Table of Contents

<b>1</b>	<b><u>RFP SUMMARY</u></b> .....	<b>3</b>
<b>2</b>	<b><u>PROJECT SCOPE OF WORK</u></b> .....	<b>6</b>
<b>2.1</b>	<b>DELIVERABLES</b> .....	<b>6</b>
<b>3</b>	<b><u>REQUESTED INFORMATION</u></b> .....	<b>7</b>
<b>4</b>	<b><u>AGREEMENT TERMS</u></b> .....	<b>8</b>
<b>5</b>	<b><u>MINIMUM REQUIREMENTS</u></b> .....	<b>8</b>
<b>6</b>	<b><u>CALMHSA RIGHTS AND RESPONSIBILITIES</u></b> .....	<b>9</b>
<b>7</b>	<b><u>CALMHSA OPTION TO REJECT PROPOSAL PACKAGES</u></b> .....	<b>9</b>
<b>8</b>	<b><u>TRUTH AND ACCURACY OF REPRESENTATIVES</u></b> .....	<b>9</b>
<b>9</b>	<b><u>SUBMISSION INSTRUCTIONS AND REQUIREMENTS</u></b> .....	<b>10</b>
<b>9.1</b>	<b>PROPOSAL TIMELINE</b> .....	<b>10</b>
<b>9.2</b>	<b>SUBMITTAL ADDRESS</b> .....	<b>10</b>
<b>9.3</b>	<b>RFP QUESTIONS AND CLARIFICATIONS</b> .....	<b>10</b>
<b>9.4</b>	<b>WITHDRAWAL</b> .....	<b>11</b>
<b>9.5</b>	<b>REVIEW OF APPLICATIONS</b> .....	<b>11</b>
<b>9.6</b>	<b>NEGOTIATIONS WITH POTENTIAL PROPOSERS</b> .....	<b>11</b>
<b>9.7</b>	<b>PROTEST PROCEDURES</b> .....	<b>12</b>
<b>9.8</b>	<b>NOTICE REGARDING PUBLIC RECORDS ACT REQUEST</b> .....	<b>12</b>
<b>9.9</b>	<b>PROPOSAL FORMAT</b> .....	<b>13</b>



## 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 of soliciting responses for interested entities with the experience and capacity for conducting a landscape analysis of Peer Support specializations under the Peer Support Specialist Certification program administered by CalMHSA. 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 RFP; all costs associated with responding to this RFP will be solely at the interested party's expense. Not responding to this RFP does not preclude participation in any future RFP submissions, if any is issued.

The California Mental Health Services Authority (CalMHSA) is representing counties in the implementation of a Peer Support Specialist Certification (PSSC) program. 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 is intended to increase 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. CalMHSA will develop, implement and administer a peer support specialist certification program on behalf of interested counties. CalMHSA is interested in understanding the landscape of competencies used by peer support training programs in the United States, including California, who are offering training for peer support workers working in areas of specialization in the mental health and substance use disorder service delivery system.

The CalMHSA peer certification program will offer the following certifications:

- 1) **Peer Support Specialist (non-specialist)**
- 2) **Peer Specialization** - Parent, Caregiver, Family Member Peer; Peer Provider support from the *caregiver* perspective
- 3) **Peer Specialization** - Crisis; Peer Provider for people needing crisis support
- 4) **Peer Specialization** – Unhoused; Peer Provider for people who are unhoused
- 5) **Peer Specialization** - Justice Involved; Peer Provider for people involved in the justice system



## 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 will achieve all the following outcomes (section 14045.11(a-g)):

- 1) Support the ongoing provision of services for individuals experiencing mental health care needs, substance use disorder needs, or both, by certified peer support specialists;
- 2) Support coaching, linkage, and skill building of individuals with mental health needs, substance use disorder needs, or both, to families or significant support persons;
- 3) 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;
- 4) Support collaboration with others providing care or support to the individual or family;
- 5) Assist parents, families, and individuals with developing coping mechanisms and problem-solving skills in order to help individuals achieve desired outcomes;
- 6) 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 and;
- 7) 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.

In alignment with SB 803, DHCS used multiple methods for gathering input to identify and establish program requirements to set statewide standards for the state-approved Medi-Cal Peer Support Specialist Certification. The information from the analyses were used to establish the Medi-Cal Peer Support Specialist Certification Program standards. The 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 BHIN 21-041 outlines standards for implementation, including core competencies that shall be met through the training curriculum for Peer Support Specialist.



The following list is an example of desired competencies identified by the DHCS for Certified Peer Support Specialists. These competencies are required for training under **non-specialist** peer certification.

- 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



## 2 Project Scope of Work

The California Mental Health Services Authority (CaIMHSA) is seeking qualified vendors with the expertise and capacity to conduct a landscape analysis of current training programs in the United States, including California, that offer training for peer support workers in the mental health and substance use disorder field who work in areas of specialization as defined under the RFP Summary. The landscape analysis should include the differentiation between trainings for individuals working with adults, children, and transitional-aged youth (TAY) and distinctions in the type of service delivery system.

Along with the identification of common competencies, the landscape analysis must also include a cross-map of the competencies across specializations. Finally, the analysis should include information on whether the training is a state-approved program, type of entity offering the training program (local, not-for-profit, private, or state government). Wherever possible, national competency standards should be denoted.

The landscape analysis is for, but not limited to, the following peer specializations:

- 1) **Peer Specialist - Parent, Caregiver, Family Member Peer**; Peer Provider support from the *caregiver* perspective
- 2) **Peer Specialist - Crisis**; Peer Provider for people needing crisis support
- 3) **Peer Specialist - Unhoused**; Peer Provider for people who are unhoused
- 4) **Peer Specialist - Justice Involved**; Peer Provider for people involved in the justice system
- 5) **Peer Specialist - Transitional Aged Youth**; Peer Provider supporting Transitional-Aged Youth (TAY)

The selection process will consider the merits of the proposed approaches, the qualifications of the organization(s), the resources offered, the proposed timeline, and the life-cycle costs. CaIMHSA reserves the right to select one or more providers if deemed the best option.

### 2.1 Deliverables

The expected duration for completion of deliverables is **30-calendar days from contract execution date**. **The anticipated due date for this proposal is December 10, 2021 via the [Bonfire Portal](#)**. The deliverables for this scope of work include, but not limited to the following:

- 1) **An executive** summary.
- 2) **Written report:**
  - a. An outline of the process and research behind this methodology;
  - b. Expected results of the landscape analysis;



- c. A weighted matrix or other evaluation mechanism to assess the strengths and weaknesses of the training curricula and;
- d. Recommendation based on the identified commonly used core competencies (listed under SECTION 1 RFP SUMMARY) for the given specialization noted in the scope of work.

### 3 Requested Information

The following response components are required for each Scope of Work. CalMHSA is not responsible for costs associated with the development of proposals nor shipping or delivery of such. **(Maximum 7 Pages)**

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.
  - b. Past experience working with County/City Mental/Behavioral Health Departments and/or behavioral health organizations or initiatives.
  - c. Provide examples of prior work that is similar in scope and complexity to the items outlined in this Scope of Work.
  - d. Must provide the above information for prime contractors as well as any sub-contractors.
2. Timeline
  - a. The expected duration for the completion of this scope of work is 30 calendar days. The deliverable due by or before **30 days from contract execution date.**
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.
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.
- 1) Budget/Cost –
  - a. The selected Provider will be entering into a deliverable-based contract with CalMHSA. Therefore, please submit a line-by-line budget and Budget Justification based on payment for deliverables completed.
  - b. For entities submitting a proposal which includes the use of subcontractors (collaboration with other entities), please ensure deliverables are inclusive of all costs. CalMHSA will have no influence over subcontractors, therefore it will be the Provider's responsibility to manage all subcontractors and hold them to the same provisions they are being held to, under CalMHSA's contract.



- c. CalMHSA does not have a set budget template required to be submitted with the Proposal.
- d. Budget and Budget Justification must be encompassed in the 7 Page Maximum Requirement.

## 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 **January 6, 2022**, or upon CalMHSA 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 CalMHSA makes an award earlier or later than expected, or if CalMHSA 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 CalMHSA's sole discretion.

- 5.1. Proposer(s) must have a minimum of three (3) years of direct experience in the development of landscape analyses.
- 5.2. Proposer(s) must comply with the RFP format and requirements set forth item 6 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 Letters of Support are not included in the 7 Page Maximum Proposal Requirement.**
- 5.5. Proposer must not currently have a Settlement Agreement or Claim against them with any of CalMHSA's member counties or any other 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 if selected to contract with CalMHSA.





## **6 CalMHSA Rights and Responsibilities**

6.1 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.

6.2 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.

## **7 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.

## **8 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.



## 9 Submission Instructions and Requirements

### 9.1 Proposal Timeline

EVENT	Key Dates
RFP Issued	November 17, 2021
RFP Questions Due via CaIMHSA's E-Procurement Portal.	November 26, 2021
RFP Questions Answered	November 30, 2021
Deadline for Proposals to be Submitted	December 10, 2021
Application Review	December 13-17 2021

### 9.2 Submittal Address

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

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

### 9.3 RFP Questions and Clarifications

All questions and requests must be submitted through CaIMHSA's e-Procurement Portal at: <https://calmhsa.bonfirehub.com/>. The deadline to submit questions for this RFP is **November 26, 2021**. The Frequently Asked Questions (FAQs) Document responding to all posed questions will be posted on **November 30 2021**, at <https://calmhsa.bonfirehub.com/> and on the [CaIMHSA website](#).

To ensure all parties have access to the same information at the same time, except as stated below, CaIMHSA 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 CaIMHSA'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.

#### **9.4 Withdrawal**

A proposer may withdraw or amend its proposal, but only before the Application Submittal Deadline of **December 10, 2021**, directly on CalMHSA's e-Procurement Portal at <https://calmhsa.bonfirehub.com/>.

#### **9.5 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.

#### **9.6 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.



## 9.7 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.

## 9.8 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, CalMHSAs may not be in a position to establish that the information submitted is protected. If CalMHSAs receives a request for public disclosure of all or any portion of a proposal that has been designated as exempt from disclosure, CalMHSAs 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 CalMHSAs and allowed under the California Public Records Act.

## 9.9 Proposal Format

Proposals must be submitted through CalMHSAs e-Procurement Portal at: <https://CalMHSAs.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 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.