# **DHCS Logo**

## **California Department of Health Care Services**

CalAIM PATH TA Marketplace Informational Webinar

**TA Marketplace Informational Webinar Transcript**

Table of Contents

[Introductions (slide 1) 2](#_Toc117184082)

[DHCS Reminders (slide 4) 2](#_Toc117184083)

[PATH Overview (slide 6) 2](#_Toc117184084)

[TA Marketplace Overview (slide 9) 3](#_Toc117184085)

[What Types of Entities are Eligible to Receive TA? (slide 11) 3](#_Toc117184086)

[What are the TA Domains? (slide 12) 3](#_Toc117184087)

[What TA Modalities does the TA Marketplace Support? (slide 13) 4](#_Toc117184088)

[How are TA projects initiated? (slide 14) 4](#_Toc117184089)

[Who qualifies to register as a TA Vendor? (slide 15) 5](#_Toc117184090)

[TA Vendor Application Process (slide 16) 5](#_Toc117184091)

[How is the TA Vendor application reviewed? (slide 19) 6](#_Toc117184092)

[When to Apply to Register as a TA Vendor? (slide 21) 7](#_Toc117184093)

[How to Submit a TA Vendor Application? (slide 22) 7](#_Toc117184094)

[TA Vendor Application Walkthrough (slide 23) 7](#_Toc117184095)

[Application Tips (slide 24) 9](#_Toc117184096)

[Key Questions (slide 32) 9](#_Toc117184097)

[Q&A (slide 40) 11](#_Toc117184098)

[Poll Questions & Conclusion (slides 41-44) 14](#_Toc117184099)

# Introductions (slide 1)

Dana Durham: Hi and welcome to the CalAIM PATH Technical Assistance Marketplace Webinar. This is about becoming a TA Vendor and informational session and we're really happy that you joined.

(Slide 2) Our goals for today are really just to provide you an overview of PATH and the Technical Assistance Marketplace, walk through the application to register to be a TA Vendor to the Technical Assistance Marketplace, respond to any questions you may have and then open the floor for additional potential questions.

(Slide 3) My name is Dana Durham. I'm the chief of the Managed Care Quality and Monitoring division at the Department of Health Care Services. I'm joined by Jillian Clayton, who's the chief of the Quality, Policy and Coordination section within DHCS. We also have from the Public Consulting Group, Megan Cox, Trish Perazzelli, Tara Murphy and Yingna Wang and really, really happy to have them all as they’re really technical experts in the Marketplace as we're moving through it.

# DHCS Reminders (slide 4)

So a few reminders we want to give you to start out now.

(Slide 5) We do have the public health emergency and we're heading towards soon towards unwinding. As the COVID-19 public health emergency ends, we want to make sure that Medi-Cal beneficiaries don't lose their coverage. And so our goal is to minimize beneficiary burden and promote continuity of coverage for our beneficiaries. And what so what we're asking you to do is to become a DHCS coverage ambassador. That will include downloading the outreach toolkit, which is on the website that's linked here. And also joining our mailing kit and as we get closer to the end of the public health emergency, we want to make sure that you just remind people that their addresses need to be up to date because we want to make sure that they get the appropriate information to continue to be enrolled in Medi-Cal, if it's appropriate. With that, I'm going to turn it over to Jillian Clayton, who's going to talk to us a little bit about PATH overall.

# PATH Overview (slide 6)

Jillian Clayton: Thank you, Dana, and hi, everybody.

(Slide 7) So first we'll talk about what is providing access and transforming health, otherwise known as PATH??

So PATH is a $1.44 billion program that's really looking to support the capacity and infrastructure needed to implement Enhanced Care Management (ECM) and Community Support under CalAIM and we are seeking an additional 410 million to support the implementation of pre-release services under PATH. And this funding is really to complement and enhance the CalAIM funding efforts and it's not really considered a primary source of funding, but as a supplement to developing the transition to CalAIM.

(Slide 8) So within PATH, there are several different initiatives and opportunities for funding. So you'll see all of those different initiatives highlighted here.

Our focus for today is the Technical Assistance Marketplace, but just wanted to give a nod to some of the other great opportunities for funding within PATH. So we have our Whole Person Care Mitigation Initiative for the Whole Person Care former Lead Entities, and we have our Justice Involved capacity building, and also the Collaborative Planning and Implementation initiative. And the CITED initiative, which is the capacity and infrastructure transition, expansion and development initiative. But for today, we're focusing on the Technical Assistance Marketplace.

And so just to give you a high level description of that, it's the technical assistance to providers, community-based organizations, county agencies, public hospitals, tribal partners and others, and our TA Vendor application is currently live and open to apply until November 4th.

# TA Marketplace Overview (slide 9)

So now we talk more in detail about the TA Marketplace.

(Slide 10) So what is this Technical Assistance Marketplace initiative under PATH?

So this will really enable entities that are providing or intend to provide Enhanced Care Management (ECM) or Community Supports the ability to access technical Assistance from an array of qualified TA Vendors. And the TA Vendors will be promoted via the virtual TA Marketplace and this will serve as a one-stop-shop environment where entities can access all the TA resources they need to get started to set up shop to provide ECM and Community Supports.

The TA Marketplace will be designed, launched and managed by our third party administrator Public Consulting Group and DHCS will provide oversight of the TA Marketplace. And just a little bit of detail on the how the agreement works with the Vendor. The approved TA Vendors will enter into a General Agreement with PCG. And that enables them to provide TA under the CalAIM PATH TA Marketplace.

Now just a side note here that the official TA Marketplace is scheduled to launch in January 2023, so in a few more months. But right now we are looking to solicit Vendors for the TA Marketplace and get all of those Vendor applications approved in order to launch on time. And funding will be available to support TA services under the CalAIM PATH Marketplace.

## What Types of Entities are Eligible to Receive TA? (slide 11)

What types of entities are eligible to receive TA?

The Recipients of TA may include counties, cities and local government agencies or public hospitals, ECM and Community Supports providers, community based organizations (CBOs), Medi-Cal Tribal and Designees of Indian Health Programs and others. And applicants must be actively contracted for the provision of Enhanced Care Management (ECM) or Community Supports, or have a signed attestation that they intend to contract to provide Enhanced Care Management (ECM) or community supports. And lastly, managed care plans are not eligible to receive TA support to the TA Marketplace.

## What are the TA Domains? (slide 12)

What are the TA Domains?

The TA Marketplace will offer TA in seven different Technical Assistance domain areas, and there is a more detailed description in the appendix of this slide deck, but I'll just go over the seven, just the overview of these descriptions.

So the first one is Building Data Capacity: Data Collection, Management, Sharing, and Use. There's also a Community Supports domain that's for Strengthening Services that Address the Social Drivers of Health. There is a domain for Engaging in and Navigating CalAIM through Medi-Cal Managed Care. There's also Enhanced Care Management (ECM): Strengthening Care for ECM “Populations of Focus,” also Promoting Health Equity and Supporting Cross-Sector Partnerships, as well as Workforce. And there's also a cross-cutting competency across these which is rural communities. The TA Marketplace will also include TA Vendors with expertise and experience specific to rural communities in all of these TA domain areas. To add one last thing. This note down here is pretty important; that the TA domains actually may be revised over the life of the TA Marketplace initiative. So as we see TA needs emerge and develop throughout the program, we may revise these or add more domains as needed.

## What TA Modalities does the TA Marketplace Support? (slide 13)

What TA modalities does the TA Marketplace support?

So the TA Marketplace will support “off-the-shelf” TA projects. These are ready to go to TA offerings, packaged for convenient efficient delivery. So these are more like standardized resources, trainings, program models or data tools, or best practices guides that are relevant in a variety of settings with little to no customization, so you can pretty much just access them, grab them right off the shelf.

And then there are “hands-on” TA projects and these are more customized projects that are tailored to the unique needs of the TA Recipient. And so these will require the Vendor and the Recipient to work together to develop a unique scope of work and a budget to describe all of the project details and deliverables for that TA need.

## How are TA projects initiated? (slide 14)

How are TA projects initiated?

This kind of goes through the flow from start to finish of a TA project. So we'll just quickly run through the flow here, we want to make sure we leave enough time for questions as well.

We'll start with the eligible entities shopping for TA Vendors to address the TA need on the Marketplace. And then once an entity has decided on a TA project and a TA Vendor, they will submit a “light touch” TA project application via the Marketplace for PCG and DHCS to consider and approve. Once that TA project application is approved, the TA Vendor and the eligible entity, or the TA Recipient, will work together to develop the scope of work and the budget for that TA project. And then PCG and DHCS will review all of those scope of works and budget, then approve those projects. Once DHCS approves the TA scope of work and the budget, it will be formalized as a task order to the TA Vendor’s General Agreement with PCG, so it'll be included in that General Agreement contract, and once the task order is finalized, the TA project may begin.

## Who qualifies to register as a TA Vendor? (slide 15)

Who qualifies to register as a TA Vendor?

If you're interested in becoming a TA Vendor, you must meet, at a minimum, the following criteria: Demonstrated subject matter expertise in one or more areas of the TA domains, Demonstrated experience and success providing TA to one or more of entity types eligible to receive TA, Maintain business licensing or accreditation that meet industry standards and maintain a physical presence in California or are capable of effectively providing TA services virtually. Also demonstrated cultural competency and non-discriminatory practices, Commitment to participate in any contractually required activities, such as training or onboarding, as required. The capability to comply with all reporting and oversight requirements and also provide excellent customer references

OK. And now we will walk through the TA Vendor application process. I think I will pass it to my colleague Tara from PCG.

# TA Vendor Application Process (slide 16)

Tara Murphy: Hi everyone, and thanks so much, Jillian. I'm glad to be with all of you here today. As Jillian said, I'm part of the PCG team that is helping to stand up the TA Marketplace.

(Slide 17) So, we wanted to just spend a little bit of time walking everybody through the TA Vendor application process. Starting at the highest level, organizations can apply to provide technical assistance in as few or as many of those seven TA domains as they believe are relevant based on their experience and expertise.

So, an organization can apply to provide TA in in one domain or in all seven or in any number in between. We really wanted to emphasize that applications to register as TA Vendor are non-competitive. Any organization that qualifies in at least one of those two domain areas will be able to contract with the third-party administrator, that’s PCG, to provide TA through the TA Marketplace. In terms of the TA Vendor application, it’s not a zero-sum game. If you are qualified, you are in.

Also, it is important to know the application for TA Vendors will reopen approximately every six months so new TA Vendors can be added over the life of the Technical Assistance initiative. This is not a one-time only opportunity. Every six months there will be the opportunity to throw your hat in the ring and apply to be a TA Vendor. This last piece is super important. Those organizations that are submitting a TA Vendor application now during this application round must be ready to provide technical assistance when the TA Marketplace opens in January 2023. If you feel like this is a good opportunity for your organization, but you don't quite have your ducks in a row to be able to hit the ground running come January 2023 it might be better to hold off until the next open application period, which is tentatively anticipated for March.

(Slide 18) Jumping down to sort of the next level of detail, thinking about the actual TA Vendor application. The application will require organizations applying to register TA Vendors to describe the following. The application asks about: organization’s familiarity with the CalAIM initiative, experience providing some sort of technical assistance to support CalAIM overall or some aspect of CalAIM, or experience providing TA support to a similar large scale Medicaid transformation restructuring initiative in another state. The main way that we are looking to get this information is through summaries of up to three ongoing or completed Technical Assistance projects that relate to CalAIM are required.

The application also includes some narrative questions that ask applicants about their experience in general with CalAIM or Medi-Cal and/or with similar large scale Medicaid initiatives in other states. For those of you who have been providing TA support to support CalAIM, we're really looking for summaries of up to three ongoing or completed TA projects. Also, critically important is experience and expertise in at least one of those seven TA domains. Again, the way that we're looking to assess experience and expertise specific to one or more TA domains is the provision of summaries of up to three ongoing or completed TA projects for each TA domain for which the organization is applying. If you're applying for one TA domain, that would be up to three TA projects for that one TA domain. If you're applying for all seven, we would want 3 times 7, so up to three ongoing or completed TA projects for each one of those TA domains that you're applying for. We're also requesting that references be provided for each TA domain that an organization is applying for.

Next bullet point. We are looking for descriptions for organizations that are applying to provide off-the-shelf TA projects. We're looking for descriptions of those off-the-shelf TA projects that you would want to provide as a TA Vendor. We are not looking for descriptions specifically of hands-on TA. Although, a narrative description of that capacity is helpful, and there's a space for that. If an organization is applying to qualify as a Vendor with expertise and experience related to rural communities, we want you to tell us about those experiences and expertise that qualifies you. Last but absolutely not least, we are looking for you to tell us about your organizational capacity to provide technical assistance that is both well managed and culturally competent.

## How is the TA Vendor application reviewed? (slide 19)

How is the TA Vendor application reviewed?

So all applications will be reviewed and scored during specified periods established by DHCS. So for this application round, we're really looking to do that scoring, mostly during the month of November. In terms of the process, the PATH third party administrator, which is PCG, will collect, review, and score applications according to DHCS approved criteria, and we'll make recommendations to DHCS as to the applicants that qualify to provide TA in each TA domain. Final authority for deciding, determining which applications are approved to provide TA in each domain rests with DHCS.

(Slide 20) Also, this is published in the Vendor application itself. The review criteria beyond the minimum eligibility criteria are as follows. It's out of 100 points, largest sort of volume of points goes to that capacity to provide high quality TA for Recipients in the relevant TA domain.

And so just to reemphasize. Each organization applying for multiple TA domains will submit questions in response to each TA domain separately. So again, if you're applying for one TA domain, you provide 1 set of answers. If you're applying to qualify in all 7 domains, that's those TA domain expertise questions times 7. We also are really prioritizing familiarity with CalAIM and Medi-Cal and experience providing TA to support the CalAIM initiative and/or similar large scale Medicaid transformation restructuring initiative in in another state, that gets 25 points.

And then obviously we're very concerned about TA Vendors having the ability to provide TA that is culturally competent and the capacity to provide TA that is sensitive and responsive to the circumstances of traditionally underserved or marginalized groups. As well as the capacity to ensure high quality, responsive management of TA projects, so TA projects that are well staffed, delivered on time, within budget, etc. Those last two categories get 17.5 points each to tally up to 100 points.

## When to Apply to Register as a TA Vendor? (slide 21)

As we said before, the 1st application period is open now. Applications are due November 4th, 2022. Applications will not be accepted outside this timeframe and the subsequent application periods will be posted to the TA Marketplace website when finalized. Again, we're expecting roughly every six months this application to reopen.

## How to Submit a TA Vendor Application? (slide 22)

How to get started submitting a TA Vendor Application?

So to start the process you would go to the TA Marketplace site on the [https://ca-path.com/ta-Marketplace](https://ca-path.com/ta-marketplace) website. You would click the TA Vendor application button, complete all the questions and required attestations, and there's also tips on how to apply in the Application Tips section of this slide deck and in an upcoming tip sheet. And I will now turn the slides over to my PCG colleague, Trish Perrazelli, who will do a quick walkthrough of the application itself. So thanks everyone.

# TA Vendor Application Walkthrough (slide 23)

Trish Perrazelli: Perfect. Thank you, Tara.

Am I sharing the right screen? Here we go. So just starting from where Tara just stated, on the [https://ca-path.com/ta-Marketplace](https://ca-path.com/ta-marketplace) webpage, there is a Vendor application button in the top right corner. If you would like to just review the application and what the elements are, I would recommend reviewing the PDF under additional information, but when you are ready to apply, you will click that Vendor application button, which will take you to our Vendor application.

So within the Vendor application, we have background on the PATH program. If you click on these arrows here, it will give you more information, instructions on how to submit and a reminder that these applications for this cycle are due on November 4th.

And then finally, the meat of the application. So what's required here is information on the entity that is applying. So the applicant organization tax ID and the contact person information. If you would like there to be more than one contact person on your application, you can click add an additional contact person. And that will give you another box to add additional contact information for your organization. Also in this demographic section, we'd like to know how many FTE are employed by your organization and whether your organization is a woman owned business, minority owned business or veteran owned business. So that is the demographic information from the application.

Moving on, we are requesting 1000 words about your organization, specifically related to your mission and experience. Now this may be shared on the public website, so this is a good chance to write a full description explaining your experience with TA for sharing with potential applicants for the TA.

The next tab here describes the applicant familiarity. So specifically, we'd like to know your experience in CalAIM and California’s Medicaid landscape and the types of TA Recipients that you're already serving, whether they be counties or CBOs, public hospitals, justice agencies or other provider types. If you're currently engaged in CalAIM or other related work at the county or regional level, you click yes, it will give you the option to describe that work and much the same if you click any of these buttons above, it will ask for further information.

So if you say you're serving counties, you can select the counties you are serving and describe those projects that you're delivering currently to counties. Lastly, this tab asks if you're providing TA to other large Medicaid restructuring or transformation initiatives in other States and if you say that you are, the application will ask you to identify the States and describe the TA provided and what kind of providers are currently receiving that TA, whether it be any of the types that are eligible to receive TA in California under this initiative. So that is the applicant familiarity.

The domains tab of this application. If you want a reminder on what each of the domains entails, you can click on these arrows to give you more information. There are also links to outside pages that give more information on the specific elements here.

So moving down into how you can fill this out. So you do not need to submit multiple applications for each domain. You can submit it all in one application, you just select the domains you are applying for. So let's say you were interested in Workforce and Supporting Cross Sector Partnerships, you would click both of those. And then below questions will populate for each of those domains. So for the supporting Cross Sector Partnerships domain, you'll be asked if the TA provided will be hands-on TA or off-the-shelf TA. There is an additional question for off-the-shelf TA that will populate if you click that link. You'll be asked about your organization and your experience specific to the domain. We're asking for summaries of TA you've provided within this domain and the identities of the staff members who will be serving as the key personnel, as well as references for that domain for previous work that you've provided that's similar. As I said, if you're providing the off-the-shelf projects, we're expecting that a file be uploaded that gives some context to the project's objectives, the cost, and the time needed to implement the project.

So there will be questions here for each of the domains that your organization selects. And you know, we expect that they all be completed. If your organization is applying to provide TA to rural communities, you'll indicate it here and then we expect that we'll be seeing that context and that experience with rural communities above in each of your answers for each of the domains you're applying for.

Our next tab is our capacity tab. So that's to understand your organization's ability to provide this TA from a capacity perspective. So what is your organization's practices with traditionally underrepresented or marginalized groups? What is your approach to ensuring high quality TA and what is your approach to sound fiscal management? We also have on this tab a question related to non-duplication or supplantation of payments, so where you may be providing this work already, we would like it described whether or not there's a conflict where there may be a risk of your organization providing TA that may already be funded elsewhere.

So those are the main areas of the application and only the last tab here is the attestation, which requires the name and signature of an authorized representative and just the date that the application is submitted so we can start moving it through the approval process. So that is the high level overview of the application and I believe going to pass it back to Yingna to do a poll.

# Application Tips (slide 24)

Yingna Wang: Actually, just want to really quickly run through the Application Tips for your reference when the slides will be posted.

Trish Perazzelli: Right, yes.

(Slide 25) Yingna Wang: Essentially, this section of Application Tips are just screenshots of the live walkthrough that we just went through. So this is just directing you to click the Vendor application button on the homepage. It'll take you to the Vendor application, which is the form we just ran through.

(Slide 26) And for your reference on the actual TA Marketplace website, there are PDF documents of the Vendor Application as well as the TA domains, so that if you are working with others in your organization, you can look through the questions in advance and you can plan your answers, although you also have the ability to go into the JotForm and save your answers if you choose to write your answers live there.

(Slide 27) You navigate through the application either through clicking the next button at the bottom or you can just click through the grey tabs at the top, which will take you to different sections of the application. You can navigate throughout the application until you hit submit.

(Slide 28) And you can edit a draft application and save one that's in progress by entering your information.

(Slide 29) And as mentioned before, you are able to apply for multiple TA domains as long as you check or indicate the domains you would like to apply for and each domain will bring up new questions asking for your expertise and experience in each domain.

(Slide 30) And then when you are ready to submit, you submit the application in the online form. And if you have any questions, please feel free to reach out to our team at the TA Marketplace e-mail.

(Slide 31) And this is a summary of what was just mentioned, all required fields will be labeled with an asterisk and you will not be able to submit the application until all the fields are populated. And please be sure to complete the TA domain section for each domain your organization would like to qualify for. And make sure that your contact information is up to date, since that will be what we'll be using to reach out to your organization. And please make sure that your application is finalized when submitted, because it cannot be revised once submitted. I'll kick it back to Jill.

# Key Questions (slide 32)

Jillian Clayton: Thanks Yingna. We'll go over some key questions that you may have while you're applying as a TA Vendor.

(Slide 33) **What happens after you apply to register as a TA Vendor?** This kind of shows an outline of the process of your registration form, so once your application is submitted, the point of contact in the TPA will receive a confirmation e-mail advising that the application has been submitted. Then application will be reviewed and evaluated by the TPA according to the DHCS criteria. After that, the TPA will provide DHCS with recommended applications for approval, and DHCS will make the final decision on approval of TA Vendors. Once all the approvals have been completed, the applicants will be notified of the decision via e-mail.

(Slide 34) **Can I revise my TA Vendor application after it is submitted?** So unfortunately, once your application is submitted, you won't be able to make any changes during the application period. However, if you decide you would like to apply to qualify in an additional TA domain once your application is submitted, you may submit a new application for that TA domain. If your application is denied, you will be notified of the reason for the decision, and you may apply again during the next application period.

(Slide 35) **Are there requirements for describing Off-the-Shelf TA projects?** Off-the-Shelf TA project descriptions included in the application should not exceed 250 words and should identify the project objectives, the price, and the time needed for the project. Descriptions of Off-the-Shelf TA projects that an applicant proposes to offer, via the Marketplace, should be prepared in Microsoft Word or a PDF and uploaded to the application as a separate document. There is no limit to the number of Off-the-Shelf projects that an applicant may propose to offer.

(Slide 36) **What is the timeline for the Marketplace?** So, as we mentioned, the Marketplace is expected to launch in January of 2023, all the way through 2027. The approved TA Vendors will execute contracts with PCG for the duration of the Marketplace. The expectation is that the contracts will be maintained unless there is demonstrated poor performance on the part of the Vendor, such that the Vendor will not need to submit a subsequent application to remain in the TA Marketplace from year to year. Vendors can apply to provide TA in additional domains during later application periods.

(Slide 37) **How much funding can I expect to receive as a TA Vendor?** The approval as a Vendor does not guarantee that a Vendor will receive funding through the Marketplace and that's because TA Vendors must be selected by an entity or you know, the TA Recipient, to provide the TA services in order to receive the funding. The TA Marketplace website will be the primary vehicle through which approved Vendors can market their services to potential Recipients. Each TA approved Vendor will have a dedicated Vendor profile that is displayed in each domain for which the Vendor has qualified. Off-the-Shelf TA project offerings will also be featured on the TA Marketplace website that's easily accessible for potential Recipients that are shopping for TA options. Also, additional opportunities for TA Vendors to promote their services to potential Recipients may be made available over the life of the PATH Technical Assistance Marketplace Initiative.

(Slide 38) **Is the annual funding available for the TA Marketplace allocated in any way?** DHCS has defined soft target allocations by county, and these target allocations encourage an equitable distribution of PATH funds for entities across the state. The targets by county are not fixed and they may be adjusted depending on the needs and other criteria and variables. The allocations were based on a variety of factors assessed at the county level, such as Medicaid enrollment, managed care plan revenue and measures of housing access.

(Slide 39**) If I'm having trouble completing my application, is Technical Assistance available?** The answer is yes, technical assistance is available if you need help applying or submitting applications online and so you can e-mail our third-party administrator at ta-marketplace@ca-path.com. E-mail is provided here and by phone as well, so if you need assistance, please use either of these venues please. I think I will pass it back to PCG. We'll walk through a Q&A.

# Q&A (slide 40)

Tara Murphy: That's great, Jill. Thank you. I can share some questions that we had received prior to the webinar and then if we get through those, we can turn it over to Anyjhia for some of the questions in the chat. So, the first question is what level of funding will be available to support TA projects through the CalAIM PATH Marketplace in the first year, so in 2023 and then over the life of the whole initiative?

Jillian Clayton: 100 million will be available to support TA projects in the first year. About 300 million is expected to be available over the life of the TA Marketplace initiative.

Tara Murphy: Great, that's a lot of TA dollars. So, I think you might have addressed this, but a question had come in previously: Will DHCS or the third-party administrator, PCG, provide opportunities for TA Vendors to market their services to potential TA Recipients or engage directly with those potential TA Recipients? Do you have an idea what those opportunities might be?

Dana Durham: I think at first, our goal is really to have each Vendor have a specific page on the website, that is dedicated to them that really can be used as a place to market in general. There will be other opportunities as we move further, but that's the initial approach that we're going to take, is to have web pages that are offshoots of the main TA Marketplace web page.

Tara Murphy: Got it. Thank you. That's helpful. Switching over to the off-the-shelf projects, the application guidelines state that each of those summaries that are required state that they must include a price, as well as the time, needed to implement the project. Can you provide some examples that might better clarify what you mean by price and time needed to implement?

Jillian Clayton: Yes, of course. So, some examples of that might be training for a CHW supervisor who might be priced at $20,000 for up to 25 participants and take two 6-hour days to implement. Another example could be a project to collect staff and provider feedback that might be priced at $10,000 to $25,000 and take 3-4 months to implement. A reducing re-admissions SPRINT might be priced at $50,000 for 12 coaching calls over 3 months. So, you can see it really varies with the price and timing depending on the scope of work.

Tara Murphy: Great. Another question: are potential TA Recipients able to be TA Vendors?

Dana Durham: That’s a good question. Yes and no. Yes, we're excited to have people who have experience being in the Marketplace as those who offer their expertise. However, at the same time, TA Vendors who are Recipients are not permitted to provide TA within their own organization through the Marketplace. So yes, we would love people who are Recipients of or working in the TA Marketplace to qualify as Vendors. However, at the same time, you cannot give the expertise to yourself or your own organization.

Tara Murphy: Excellent. We have a similar question, are MCPs able to be TA Vendors?

Dana Durham: Yeah, I mean, I think the answer is pretty much the same. If a managed care plan demonstrates that they really have the capacity to provide TA in one or more domains, they certainly can qualify as a TA Vendor.

Tara Murphy: OK great and this seems to be about sort of judging chances for success. The question is, if an organization provides just one single service under a single TA domain, would that organization be eligible to apply? Would they be viewed as competitive?

Jillian Clayton: Well, if your application demonstrates that the service your organization provides is high quality and potentially valuable to one or more types of TA Recipient, then your organization will qualify as a TA Vendor. Just to note, the TA Vendor application process is not competitive. Any organization that demonstrates the ability to provide high quality TA in one or more TA domains will qualify as a TA Vendor.

Tara Murphy: Great, excellent. Is there a limit on how many TA projects a Vendor may have as part of the TA Marketplace catalog?

Dana Durham: Go ahead, Jill, you got this one.

Jillian Clayton: I don't think there is a limit. I think if as long as it's qualified and appropriate, then that would be OK.

Dana Durham: We hope you can do all of them honestly.

Tara Murphy: We have another question about limits. How many TA Vendors are you planning to select through this application period? Both per domain and total? Do you have any upper limits on the number of TA Vendors that will be selected?

Dana Durham: I think currently there really are no limits and, you know, it somewhat depends on what we get and what the need is. I think that it's a good question, but until we kind of get to the application process, it's hard to know exactly what we need and what is out there to offer. Our goal is to have appropriate training for everything we need training for, so I don't think there'll be limits, but I also saw that in some things we've got a lot of interest. I also don't want to over promise. So right now, there are no limits, but I really hope we get a lot of you to participate because it is very important that we grow this.

Tara Murphy: I think there was actually a slide on this next question in the webinar. If I remember correctly, it was slide 14, but there's a question about outlining the steps included in the process from applying for TA project to TA project startup. Are there approvals needed from DHCS?

Jillian Clayton: Would it be helpful to walk through this one again or what do you guys prefer? We can walk through again? The TA Recipients will submit a brief TA project application that includes their preferred TA Vendor. Once DHCS and PCG have approved the TA project application, the Recipient and the Vendor will work together to develop that scope of work and budget. Once the TA scope of work and budget have been approved by DHCS, the scope of work and budget will be formalized as a task order amendment to the TA Recipient and Vendor’s general agreement with PCG. Once those task orders are finalized then that work can begin on the project; hopefully that's helpful.

Tara Murphy: Yeah, that's great. Most of the ones that I'm reading now came in before the webinar, but it might not hurt to hit some points again. There's another question that I know is in the webinar, which is what type of contract will Vendors have with PCG if they're accepted to the TA Marketplace? Will it be something like a Master Agreement? Is there an example or a template agreement to share with potential applicants at this point?

Dana Durham: It will be a General Agreement. They also have been referred to as Master Agreements, I’ve heard them called those. That’s the plan for the type of contract we are utilizing. We're in the process of drafting those contract documents, it'll be a little while before they're available, but they will be available. There will be plenty of time to review before they're expected to be executed and before the award goes out.

Tara Murphy: I think this last one on the list of questions raised prior to the webinar. We will restate this again. What type of contract will TA Vendors have with PCG for individual TA projects? For example, might it be firm, fixed price, time and materials, etc.?

Jillian Clayton: We are expecting the contracts to be either time and materials based not to exceed, or deliverables based.

Tara Murphy: Great, excellent. I'm scanning through the list. I think we've captured all questions that came in pre-webinar. I don't know if we wanted to turn to Anyjhia who has been monitoring the chat for incoming questions.

Anyjhia Wilkins: Hi, yes, I'm looking at the Q&A right now. So, we do have one question I think that we need to clarify. An attendee asked for clarification, it was assumed PATH was explicitly not for MCPs.

Dana Durham: Yes, that's true. PATH in general is not for the managed care plan. It really is for those who aren't in managed care. We could potentially envision a scenario in which, for whatever reason, the managed care plan might be best situated for TA project. I will note that the goal is to have others provide that TA, but just do want to note that it is possible that a managed care plan could provide the TA, but they could not be a Recipient of the TA themselves. Thanks for that question, it’s good clarification to put out there.

Anyjhia Wilkins: OK, I have another question I think may be a great question. Another attendee asked, can two or more TA Vendors submit a joint application for a particular TA domain? If so, how?

Dana Durham: I don't think we would say no, but we would expect you to figure out how you submitted it together and would want a lead participant. We could evaluate that, but I don't think we would stop 2 entities from working together and/or that wouldn't stop the entities from applying separately as well. I think that's open as a conversation and would be open to seeing what that would look like. I think you would have to specify what exactly the TA was, how it fits into the needs we've identified, and how the organizations would work together in your submission to the TA Marketplace.

Anyjhia Wilkins: Alright, I have another attendee asking can Vendors specify the TA Recipients they like to be matched with? For example, specific types of Recipients like CBOs or within a certain region like a county?

Dana Durham: I mean, we'd be open to getting that as you applied. If we see some other opportunities, we might encourage you to take advantage of those opportunities. We really are interested in making sure that CBOs get some technical assistance that they don't have so that is a priority. We would very much be interested in where you think your expertise lies, but if we see some other possible applications, we might push you a little bit beyond that to see if we can leverage in different ways too. Jill, you might want to add something to that.

Jillian Clayton: I was going to say the same thing, Dana.

Anyjhia Wilkins: Alright, another question. To better gauge our capacity as a Vendor, can you provide an estimate of how many providers are expected to use the TA Marketplace? Are there specific domains that you project will be the highest in demand?

Dana Durham: You know, I think that one is a little hard to kind of land on an answer to. I think we have hopes about what would be highest in demand. I also think we need some technical training on various things. The reason that those domains are there is because we think they're all important and we think they're all needed. It’s hard to answer that question because we just don't know who will be applying or what the need will be in general. I wish I had that answer, but I don't. Anyone, please feel free to chime in if you have anything to add.

Jillian Clayton: No, I agree, Dana. We did think very carefully about the selected domains. We considered a lot of stakeholder feedback in creating these. So, we are expecting to see utilization of across all of them hopefully. It really depends on the entity requesting the TA and the area and the needs. So, it'll be interesting to see and monitor as the initiative progresses.

Anyjhia Wilkins: Alright, another question, is one county agency allowed to provide TA to a different county agency?

Dana Durham: I think we'd want to look at that a little carefully to make sure that you're not training yourself because that is something we've said is not allowed. We just must see the specific scenario. I'm not saying no, because you know that we can't contemplate every scenario, so we'd be open to seeing what that looks like.

Anyjhia Wilkins: Alright. I think that is all the time we have for the Q&A. If you have any more questions, you can contact the TA Marketplace team by e-mail. I will pass it back to Yingna.

# Poll Questions & Conclusion (slides 41-44)

(Slide 41) Dana Durham: If you could go to the end of the slides, that would be great. Sorry, I forgot about the poll questions. Go ahead Yingna.

Yingna Wang: Sorry, we have a couple of poll questions. Based on the webinar, please indicate how likely you are to apply to be a TA Vendor. Great. It looks like around 60% of participants say very likely and then around 20% each say likely and unsure. So that's good information for us to know.

Dana Durham: I'll just put a plug in there if you're likely or unsure if there's anything we can do to make you more likely. Let us know because we're looking forward to getting participation in this.

(Slide 42) Yingna Wang: The second poll is to pick all the domains which you are interested in applying to become TA Vendor for, if any. It looks like it's a pretty even split, it's hard to tell. There are a couple that have more respondents but it's good that there aren't any domains that don't have any, so this is useful information for us as well.

Dana Durham: That is great.

Yingna Wang: Take it away, Dana.

(Slide 43) Dana Durham: Thank you so much. I wanted to go before you, but I'm glad we did the poll questions because we really needed them. Thanks for taking the poll. It sounds like we're going to be able to meet a lot of the needs that are out there. As I said before, if we can make you more likely or you have any questions, please e-mail us. It is going to take a lot of people to build what we need to build and to get where we need to get. We want to make it successful. We thank you for attending this and really hope that you'll take advantage of asking any questions you may have. The two PATH websites are displayed here, and we'll be releasing other things in the future.

(Slide 44) Thank you so much for coming and we look forward to interacting with you more. Have a great day.

Jillian Clayton: Thank you.

Dana Durham: Bye.