



Request for Proposals
Report Author
Enhancing Statewide Training Infrastructure for Community Health Workers and Promotores
in California: A Stakeholder-Driven Initiative

Opportunity announced	February 24, 2020
Proposals due	April 2, 2020
Grant recipient announced	April 24, 2020
Project begins	May 11, 2020
Project ends	June 2022
Award	\$200,000

I. Summary

The California Health Care Foundation (CHCF) is an independent philanthropy dedicated to advancing measurable improvements in the health care delivery system for the people of California, particularly those with low incomes and those not well served by the status quo.

This request for proposals (RFP) is intended to identify a grantee that will develop and publish a report codifying a set of recommendations that have been agreed upon by a diverse group of stakeholders. These recommendations are intended to advance the California Future Health Workforce Commission (“Commission”) Community Health Worker / Promotores (CHW/Ps)¹ [recommendation \(PDF\)](#) to “scale the engagement of community health workers, promotores, and peer providers.” The stakeholder process is designed to develop a road map that could be used in the development of a system of state-endorsed CHW/P training programs.²

II. Project Goals

- California will have a detailed and actionable plan for state endorsement of CHW/P training programs.
- To produce a report, which will include recommendations for the development and implementation of a CHW/P training program defined and endorsed by a diverse stakeholder group, including CHW/P training and advocacy entities, health plans, and CHW/P employers.

III. Project Background

The CHW/P workforce offers unique expertise to a range of challenges faced by underserved patients in safety-net systems. Numerous studies demonstrate the effectiveness and cost

efficiency of CHW/Ps in improving health outcomes and addressing health disparities across populations and conditions.³ Adding CHW/Ps' knowledge of local community context, health equity, and health navigation to a health care service delivery network is associated with demonstrable improvements in health outcomes for individuals and communities.

Nationally, CHW/Ps fill diverse roles in a variety of settings. Their role is expanding as part of the health workforce and also more broadly to support primary prevention and public health. In the health care delivery system, increased accountability for health outcomes coupled with a recognition of the role of social determinants of health are further driving the integration of CHW/Ps into health teams.

Many believe the pace of CHW/P expansion in California has been slow compared to that of other states and that staffing remains overly reliant on grants and time-limited initiatives. Others in the state emphasize the need to go slow in order to carefully integrate CHW/Ps into the health care system's regulatory environment and financing streams without compromising the core elements of CHW/P effectiveness.

The goal of this project is to ease the pathway for integration of CHW/Ps into California's health care systems — for both employers and the workers themselves — with the ultimate goal of transforming health care systems and their capacity to advance health equity. This project focuses on CHW/Ps currently working in or interacting with California's health care systems, along with the anticipated demand for additional CHW/Ps in the state's provider network.

The project will engage with a stakeholder group, an advisory group, and subject matter experts (SMEs)⁴ to define an overarching structure and core competencies for a CHW/P training model in California. The model must be amenable to CHW/Ps working in diverse settings while diving more deeply into the components of the certification and curricula deemed central to the role of CHW/Ps working in or with the health care sector.

There are other critical elements of advancing the CHW/P workforce including, but not limited to, pipelines for the advancement and employment of CHW/Ps, greater incorporation of CHW/Ps into academic settings, and improving the capacity of employers to support and sustain CHW/Ps, which fall outside the scope of this project.

CHCF has selected a stakeholder engagement grantee⁵ to convene and coordinate a diverse group of California stakeholders and stakeholder organizations (CHW/Ps, CHW/P training programs, CHW/P advocacy organizations, CHW/P employers) to develop recommendations for a state-endorsed system of CHW/P training programs in California. The report author will work closely with the stakeholder engagement grantee, who is responsible for the following areas:

Project Health

Tracking and communicating progress (and any barriers) vis-à-vis project goals to promptly identify the need for and rapidly implement course corrections.

Project Management

Developing and monitoring a project work plan. The stakeholder engagement grantee will track report authors' deliverable deadlines to ensure alignment with overall project execution.

Financial Support Processes

Supporting or managing the financial support processes for the advisory group and stakeholder meetings.

Funder Meetings

Working with CHCF to plan and facilitate up to four funder meetings.

Communications

Developing and executing a communications plan, which will include methods for communicating with stakeholders across the state (stakeholder group participants and external stakeholders).

Stakeholder Engagement

This includes developing the architecture for the stakeholder engagement process, timing, and governance structures; collaborating with CHCF on the stakeholder and advisory group identification process; advisory and stakeholder group meeting planning and facilitation; and review of report to ensure its alignments with stakeholder and advisory group recommendations.

IV. Project Activities

The primary responsibilities of the report author as are follows:

1. Report author will work closely with the stakeholder engagement grantee to create and implement a stakeholder-driven process to endorse a set of recommendations.
 - a. Report author will be a thought partner in the design of the project architecture and in the identification of potential stakeholder and advisory group members.
 - i. This architecture will be the primary responsibility of the stakeholder engagement grantee. The report author will be responsible for providing feedback and input on the proposed project architecture and will share responsibility for designing a process that ensures that all members of the stakeholder group are supported to be active participants, directly and indirectly.

Activities: Conduct one or two formal rounds of feedback on project architecture.

- ii. The stakeholder selection process will be the primary responsibility of CHCF. The report author will work closely with the stakeholder engagement grantee and CHCF to identify potential stakeholders that represent the diversity of the CHW/P field, including training entities, employers, CHW/Ps, and others.

Activities: Develop a list of potential stakeholders based on criteria identified by CHCF and the stakeholder engagement grantee, including basic information on how those stakeholders align with the identified criteria.

- b. Report author will plan, develop, and deliver educational content to support the stakeholder group's learning and to advance project goals synchronized with the proposed project architecture, meeting facilitation plans, and proposed endorsement process.

- i. The stakeholder education process will be the primary responsibility of the report author. It is critical that group members make decisions based in a shared understanding of the CHW/P field and the surrounding evidence, policy, and practice in California and nationally.

This process will be developed in close consultation with the stakeholder engagement grantee to ensure that it is well coordinated with the planned stakeholder group meetings and that it is aligned with the goals set forth in the project architecture. It is likely that stakeholder education will be heavily front loaded.

The report author will be engaged in the identification of expert speakers for stakeholder meetings, in partnership with the stakeholder engagement grantee. The final agendas, logistics, and facilitation will be the responsibility of the stakeholder engagement grantee.

This process of education and support might include pre-meetings and preparatory sessions, webinars to provide background information for fuller participation at stakeholder meetings, pre-meeting assignments, etc. This process will require the report author to place reasonable and transparent expectations on stakeholder time.

Activities: Develop an educational plan that incorporates the modalities mentioned above; develop a schedule for webinar and in-person education that is synchronized with the stakeholder group schedule and has been developed in close consultation with the stakeholder engagement grantee; identify and engage SMEs who will participate in the stakeholder education process; coordinate SME preparation and planning sessions/calls, as necessary.

- c. Report author will, in partnership with the stakeholder engagement grantee, implement a stepwise approach to defining and endorsing key parameters for the development and implementation of a CHW/promotores training model. The proposed endorsement process will be included in the project architecture. The report author will play a key role in working with the stakeholder engagement grantee to carry out this process.

Activities: Develop a set of key decision points and considerations for group deliberation to inform the stakeholder engagement grantee's development of the stakeholder architecture; develop a draft report structure that draws upon publications that are currently being developed to inform this process as well as drawing on input from the stakeholder and advisory groups; identify subject matter-specific issues that require deliberation in core and subgroup stakeholder meetings; develop two draft reports (to be vetted by the advisory group) that synthesize recommendations made by and endorsed by the stakeholder group.

2. Create draft and final versions of the recommendations report.

- a. The report author will be responsible for developing a final report in close consultation with the stakeholder engagement grantee, the advisory group, and CHCF. This report will represent the deliberations and recommendations of the stakeholder group.

This report will provide the context, rationale (including any technical background, evidence, or precedent that underpins the recommendation), actions necessary to implement the recommendations, any policy implications (e.g., would there be a need for a change in California statute to implement the recommendations), and the estimated cost of implementation. Additionally, the report author will need to reference and summarize key findings from a set of reports being developed to inform this process.

The report author will work closely with the stakeholder engagement grantee and other grantees⁶ to carefully consider the timing, phasing, content, and audiences for this report to maximize the likelihood of successful implementation.

Activities: Develop a work plan for the development and publication of the report that is synchronized with the overall project work plan; update work plan progress in online project management software and alert stakeholder engagement grantee of any emerging barriers or delays with deliverables; work with stakeholder engagement grantee to ensure that the report content is reflective of the stakeholder recommendations; facilitate draft and final copy reviews by the stakeholder engagement grantee, CHCF, and the advisory group; develop report design with consultation from the stakeholder engagement grantee and CHCF;⁷ design, copyedit, and publish the report; collaborate with the strategic

communications grantee, the stakeholder engagement grantee, and CHCF to publish and disseminate the report, including presenting at up to two California-based conferences.

The anticipated components of the report are as follows:

- Core Recommendations
 - Recommendations for the overall structure and design of a state-endorsed training infrastructure
 - Agreed-upon core competencies for CHW/Ps, including specific competencies for CHW/Ps working in health care settings
 - Required curricular components of CHW/P training programs
 - Eligibility requirements for training programs
 - Implementation and oversight body or bodies
- Additional Recommendations and Considerations
 - Recommendations for training affordability and accessibility for CHW/Ps
 - Recommendations for building the capacity of existing training programs
 - Recommendations for financing the proposed infrastructure
 - Policy considerations for plan implementation (state and federal if applicable)
- Recommended Action Steps for Implementation

V. Timeline and Meetings

1. Meetings. Based on the project schedule and scope of work for the stakeholder engagement grantee, we anticipate that the report author will need to participate in:

Stakeholder or advisory group meetings: Between 10 and 17 meetings in California, with up to 12 in-person and up to 5 virtual. We anticipate three hours on average per meeting (in-person meetings are likely to be longer, and virtual meetings shorter).

Project team meetings: Approximately 75 meetings (predominantly virtual). If the report author (or members of the report author team) is local to the Bay Area, they may be asked to attend meetings in person more frequently.

CHCF meetings: Approximately one or two meetings per month with CHCF.

2. Timeline. An overarching project timeline has been established, and over the course of the report author selection process, more exact meeting dates may be identified. These will be communicated to applicants as they become available so that applicants can confirm their availability.

The current timeline and key milestones for the report author are as follows:

May 2020	Stakeholder education plan final; research begins.
July 2020	Report structure finalized; participate in one or more advisory group meetings.
August 2020	Report writing begins.

September 2020	Stakeholder group launch to include presentation of report structure and key decision points. Stakeholder education likely to occur September–October 2020. Stakeholder group meetings continue through March 2021.
February–March 2021	Present and refine draft training parameters and key elements of report.
June 2021	Present first draft of report.
September 2021	Present second draft of report.
November 2021	Final draft of report delivered to CHCF.
January 2022	Publication.
February–June 2022	Report dissemination.

VI. Budget

The proposed budget for this project is \$200,000. Applicants should include bids consistent with completing all work described in the activities section above.

VII. Proposal Packet

Include the following materials in the proposal packet:

1. Proposal cover sheet (available at <http://www.chcf.org/grantinfo/solicited>). This does not count toward the six-page limit.
2. Proposal narrative. The proposal narrative should be no more than six pages of text, single-spaced, in a 12-point font. Applicants are expected to honor the space limitations. The proposal narrative should describe:
 - a. Overall project approach (recommend two to three pages). We welcome unique approaches to this work that build on the strengths and capabilities of the applicant. Please address the approach you would take to the following components of the work:
 - i. Maintaining neutrality and collaborating equally with stakeholders and SMEs.
 - ii. Engaging and educating stakeholders.
 - iii. Soliciting, synthesizing, and operationalizing large amounts of stakeholder input.
 - iv. Writing reports intended for implementation by governmental organizations.
 - v. Coordinating and managing work plan within context of larger project
 - vi. Approach to collaboration, including coordinating and collaborating with other project consultants. Please include (especially if you have multiple people on your proposed team) how you would ensure that accountability and alignment is maintained.

- b. The challenges you see in this work and how to address them (recommend one-half to one page).
 - c. Your approach to collaboration. Specifically, how you would approach working with a consulting team that you have not worked with before (recommend one-half page).
 - d. The qualifications, capacities, and roles of your organization and/or team (recommend one page). Please address your experience designing, writing, publishing, and disseminating reports. Address your experience in the CHW/P space. Address your experience with and understanding of the California health policy landscape. Address your experience as it relates to curricular design and/or the policies and processes that can support and advance the recognition of professions (including your knowledge of national and state regulatory considerations). Please address your experience with complex projects and bringing together diverse perspectives to shared outcomes. If you are a team of people who are not organizationally affiliated, please briefly describe your experience working together.
3. Appendices. Appendices do not count toward the six-page limit.
- a. Bio-sketch or CV. Include a bio-sketch (no more than one-half page) for each key team member.
 - b. Budget form and budget narrative description. Please submit a detailed budget and budget narrative for the entire length of the project. Budget forms are available at <http://www.chcf.org/grantinfo/solicited/>.

How would you allocate the budget among your suggested project components? Specify major budget categories such as staff, travel, stakeholder meetings and education, report writing, editing and revisions, collaboration with partner consultants, and indirect costs.
 - c. Links to samples of related work or projects. Please include examples of reports, preferably reports/findings as outcomes of larger stakeholder input processes. Links are preferred, where available.
 - d. References. Please include the names, email addresses, and phone numbers of two references. Please provide a two- or three-sentence project description for each reference to provide context for their work with you.

VIII. Proposal Submission and Questions

Proposals must be delivered by email in one PDF or Microsoft Word file to Lauren Vandam, program associate (lvandam@chcf.org), no later than April 2, at 5 PM Pacific. Proposals will be acknowledged by a return email within 24 hours. Hard copies will not be accepted. CHCF will not provide individual critiques of proposals submitted.

Please send any questions to Melissa Schoen at melissa@mschoenconsulting.com. Responses will be posted and regularly updated on a FAQ page.

IX. Selection Criteria and Timeline

The selection committee will make its selection using the following criteria to assess proposals:

- The strength of the applicant’s narrative response including:
 - Approach
 - Challenges
 - Collaboration
 - Subject matter expertise
 - Ability to demonstrate and maintain neutrality
- Appropriateness of the proposed budget(s)
- Degree to which the individual (or team) reflects the diversity of the CHW/P community

The timeline for the proposal process is:

Activity	Timeline
RFP released	February 24, 2020
Full proposal due	April 2, 2020
Finalist interviews (anticipated)	April 16, 2020
Recipient announced	April 24, 2020
Project begins	May 11, 2020

¹The Amer. Public Health Assn. definition: A community health worker is a frontline public health worker who is a trusted member of and/or has an unusually close understanding of the community served. This trusting relationship enables the worker to serve as a liaison/link/intermediary between health/social services and the community to facilitate access to services and improve the quality and cultural competence of service delivery.

² Please note that this process has not been requested or endorsed by state officials. These recommendations may be used to suggest or advocate for a process that the state would implement. Additionally, this process is not intended to create new programs but rather to leverage and/or stimulate the expansion of existing training programs, as necessary.

³J. Nell Brownstein and Catlin Allen, Addressing Chronic Disease Through Community Health Workers: A Policy and Systems-Level Approach, 2nd ed., Centers for Disease Control and Prevention, April 2015, http://www.cdc.gov/dhdsp/docs/chw_brief.pdf (PDF).

⁴ The stakeholder group, advisory group, and SME identification process are still to be determined. The advisory group will likely be made up of a subset of the stakeholder group and SMEs.

⁵ The stakeholder engagement grantee will be announced in April. Applicant finalists will have the opportunity to meet and interview with the stakeholder engagement grantee during the selection process.

⁶ CHCF is likely to engage a strategic communications grantee.

⁷ Report will be branded to recognize the stakeholder group and key contributors to the project.