



**Mental Health Services
Oversight & Accountability Commission**

Fellowship Advisory Committee Teleconference Meeting Summary

Date: Tuesday, January 11, 2022 | Time: 1:00 p.m. – 4:00 p.m.

MHSOAC

**1325 J Street, Suite 1700
Sacramento, CA 95814**

****DRAFT****

AC Members:

Staff:

Other Attendees:

Khatera Tamplen, Chair Noah Abdenour Carol Kerr Lakita Long Shannon McCleerey-Hooper Larisa Owen Hector Ramirez Toni Robinson	Anna Naify Tom Orrock Maureen Reilly Brian Sala Cody Scott	Stacie Hiramoto Colleen Horton Cynthia Salas Ruth
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Committee Members absent: Lynna Do, Sally Mandujan

Agenda Item 1: Fellowship Advisory Committee Members Welcome and Introductions

Commissioner Khatera Tamplen, Committee Chair, called the meeting to order at 1:02 p.m. and welcomed everyone to the first meeting of the Fellowship Advisory Committee (AC).

Chair Tamplen asked for a moment of silence and reflection in honor of Tina Wooton, Commissioner and Chair Emeritus, who recently passed away. Commissioner Wooton was a fierce advocate for a peer support workforce and for recovery and wellness. Her passing will be a huge loss for the Commission and throughout the state.

Chair Tamplen stated the goal of the Fellowship AC is to provide expert feedback on developing a Mental Health Policy Fellowship at the Commission. Assembly Bill (AB) 1134 mandated that the Commission will have at least two fellows with different expertise. Named after respected mental health advocates in California, the Sally Zinman Consumer and Rusty Selix Mental Health Professional Fellows will apply their expertise and background to all aspects of the Commission’s work. At the same time, this Fellowship program will serve to bolster the Commission’s ties with the research community, mental health practitioners around the state, and the stakeholder community by bringing members of those communities into the Commission’s staff for a year.

Chair Tamplen stated the Committee will meet monthly to discuss topics such as recruitment and hiring, training and expertise, and areas of opportunities for the fellows. Recruitment of the first cohort of fellows is expected to begin in the summer of 2022 for a program launch in the fall of 2022.

Chair Tamplen reviewed the meeting agenda.

Cody Scott, MHSOAC staff, called the roll and confirmed the presence of a quorum.

Chair Tamplen asked everyone to introduce themselves. She reviewed the meeting protocols.

Agenda Item 2: Fellowship Program Vision and Opportunities

Chair Tamplen stated the Committee will hear about key opportunities for the fellowship program in advancing policy and practice for mental health practitioners and peers in California's mental health system. She asked staff to present this agenda item.

Anna Naify, Psy.D., MHSOAC Consulting Psychologist, provided an overview, with a slide presentation, of the negative outcomes that impact mental health, key areas that support transformation, key initiatives, challenges to address across the mental health system, building a fellowship program, opportunities, and role of the AC.

Discussion

AC Member Ramirez stated the Americans with Disabilities Act (ADA) is over 30 years old and yet most of the mental health programs funded throughout the state are inaccessible to individuals with disabilities. Similarly, they are inaccessible to Spanish-speaking communities. Also, the Commission should be representative of the majority of the residents of California. The Latino population has historically been left out by the Commission.

AC Member Ramirez stated the need for the AC goals to be more equitable to the current situations being faced by communities and looking at the most impacted and highly-marginalized communities of color. The Commission creates great initiatives but they do not benefit communities.

Agenda Item 3: Presentation – Strategies and Lessons Learned from Mental Health Fellowship Program in Texas

Presenters:

- Noah Abdenour, Certified Peer Specialist and Director, Peer and Recovery Services, Programs, Planning, and Policy, Texas Health and Human Services Commission
- Colleen Horton, Founder, Hogg Foundations Policy Fellowships and Academy

Chair Tamplen stated the Committee will hear strategies and lessons learned from a Mental Health Practitioner and Peer Specialist Policy Fellowship program in Texas. Presenters will discuss their experiences with recruitment and hiring, training and learning objectives, program structure, and opportunities for national mental health policy immersion experiences for fellows.

Colleen Horton, Founder, Hogg Foundations Policy Fellowships and Academy, provided an overview of the Hogg Foundation. The Hogg Foundation's internal Fellowship Program began 15 years ago. Policy Fellows were hired as full-time employees of the Hogg Foundation for two-year fellowships. Three years later, due to the success of the fellowship program, the Hogg Foundation began the Mental Health Policy Fellows Grant Program to fund mental health policy fellows in nonprofit organizations. At the same time, the Hogg Foundation developed the Mental Health Policy Academy for the fellows and their mentors to ensure that the fellowships were meaningful and that there was significant professional development throughout the fellowship.

Ms. Horton shared information about the fellowship program and academy, lessons learned, and recommendations:

Mental Health Policy Fellows Grant Program

- 5 Traditional Policy Grant Fellows were initially funded who were recent graduates of graduate schools in studies related to mental health policy work.
- 5 Peer Policy Grant Fellows were included later for a total of 10 policy fellowship grants.
- The grants include full-time salaries, benefits, a mentor stipend, a professional development stipend, and overhead to the nonprofit grantee organizations.
- The 10 fellows work within nonprofit organizations and participate collaboratively in the Mental Health Policy Academy. They work on issues together and learn from each other.
- Once they are brought together, there is no differentiation between traditional and peer fellows.
- One thing the Hogg Foundation looked at when selecting grantees was a fit of the organizations for hosting a mental health policy fellow.
- The grantee organizations provided the recruitment, hiring, and supervision of the fellows.

Mental Health Policy Academy

- The Academy was created to ensure a high level of professional development opportunities for the grantees and fellows.
- The Academy also provided extraordinary opportunities for networking within the advocacy community, the Legislature, and the administrative branches of state government.
- A requirement of the nonprofit grantee organizations was that both the fellows and their mentors participate in Academy activities.
- The Academy has proven beneficial to both the fellows and grantees because it provides a mutual learning experience. Many grantees were not mental health organizations but were interested in adding mental health policy work to their mission, vision, and strategic plans.

Lessons Learned

- The quality of the mentoring and supervision made available to the fellows is important, especially when adding individuals with lived experience or Peer Policy Fellows.

- The quality of the relationship between the fellow and their mentor can drive the success or the failure of the fellowship.
- Both the Hogg Fellows and Grantee Fellows focus on particular issue areas in mental health such as child welfare, criminal justice, juvenile justice, or school mental health or are hired to work in the general mental health policy arena.
- The two-year fellowships align with the biennial legislative cycle in Texas. This gives the fellows an opportunity to experience the full cycle of the policy process. After the year-long legislative process, the fellows then have another year to learn how legislative action is implemented into policy through the rulemaking process.
- Another lesson learned was that one-year fellowships can be difficult because almost as soon as the fellows are hired and begin to work, they must begin to think about their next job opportunity. Two-year fellowships give the fellows an opportunity to develop skills and some level of expertise in particular issue areas without the stress and pressure of immediately thinking about the need to look for their next job.
- By the end of a two-year fellowship, they begin to become recognized as an expert in particular policy areas, which enhances their marketability for their next employment opportunity.
- Another lesson learned is there is real value in having a cohort of fellows. Having a cohort of multiple fellows going through similar experiences and working in the same policy arena provides an opportunity for bonding, support, and collaboration. Mutual support and bonding have turned out to be great advantages of the grant program.
- With respect to recruitment and hiring of the fellows, the Hogg Foundation looked for evidence of passion for mental health and substance use policy, some level of policy experience (although not required), and strong communications and writing skills. The Hogg Foundation also looked for a strong desire and ability to gain the skills to do the work.
- There were applicants that applied for the fellowships that were overqualified. The fellowships are meant to be learning opportunities, not just two-year positions for individuals who already have the skills.
- It is important to infuse the voices of individuals with lived experience in the policy work. Peer Policy Fellows are needed.
- It is important to include peers in the conversations with the policy fellows so they learn to look at unintended consequences of policy recommendations and to ensure that the recommendations they were making would improve the lives of individuals with mental health needs.
- The benefit to the peer specialists is that it gave them the opportunity to see how policies that impact them were being developed. Including peers in the conversation creates good partnerships.

Recommendations

- There were great benefits to combining the traditional and peer programs but there were also considerations:
- Mentoring and supervision should be constant key considerations to ensure that the fellowship is a positive experience.
- Try to create some type of support cohort that could pull from internal staff or external partners with peer specialists.

Noah Abdenour, Certified Peer Specialist and Director, Peer and Recovery Services Programs, Planning, and Policy, Texas Health and Human Services Commission, provided an overview of the development of the peer fellow component to the Hogg Mental Health Policy Fellows Grant Program. He stated it became apparent that the expertise of individuals with lived experience and looking through a non-clinical, humanistic lens and perspective was absent at every layer of the different policy conversations and that that expertise was greatly needed. He stated he learned that he had expertise in what he, as a person with lived experience, had to offer that was not currently at the table. He offered the following observations:

Two Main Considerations

- Traditional and peer fellows should have equal roles and be compensated as such. Peer fellows cannot be considered as a second tier. Often, peers need to perform at higher levels, which is common for groups that are underrepresented.
- Consider how to preserve the peer perspective and not assimilate or coopt that voice so it ends up becoming homogenized into what is already there.

Additional Considerations

- Role clarity and a clear job description are important. The peer fellowship program is not peer support. It is a different type of work than providing a direct service and it requires different skills.
- Provide peer fellows with professional support for hard skills such as policy analyses and testimony.
- Connect peer fellows with other individuals with lived experience who are using that lived experience in the work they are doing, peer organizations, or individuals in leadership roles who are peer specialists. It is important to make those connections to provide social support to keep from feeling isolated if the peer fellow is the only one in an organization that is doing this work and to help preserve the non-clinical, peer perspective.
- Provide support for individuals who supervise peer specialists so they learn about common missteps. Two of the most important things for supervisors to understand is to completely separate wellness conversations from performance conversations and to only ask questions that would be asked of all employees.
- The peer fellow is not the first person in the organization who has lived experience. They just might be the first person who is open with it.
- Differentiate between mentorship and supervision. These should be two different persons or at least be a person with two distinct roles.

- Include opportunities to learn from subject matter experts and provide professional networking opportunities to help the fellows grow in their work.
- It is not the responsibility of the peer to teach everyone else about recovery and lived experience. Include an external expert on recovery who can teach the organization about what recovery is and other concepts for co-workers, supervisors, etc.

Discussion

AC Member Kerr asked where to start.

Ms. Horton stated the Hogg Foundation started with one fellow many years ago and has learned many lessons along the way:

- Pay attention to the role of the fellows. The traditional and peer fellows will be partners and need to be seen and treated as equals. One does not receive “easier” assignments or have more authority over the other.
- Ensure that the fellows have the necessary skillset and ability to do the work. The policy skills will be taught.
- Supervisors and mentors can be the same person but it is often better to separate the two roles. It is a safer relationship when mentorship is provided outside of supervision and it provides another person to share concerns and ideas with.
- Build a cohort of peers working in the policy arena or partnering with advocacy organizations. The value of a cohort is they become lifelong friends because they grow in this space together.

Mr. Abdenour added that too much support can also be problematic because the fellow will be going to external supports for possibly internal HR issues. It is important to have clarity about the lines between issues to be handled in a formal HR-type way versus things that an external source can provide support and guidance on.

Mr. Abdenour stated language is important. For example, traditional fellows are described as being on an academic path while peers are on an experiential path. The role is the same but the fellows come from two different paths and have different expertise, voices, and skillsets to bring to the table.

Mr. Abdenour stated it is also important to focus more on skills than one might think. For example, an individual may have great lived experience and an amazing story but not have the hard skills that are required for working inside of an agency. This may not be as evident if using a peer support credential as an access point. A fellowship program is not right for everyone. Peer Support Specialists are often people-oriented and may be better fit in direct-service work.

Ms. Horton stated a challenge the Hogg Foundation had to overcome when adding peers to the fellowship program was that peers sometimes thought they were hired to be a voice at the table and to tell their story. Although this is true, it sometimes conflicted with the grantees. Nonprofit organizations may have particular positions on policy issues that the peer that they hired does not necessarily agree with. The Hogg Foundation had to make it clear that the peer voice and experience is important in policy development and learning

but that the peer, as an employee of this organization, must carry the organization's message forward.

Mr. Abdenour agreed that an external advocate advocates in a different way than an internal employee. They are different roles that take different strategies for advocating. He stated the need to ensure that the organizations really want that peer voice. Sometimes organizations just want to check the box for having a person with lived experience but are not interested in hearing the peer voice perspective.

AC Member Ramirez asked if the Hogg Foundation partnered with the Association of University Centers on Disabilities (AUCD) as part of developing the fellowship program, and if the Foundation incorporated issues of diversity inclusion including accessibility from the outset.

Ms. Horton stated she was entrenched in the disability policy side prior to coming over to the mental health side. The Texas Council for Developmental Disabilities replicated the Hogg Foundation program and funded fellows in disability organizations. The Policy Academy was created to address important training issues and includes fellows funded through other organizations like the DD Council to participate in the Policy Academy. The Director of the Hogg Foundation is focused on equity, health disparities, and the issues of racism and they are a priority in the work of the Foundation. In-depth equity training is part of the Policy Academy that is ongoing.

AC Member McCleerey-Hooper asked if the high expectations held for persons joining the fellowship included the persons' ability to improve their diplomacy and about the amount of work done to help them improve when someone lacks diplomacy to understand the difference between internal and external advocacy.

Ms. Horton stated individuals were so passionate and came from the advocacy realm where they could say and do and present their opinions however and whenever they wanted to. They were very capable but at times it was difficult to stay quiet. It was more about learning to understand the professional requirements of working for an organization and not having that same freedom that was experienced as a mental health advocate or consumer.

AC Member McCleerey-Hooper asked if it is about learning about what diplomacy means to an organization and where that value is placed.

Mr. Abdenour stated it depends on the type of organization it is. A person may not agree with a legislative mandate, but that does not change what they can say as a public employee.

AC Member McCleerey-Hooper agreed but stated she was interested in the concept of a high expectation that was presented.

Mr. Abdenour stated, if a person is writing policy, they need to have good writing skills. If they are analyzing policy, they need to be able to digest the material in the way it is presented. The ability to accomplish the core components of the work should be vetted out during the recruitment process.

Expectations should be clear at the outset about the level of change the organization is comfortable with. One of the roles of a Peer Specialist is to be an agent of change. Peer Specialists should bring up issues and challenge processes. This should be vetted out front.

Ms. Horton stated it requires a lot of communication between the supervisor and the peer. Hopefully it is a trusting communication and a trusting relationship. The Hogg Foundation learned from experience that it is important to be clear that fellows need to work with their supervisors and need to have these conversations but that they are expected to perform as employees of that organization.

Discussion and Priorities

Chair Tamplen stated the Committee will discuss key areas of focus for the fellowship program, including but not limited to program goals, design, eligibility criteria for fellows, application process, and other opportunities. She stated staff has done research on other fellowship programs and compiled findings into a spreadsheet, which was included in the meeting materials and posted on the website called “Attributes of Fellowship Programs.” The spreadsheet is meant to help the Committee think through things like qualifications, recruitment and hiring, training, and advocacy opportunities for fellows.

AC Members provided feedback on the following questions for discussion:

1. What are key areas of opportunity for the mental health practitioner and peer specialist policy fellows to focus on?
 - The social determinants of health.
 - An equity approach looking at the most marginalized and impacted communities.
 - Leave self-directed areas open so things can be brought to the table that would otherwise not be realized.
2. What are important expertise, experiences, and education of fellows?
 - Do not only focus on individuals with doctorate degrees.
 - Do not only look for individuals with traditional education or training.
 - Recognize youth experiences and expertise.
 - Create a multi-tiered approach to make an established pipeline for peers that is also diverse. Age is also an important element in diversity.
 - Prioritize individuals who are bilingual/bicultural to help the greatest number of diverse communities. This is currently a huge barrier.
3. What are best practices to recruit diverse candidates?

No feedback was offered.

4. What are helpful screening tools to hiring fellows (writing samples, references, Q&A)?
 - The screening should be focused around defining passions for this type of work. Skillsets can be taught but the passion is what drives this type of work.

- Assess communication and writing skills – a writing sample is important.
- Include social media skills for advocacy as a type of writing sample not just the traditional type of academic writing sample.

5. What are training areas we should focus on?

- Training for provider care and what that looks like in terms of having a symposium for them, a continuum about how providers self-care, care for themselves in a different kind of way that includes rejuvenation. Frontline workers in house in organizations creating the culture of care in various places that provide mental health services.
- Training for overall systems change for providers of mental health services. This connection is missed because the systems have changed or are lagging behind. The reality versus where they need to be is not together.
- Training around world health changes to keep from becoming static and only focusing on mental health to be able to offer research, guidance, connection, monitoring, relevant evidence of educational attainment, etc.
- Training to ensure it is the voice of the individuals being served. Training around how to engage community, how to educate the community on the stakeholder process, how to build advocates out of community members, how to formally put on focus groups, and how to outreach to various populations that are being served, getting their feedback, and incorporating that feedback into policy change and policy management.
- Training for a participatory design process and participatory budgeting.

6. What are policy advocacy opportunities in mental health?

- Have a mental health 2.0 conversation with legislators so they understand the various factors that impact individuals with mental health conditions post-pandemic, especially youth. Because of the COVID-19 pandemic, individuals are struggling with new or increased mental health challenges that they do not understand. Having those brand-new conversations with legislators is important. There are outdated conceptions about what mental health conditions are and how to treat them.
- Have a voice in documentation reform. Having ways of presenting mental health challenges on paper or computer can be addressed from the consumer voice in a way that has never happened before. Include language on how to help others across the board in every aspect of this antiquated system, which still contains old ways of thinking. This is where the fellows can be effective in terms of policy change at the state level – implementation of CalAIM, the Medi-Cal billing side, the federal reimbursement, and how these things are spoken about on paper.
- The lived mental health experience and how someone walked through the system as a parent, as a consumer, as a child. It is important for someone to share what they encountered while learning to navigate the system.

7. What should the education requirement be for the practitioner fellow?

- Doctorate level is great but also consider master's-level applicants to provide the opportunity for different levels of specialization.
- It should be at least a master's level position, but be open to PhDs and PsyDs. It is important to get people who want to be engaged in doing front-line community-based work.

Ms. Horton stated the Hogg Foundation start out requiring a master's degree or law degree. She cautioned about requiring a PhD for fellowships because it moves away from real policy work and may end up with individuals who are policy researchers. There is a huge difference between individuals who do on-the-ground policy-changing systems work and policy researchers, who collect and analyze data and write papers. They think that presenting papers at conferences change systems, but it does not.

Public Comment

Cynthia Salas stated it is less about education and more about work experience, making the correlation between the needs of the community and the gaps in systems, and how to marry the two to provide protocols that would benefit both the agency and delivery services while dismantling systems that are in place as a result of poor policy. The speaker stated the need for policy language to be intentional in using anti-racist language to normalize the discussions around racial equity, especially when writing policies.

Mr. Abdenour agreed that leaving the door open to individuals who have less access to education, especially higher education, but who have the work experience to do this work and make a difference is important.

Ruth stated concern that counties are holding parent peers to the same standards as regular peers but parents have different experiences and navigation issues, especially parents of younger children.

Stacie Hiramoto, Director, Racial and Ethnic Mental Health Disparities Coalition (REMHDCO), suggested including the Sacramento State Center for California Studies Capital Fellows Programs in staff's Attributes of Fellowship Programs spreadsheet. The speaker stated they are concerned about diversity in hiring. There are not many individuals in upper management at the Commission who are individuals of color. It is important, particularly for the provider fellow, to be from a community of color or the LGBT community. Support for the fellows will be important. There must be provision for who will supervise and who will mentor, if it is a person of color. The speaker suggested looking at how this fellowship will differ from the administrative fellowships run by Sac State.

Wrap-Up and Adjourn

Chair Tamplen adjourned the meeting at 3:45 p.m.