Contracting to Provide Peer Services

August 20, 2025

Presenters

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Leadership Development Track:
Building Readiness for Contracting with Funders

The Leadership Development Track is a five-phased approach to support peer-run organizations to explore and develop readiness strategies and skills that lead to successful contracts with funders by providing a scaffolded learning pathway that includes:

Phase 1: Webinar	**Contracting to Provide Peer Services: Is Your Organization Ready?**
Phase 2:	Individual Contracting Readiness Assessment
Phase 3:	Interim Learning Community
Phase 4: Webinar 6	The Essentials for Contracting: Models, Contract Negotiation, and Compliance for Peer Organizations
Phase 5:	Individual Technical Assistance

Learning Objectives

- Understand the key components of organizational readiness for contracting with other organizations.

- Gain knowledge of process and tools to assess their peer-run organization's experience, infrastructure, capacity, and culture in relation to their readiness to engage in contracting.

- Learn how to build organizational capacity for contracting readiness.

- Learn strategies to build organizational readiness in these areas to enhance collaboration with other providers.

- Gain actionable tools and insights to strengthen their organization's ability to contract to deliver peer support services.

Peer Support in Integrated Settings

Peer supporters offer unique value within clinical teams

Promote recovery-oriented, person-centered care

Serve as bridges between individuals and providers

Model hope, resilience, and self-determination

Enhance engagement and reduce service drop-out

Advocate for trauma-informed, culturally responsive care

Discussion

What are your biggest challenges in building readiness for contracting?

- Staffing
- Documentation
- Infrastructure
- Culture
- Something Else

Understanding Organizational Readiness

Organizational readiness includes:

- A clear mission aligned with peer values
- A demonstrated history of service delivery
- Infrastructure to support contracts, billing, HR, and documentation
- Capacity to recruit, train, and supervise peer staff
- A culture that supports peer identity and cross-disciplinary collaboration

Impact of Readiness

- Experience
- Infrastructure
- Capacity
- Culture

Assessing Organizational Experience

Document your organization's history providing peer support

Highlight successes, innovations, and community impact

Identify gaps in clinical partnerships or service models

Communicate your organization's value proposition clearly to potential partners

Evaluating Readiness for New Partnerships

How to:

- Assess your experience with different service models.
- Adapt and communicate your organization's experience to potential provider partners.
- Build and present your organization's track record, including outcomes and success stories.

Building Organizational Infrastructure

Core components of infrastructure:

- HR: clear job descriptions, supervision models
- Technology: documentation, secure communication tools, outcome tracking
- Finance: billing systems, contracts, reporting
- Legal: policies, MOUs, confidentiality compliance
- Supervision: peer-aligned, role-appropriate models

Preparing Infrastructure for Scaling and Growth

- How to build or adapt infrastructure to accommodate expanding partnerships with clinical organizations.

- Examples of peer-run organizations that successfully scaled their infrastructure for contracting purposes.

Evaluating Organizational Capacity

Questions to consider:

- Do you have the bandwidth to add new sites or services?
- Can you train and support peer staff remotely?
- Is leadership equipped to manage new contracts?
- What funding and staffing will be needed to grow sustainably?

Developing the Capacity for Growth

- Strategies to build organizational capacity through workforce development, funding, and partnerships.

- Key training and development practices for peer support workers and organizational leaders to ensure capacity.

Workload Management and Resource Allocation

- Understanding the resource requirements of contracting and the need for balanced workload management.

- Assessing whether your organization has the capacity to support administrative duties and service delivery.

Strengthening Organizational Environment

A strong organizational environment includes:

- Role clarity and mutual respect between disciplines
- Open communication and co-learning
- Consistent peer voice in decision-making
- Ongoing supervision and reflective practice

Reflection: What environmental shifts would support stronger collaboration?

Change and Adaptation

- Identifying environmental barriers to collaboration with other providers.

- Techniques for overcoming barriers to change and promoting an open, adaptable environment.

- Examples of organizations that successfully navigated environmental shifts to collaborate effectively with other organizations.

Organizational Readiness Self-Assessment

Key assessment areas:

- Experience – Do we have a track record?
- Infrastructure – Do we have systems for contracts and billing?
- Capacity – Can we take on more work?
- Culture – Are we aligned for peer integration?

https://rightsandrecovery.org/wp-content/uploads/2025/08/PRO-Organizational-Self-Assessment-for-Contracting-2.xlsx

Interpreting Readiness Assessment Results

- 85-100% - Evaluate any domains below a 5 for internal improvement and attend the next webinar

- 70-84% - Utilize the Learning Collaborative to enhance readiness across the domains and attend the next webinar

- 50-69% - Seek individual TA in addition to the Learning Collaborative to enhance readiness and attend the next webinar

- Below 50% - Seek additional personalized support to enhance readiness before considering contracting

Next Steps

- Identify priority areas for development
- Seek additional resources

- Engage in training & TA

- Organizational Readiness Assessment
- Coaching Opportunities
- Learning Collaborative
- Webinar 2

Contracting to Provide
Peer Services:
Organizational Experience

August 27, 2025

Learning Objectives

- Assess and document history of peer service delivery

- Identify successes and lessons learned

- Develop strategies to communicate organizational experience

Why Experience Matters

- Demonstrates reliability and credibility to partners
- Builds trust with funders and providers
- Creates a foundation for scaling services

Discussion

What are your biggest challenges in building readiness for contracting?

Activity #1: Partner Case Studies

Breakout Rooms (10 minutes):

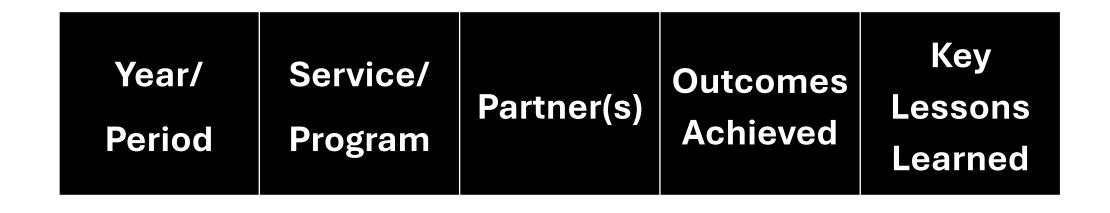Review an example of a successful partnership

Group reflection: What made these partnerships work?

How to Leverage Experience

- Document your organization's history of peer service delivery
- Highlight measurable outcomes (e.g. reduced hospital readmissions, improved engagement)
- Package success stories into clear narratives with data & testimonials
- Share lessons learned as evidence of adaptability and growth
- Present your track record to potential partners as proof of reliability
- Position your experience as a value-add in partnerships and contracts

Activity #2 – Experience Mapping

Chart your organization's experience in delivering key peer services using the template below:

Year/ Period	Service/ Program	Partner(s)	Outcomes Achieved	Key Lessons Learned

Success Story Drafting

- Clear Headline: Capture attention with a concise, descriptive title
- Context: Describe the challenge or need your organization addressed
- Actions Taken: Outline what peer services were provided and how
- Outcomes: Share measurable results and impact (e.g. data & testimonials)
- Lessons Learned: Highlight insights gained that demonstrate adaptability
- Relevance: Connect the story to funders' or partners' priorities
- Credibility: Use real quotes, client voices, or partner endorsements

Activity #3 – Success Story Workshop

Independent Activity (10 minutes):

- Draft a brief narrative of a successful service delivery that can be shared in 2 minutes or less.

- Include: service provided → outcomes achieved → lessons learned

Breakout Rooms (15 minutes):

- Share stories with group

- Provide feedback in the group

Key Takeaways

- Experience is your 'resume' for contracting
- Tell your story clearly and credibly
- Lessons learned = strengths, not weaknesses

Contracting to Provide Peer Services: Organizational Experience

August 27, 2025

Learning Objectives

- Identify essential components of infrastructure for contracting peer services

- Evaluate current infrastructure

- Develop strategies to strengthen administrative systems

Why Infrastructure Matters

- Strong infrastructure = Strong contracts = Sustainable peer services

- Contracts with partner organizations demand reliable systems

- Infrastructure builds trust, accountability, and scalability

Pillars of Infrastructure

- HR & Workforce Systems (e.g. policies, onboarding, credentialing)

- Finance & Billing (e.g. Medicaid readiness, invoicing, audits)

- Data & IT Systems (e.g. tracking outcomes, HIPAA compliance)

- Legal & Compliance (e.g. MOUs, risk management, contracting)

Contracting Readiness Scale

Foundational → Emerging → Ready to Scale

- Foundational: Manual processes, basic policies

- Emerging: Documented systems, partial compliance

- Ready to Scale: Integrated systems, contract-tested, audit ready

Where would you place your organization today?

Where would you place your organization today?

Discussion

What gaps exist in your current systems?

How could your infrastructure adapt for future growth?

Activity – Infrastructure Self-Assessment

Rate each pillar 1–5 (weak → strong)

- HR & Workforce Systems
- Finance & Billing
- Data & IT Systems
- Legal & Compliance

Identify top strength & top gap

https://rightsandrecovery.org/wp-content/uploads/2025/08/PRO-Organizational-Self-Assessment-for-Contracting-2.xlsx

Breakout Brainstorming: From Gaps to Solutions

Gap Identified	Solution/Idea	Resources Needed

What's one infrastructure gap I will address in the next 90 days?

Strategies for Strengthening Systems

- Adopt HRIS software for staff management

- Establish compliance calendar & contract review cycle

- Build HIPAA-compliant data dashboards

- Engage legal/financial pro bono partners

- Partner with clinical orgs for infrastructure mentoring

Key Takeaways

- Biggest strength identified
- Top gap
- First action step

Contracting to Provide Peer Services: Organizational Capacity

September 10, 2025

Session Overview

Focus: Building organizational capacity to manage contracts and deliver high-quality peer services.

Core areas:

- Workforce recruitment & training
- Supervision & leadership
- Administrative and service delivery capacity
- Resource allocation & workload management

Learning Objectives

By the end of this session, participants will be able to:

- Evaluate their organization's capacity to manage contracts and deliver services.
- Develop strategies for workforce recruitment, training, and supervision.
- Explore leadership roles in managing provider partnerships.
- Create a plan for resource allocation and workload management.

Instruction: Why Capacity Matters

- Contracts bring increased expectations and accountability.
- Adequate staffing, systems, and leadership are critical for sustainability.
- Strong organizational capacity ensures:
  - Service quality
  - Partner confidence
  - Growth opportunities

Does your organization have the capacity to manage the administrative burden of contracting?

Infrastructure vs. Capacity

Infrastructure is the foundation; **Capacity** is the fuel.

Infrastructure = the systems, structures, and tools that support contracting
- HR systems (hiring, payroll, benefits)
- Billing & compliance processes
- Data collection & reporting systems
- Policies, procedures, legal frameworks

Capacity = the people, skills, and resources available to deliver services
- Number of trained peer staff
- Supervisory and leadership roles
- Workload distribution and resource allocation
- Ability to scale services to meet contract demands

What is your current capacity for delivering peer services?

Workforce Recruitment & Training

- Identify pipelines for peer workforce recruitment.
- State Certification processes
- Create onboarding processes that are peer-centered.
- Ongoing training topics:
  - Ethics & boundaries
  - Trauma-informed practice
  - Documentation & compliance
- Retention strategies: peer salary, peer supervision, career ladders, recognition.

Discussion Question

- How can leadership best support capacity development?

Leadership in Partnerships

- Define leadership roles in external contracts.
- Build trust and communication with provider partners.
- Align peer values with clinical partnership expectations.
- Promote leadership succession planning for sustainability.

What challenges exist in recruiting, training, and supervising peer staff?

Activity: Solutions Brainstorming

Brainstorm in your groups solutions to capacity challenges related to recruiting, certifying, training, retaining, and supervising peer staff.

Challenges	Strategies/Solutions	Resources

Homework: Action Planning

- Draft a plan to increase capacity to recruit and train additional peer support staff.

- Include:
  - Strategies
  - Resources required
  - Timeline
  - Responsible roles

Key Takeaways

- Organizational capacity = ability to scale and sustain peer services.

- Strong workforce and leadership are at the center of readiness.

- Action planning helps move from reflection to implementation.

- Capacity building strengthens credibility with provider partners.

Contracting to Provide Peer Services: Organizational Environment

September 17, 2025

Learning Objectives

- Define the elements of a supportive and recovery-based organizational environment for collaboration.

- Evaluate the organization's current environment and readiness for change.

- Develop strategies to maintain peer support values within multidisciplinary models.

- Identify and address environmental barriers to collaboration.

Choose one word that describes a recovery-oriented environment.

Instruction

A supportive organizational environment is essential for successful collaboration with other providers.

Key values include:
- Mutual respect
- Shared goals
- Fidelity to peer support principles

Organizations must identify environmental barriers to collaboration and develop strategies to overcome them.

How does your organization support collaboration with other providers?

Environmental Self-Reflection

Guiding Questions:

- How does our environment **support** collaboration?

- In what ways do we **encourage** openness and inclusion?

- How do we **embed** a recovery orientation in our daily work?

Breakout Discussion

What strategies can support a greater focus on a recovery-oriented environment?

How can these strategies be translated into work in other provider environments?

Maintaining Peer Support Values in Other Provider Environments

Challenges:
- Pressure to conform to clinical norms ('peer drift')
- Lack of role clarity in multidisciplinary teams
- Limited supervision by experienced peer leaders
- Resistance to change within provider environments

Best Practices:
- Clearly define and communicate peer support roles
- Establish co-supervision models with peer leaders
- Provide ongoing training on peer values and boundaries
- Foster recovery-oriented environments through collaboration
- Encourage open dialogue to address resistance and build trust

Challenges in Environmental Change

- Challenges:
- Resistance from staff to new practices or values
- Fear of loss of identity or authority within teams
- Limited resources for training and support
- Organizational silos that hinder collaboration

How can internal resistance to organizational change be addressed?

Strategies to Support Environmental Change

- Engage staff early through open communication and dialogue
- Provide consistent training and peer-led supervision
- Highlight success stories to build confidence and buy-in
- Foster cross-department collaboration and shared goals
- Create feedback loops to adapt and sustain change

Key Takeaways

- Supportive environments are crucial for peer-provider collaboration.

- Recovery-based environments foster trust, inclusion, and shared purpose.

- Addressing environmental barriers ensures fidelity to peer support principles.

Closing & Next Steps

- Reflect on how your organization can strengthen its environment for collaboration.

- Identify one immediate change you can implement.

The Essentials for Contracting Models, Contract Negotiation, and Compliance for Peer Organizations

September 18, 2025

Learning Objectives

- Provide step-by-step contracting guidance

- Explore four models of contracting

- Strengthen negotiation and compliance skills

- Share tools for sustaining strong partnerships

What experience does your organization have with contracting to provide peer services?

Why Contract with Peer-Run Organizations?

- Brings lived experience expertise into clinical settings
- Increases engagement and reduces no-shows
- Strengthens recovery orientation and cultural responsiveness
- Expands provider capacity & workforce diversity
- Provides access to Medicaid reimbursable peer services

Overview of Four Contracting Models

1. Designated Contracting Organization (DCO) / Subcontracting for Services

2. Contracting Staff

3. Contracting Supervision

4. Training & Technical Assistance Only

Contracting Model 1: DCO / Subcontracting for Services

- Peer-run org delivers full program (staffing, supervision, potentially billing, reporting).

- Best for well-developed PROs with infrastructure & compliance systems.

- Benefits: robust partnership, program fidelity, turnkey implementation.

Contracting Model 2: Contracting Staff

- PRO employs peers who work onsite at host organization.
- Host manages program delivery; PRO handles hiring & supervision.
- Benefits: workforce pipeline, dual supervision, stronger retention.

Contracting Model 3: Contracting for Supervision

- Host employs peer staff; PRO provides reflective supervision & professional development.

- Often used with dual supervision models.

- Benefits: fidelity, peer-specific mentoring, admin bandwidth.

Contracting Model 4: Training & TA Only

- PRO provides consulting, training, evaluation, fidelity tools.
- Flexible, project-based or ongoing.
- Benefits: affordable entry point, builds culture readiness.

Which model feels most feasible for your organization?

Anatomy of a Contract

- Scope of services & deliverables

- Payment terms, duration, renewal

- Performance metrics & reporting

- OTPS: equipment, mileage, supervision costs

- Compliance & termination clauses

Group Discussion: Contract Element Review

- What are the most critical elements to prioritize in negotiation?

Navigating the Proposal Process

Steps:

  1. Identify potential partners

  2. Align with readiness assessment

  3. Build a competitive proposal (value + compliance capacity)

Negotiation Strategies

- Know your value: outcomes, workforce expertise
- Use data: retention, no-show reduction, outcomes
- Anticipate funder concerns & address proactively
- Push for sustainability (fair wages, supervision funding)

Ensuring Compliance

- Build clear workplans & documentation protocols
- Track deliverables and KPIs
- Maintain data collection for outcomes & fidelity
- Address compliance issues proactively

What is your biggest current or anticipated compliance challenge?

Maintaining Successful Partnerships

- Regular check-ins & communication

- Showcase impact with data & stories

- Adapt and respond to partner needs

- Build trust & long-term collaboration

Brainstorming Activity

- What strategies have you used (or could use) to strengthen contracting relationships?

Next Step

- Identify one immediate next step to advance contracting readiness.