



Office of Statewide Health
Planning and Development

Song Brown
Family Nurse Practitioner Training Program
Primary Care Physician Assistant Training Program

Grant Guide
For Fiscal Year 2018-19

If your program requires approval to contract from a coordinating authority, please inform the authority of the terms and conditions contained in the sample grant agreement. All applicants will be required to agree to the terms and conditions prior to receiving funds. The Office of Statewide Health Planning and Development will not make changes to the terms and conditions specified in the sample grant agreement.

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A. Background/Mission

Pursuant to the Song-Brown Health Care Workforce Training Act, Health & Safety Code Sections 128200, et. seq., the California Healthcare Workforce Policy Commission (Commission) will consider applications to support the training of family nurse practitioner (FNP) and primary care physician assistant (PA) training programs. After review of the applications, the Commission makes recommendations for grant awards to the Director of the Office of Statewide Health Planning and Development (OSHPD).

OSHPD works to increase and diversify California's health workforce through the Healthcare Workforce Development Division (HWDD). The Song-Brown program funds institutions that train primary care health professionals by providing healthcare in California's medically underserved areas. Competitive proposals demonstrate a commitment to Song-Brown goals and success in meeting the three statutory priorities:

- Attracting and admitting under-represented minorities and those from underserved communities
- Training students in underserved areas
- Placing graduates in underserved areas

B. Eligibility, Available Funding, and Award Levels

1. Eligibility

Each Family Nurse Practitioner Training Program approved for funding under the Song-Brown Health Care Workforce Training Act must be operated by an accredited California School of Nursing or approved by the Regents of the University of California or by the Trustees of the California State University and Colleges, or approved by the Board of Registered Nursing, pursuant to Section 2834-2837, Article 8, Chapter 6, Div. 2, of the Business and Professions Code.¹

Each Primary Care Physician Assistant Training Program approved for funding under the Act must meet the standards set forth by the Medical Board of California for the training of the Primary Care Physician Assistants, pursuant to Section 3500, Chapter 7.7, Div. 2 of the Business and Professions Code and to Section 1399.500, Article 1-7, Div. 13.8, Physician Assistant Examining Committee of the Medical Board of California, Title 16 of the California Code of Regulations.²

2. Available Funding

Grant awards are limited to the funds available from the state's Fiscal Year 2018-19 Budget Act, as specifically approved in budgetary line items. This is a one-time grant opportunity with no implied or expressed guarantee of subsequent funding after the initial contract award resulting from this application.

¹ California Healthcare Workforce Policy Commission Family Nurse Practitioner Standards (see Attachment C)

² California Healthcare Workforce Policy Commission Primary Care Physician Assistant Standards (see Attachment D).

Approximately \$1,350,000 in Capitation funding is available for one year from the California Health Data Planning Fund to support FNP Training Program and PA Training Program grants.

OSHPD may award full, partial, or no funding to an applicant based on the applicant's success in meeting the selection criteria and the amount of funds available to award. Competitive proposals will meet the Song-Brown Program evaluation criteria and demonstrate a commitment to Song-Brown goals.

3. Award Levels

Capitated rate is \$12,000 per student with maximums based on student enrollment.

Program Size	Maximum Request Amount	Maximum Students
Up to 50 enrolled students	\$96,000.00	8 students
Up to 75 enrolled students	\$120,000.00	10 students
Up to 100 enrolled students	\$168,000.00	14 students
101 or more enrolled students	\$192,000.00	16 students

C. Initiating an Application

To apply, you must comply with the instructions contained in Section N. CalREACH Technical Guide of this Grant Guide. It is the applicant's responsibility to provide all necessary information for OSHPD to evaluate the application and verify information contained in the application.

You must register and submit all applications through the web-based application Responsive Electronic Application for California's Healthcare (CalREACH), at <https://calreach.oshpd.ca.gov>.

Applicant organizations and designees must register as a new user or enter an existing username and password to access the application materials. Section N. CalREACH Technical Guide details information regarding CalREACH, including how to register, and how to complete and submit your application.

D. Budget Restrictions

These funds are for the general education and training of students only. Applicants do not submit a proposed budget, as OSHPD will pay grantees on a capitated rate per student. The funding established pursuant to this act shall be used to expand primary care services. These funds shall not be used to supplant existing state or local funds to provide primary care services.

Indirect costs are not allowable for capitation funding.

E. Evaluation and Scoring Procedures

1. Evaluation and Scoring

The Song-Brown program applications will receive a quantitative score using the information provided in the application. Please refer to Attachment A for Evaluation and Scoring Criteria.

2. Review Process

During the review process, Song-Brown staff will verify submission of all required information as specified in this Grant Guide and score applications using only the established evaluation/scoring criteria. Staff will advise the Commission on application revisions. Applications that are most consistent with the intent of this grant will be considered most competitive.

If, in the opinion of OSHPD, an application contains false or misleading information, or includes documentation that does not support an attribute or condition claimed, OSHPD will reject the application. OSHPD reserves the right to reject any or all applications or to reduce the amount of funding provided to an applicant.

3. Presentations

After reviewing and scoring applications, Song-Brown will identify a select number of programs to present to the Commission at its meeting on January 23-January 24, 2019. The Program Director, or other authorized representative, will provide a summary of the training program, an overview of any successfully demonstrated strategies, and outcomes data for any current pipeline programs in place. The presentations serve to help capture and share information and best practices across programs. Your presentation, or lack thereof, will not influence your final score. Please refer to Attachment G for Song-Brown Program Funding Meeting Presentation Guidelines.

Song-Brown encourages all applicants to attend the Commission meeting. Though attendance is voluntary, it provides a valuable opportunity for programs to leverage the information, best practices, and expertise shared in the presentations to help identify and address any deficiencies or opportunities for continuous improvement on future Song-Brown grant applications. The meeting also provides an opportunity to address the Commission, if desired, and answer any questions the Commission might have.

F. Final Selections

During the funding meeting, the Commission will make award recommendations based on which applications best meet the Song-Brown goals and statutory priorities. Once the OSHPD Director concurs with the Commission award recommendations, OSHPD will announce grantees by the date listed in this Grant Guide.

G. Post Award and Payment Provisions

- Grantees will enter into a one year agreement.

- OSHPD makes payments in arrears and upon receipt of a quarterly or semester certification from the program documenting the program has met the intent of the grant.
- OSHPD will withhold the final payment due to the Contractor under this agreement until all required reports are submitted to OSHPD and approved.

H. Grant Agreement Deliverables – Final Report

All grantees must submit a Final Report, along with supporting materials, within 45 days of the end of the grant term. The Final Report must contain a detailed account of how the funds were expended. OSHPD will provide grantees the Final Report template and instructions. The grantee will submit their Final Report as specified and adhere to the terms of the grant. If, upon reviewing the Final Report, OSHPD finds that not all requirements have been met and/or funds have not been expended, OSHPD will request remittance of those funds from the grantee.

I. Additional Terms and Conditions

1. By submitting an application, you and your organization agree to the grant terms and conditions specified in this Grant Guide.
2. If your program requires approval to contract from a coordinating authority, please inform the authority of the terms and conditions contained in the sample grant agreement(s). All applicants will be required to agree to the terms and conditions prior to receiving funds. OSHPD will not make changes to the terms and conditions specified in the sample grant agreement(s).
3. The funding established pursuant to this act shall be utilized to expand primary care services. These funds shall not be used to supplant existing state or local funds to provide primary care services.
4. Grant agreements must be signed and submitted by the due date provided by OSHPD. Failure to sign and return the grant by the due date may result in loss of award.
5. OSHPD will consider any edits to the grant agreement as a counter-proposal and will not accept them.
6. When the grantee is a county, city, school district, or other local public body, a copy of the resolution, order, motion, ordinance, or other similar document shall accompany the signed grant from the local governing body authorizing execution of the agreement.
7. The grantee will submit their Final Report as specified and adhere to the deadlines as specified in this Grant Guide. Anticipating potential overlaps, conflicts, and scheduling issues, to adhere to the terms of the grant, is the sole responsibility of the grantee.
8. All grant deliverables, including reports and supporting documentation, shall become subject to the Public Records Act.
9. The grantee shall submit in writing any requests to change or extend the grant or to change the budget at least 45 days before the grant end date.

J. Grant Questions and Answers

Read this Grant Guide in its entirety. You can find answers to most questions in this Grant Guide and/or in the CalREACH system. If you have any questions relating to the intent or interpretation of grant language, email Song-Brown staff at songbrown@oshpd.ca.gov.

K. Technical Assistance

OSHPD will post training materials at <https://www.oshpd.ca.gov/HWDD/Song-Brown-Program.html>. To assist you in completing and submitting an application, the training materials will include the grant’s main objectives, what an application should contain, and a brief overview of CalREACH.

L. Key Dates

The key dates for the program year are as follows:

Key Events	Dates and Times	
Technical Assistance–Available on Song Brown website	July 9, 2018	
Application open in the CalREACH system	July 16, 2018	3:00 PM PST
Application submission deadline	August 16, 2018	3:00 PM PST
Applicants notified about preliminary scores and possible invitation to present at Commission Meeting	December 2018	
Commission Meeting / Presentations / Awards	January 23-24, 2019	
Send notice to awardees	January 30, 2019	
Grant term	June 30, 2019–August 15, 2020	5:00 PM PST

M. CalREACH Application Components

A submitted application must contain all information and conform to the format described in this Grants Guide. It is the applicant’s responsibility to provide all necessary information for the Commission to evaluate the application.

A completed application consists of the following main sections:

1. Application
2. Statutory Criteria
3. Budget Expenditures
4. Attachments
5. Assurances

N. CalREACH Technical Guide

1. Accessing the Application System

OSHPD uses CalREACH to allow applicants to submit applications in response to this grant opportunity. The information contained in this Grant Guide provides all the basic technical information needed to complete an application in the system.

To access CalREACH, go to <http://calreach.oshpd.ca.gov>. To ensure proper functionality in CalREACH, use the Internet Explorer or Google Chrome browser.

2. Registration and Login

All applicant organizations and their designees must register in CalREACH. To register for the first time, click the NEW USER link on the “Login Page” and follow the instructions. **You must wait for approval by Song-Brown staff before proceeding.** When approved, you will receive a confirmation email allowing you to log in using your username and password. You then will be directed to the “**WELCOME PAGE**”. From the welcome page, you have the option to **View Available Opportunities, Open My Inbox, or Open My Tasks.**

3. Initiating an Application

Click on **VIEW OPPORTUNITIES**, locate the **Song-Brown Family Nurse Practitioner/Primary Care Physician Assistant Capitation 2018 Grant**, click the **APPLY NOW** button. The Program Director must be registered and have initiated an application before any designees can access the application.

a. Copying Data Forward

If you previously applied for FNP/PA funding you can copy forward your graduate and training site data by choosing your last application from the drop-down list. It is your responsibility to ensure that graduate and training site information is up to date. Program and Contractor Information will also copy forward.

b. Providing Application Access to Others

The Program Director has administrative rights to add or remove other users to/from applications. Only users that have registered and been assigned to an organization can be added to an application.

The Program Director will be automatically added to all corresponding related documents as each is created. New users to CalREACH will not be automatically added to existing applications. However, any user may be manually added to the application throughout the entire application completion process. To add users to an application, click on the application of choice in the **MY TASKS** section on the “**Main Menu**” page. Click on the **VIEW MANAGEMENT TOOLS** button under “**Access Management Tools**”, and choose the **ADD/EDIT PEOPLE** link. Type in the name of the individual in the search criteria box and click the **SEARCH** button. From the search results, select the individual’s name, set the security role, and fill-in the date you would like this individual to begin having access to the application. Click **SAVE**.

4. Filling out an Application

a. Determining Space Limitation

Some forms in the application have character limitations (e.g., 3000 characters for text boxes). The bottom of the text box clearly notes the character limit. Please limit your response when completing these forms.

b. Copying-and-Pasting into CalREACH

Be cautious while using the copy-and-paste function of most word processing programs to transfer text into text boxes within CalREACH. CalREACH will not recognize certain formatting, including tables, graphs, bullets, and certain tabs. Copied text may appear correct on the screen but still cause an error when trying to

print the page. Copying and pasting text into any standard “notepad” (or equivalent) program first will show comparable formatting to the text boxes in CalREACH.

c. Saving Application Forms in CalREACH

Before clicking to the next form or exiting the system, click the **SAVE** button or you will lose your work. Saving a form or an application is NOT submitting an application. To submit your application, please see the “Submitting an Application” section below.

d. Accessing a Saved Application

If you stop before completing the application, you may continue where you left off by logging into the system with your username and password, clicking the **OPEN MY TASKS** button from the “Welcome” page, and selecting the application you would like to access by clicking on the application name.

e. Printing an Application

At any time, you may print a copy of your application. From your Song-Brown application menu page, click the **VIEW MANAGEMENT TOOLS** button, and click the **CREATE FULL PRINT VERSION** link.

f. Deleting an Application

To delete an application that was started, click the **MY HOME** link in the **blue bar** at the top of the page. Click the **OPEN MY TASKS** button. Click on the application name, click the **VIEW STATUS OPTIONS** button, and click the **APPLY STATUS** button underneath **APPLICATION CANCELLED**. It will no longer appear in My Tasks.

g. Submitting an Application

A saved application is NOT a submitted application. The application is considered submitted when the application status is changed to **SUBMITTED** in CalREACH. You can do this on the main screen under **CHANGE THE STATUS** on the Song-Brown Menu page by clicking the **VIEW STATUS OPTIONS** button. On the Status Options page, see **APPLICATION SUBMITTED** and click the **APPLY STATUS** button located underneath.

Please note:

1. A completed application contains all completed **FORMS** including documents uploaded into the **REQUIRED ATTACHMENTS** Form.
2. Applications will not submit if there are any errors found in the system, including missing information such as required attachments, contact information, etc. A red hand icon next to the **FORM** link denotes an error. Go to that page and make changes to clear the error. You may also check page errors by clicking on the **GLOBAL ERRORS** button.
3. OSHPD will not consider late or incomplete applications. For more detailed information, refer to the “Key Dates” section in this Grant Guide.
4. **Once you click the submit button, you cannot go back to revise the application.**
5. By submitting the application, you/your organization agree to the grant Terms and Conditions.
6. CalREACH will email a confirmation of receipt to the designated Program Director.

5. Application Format and Content

Once you have agreed to apply for Song-Brown funding in CalREACH, you will have the ability to View, Edit, and Complete forms on the **Family Nurse Practitioner/Primary**

Care Physician Assistant Program Menu page. Click the **VIEW FORMS** button to access the electronic application.

NOTE: The system will time-out after two hours from the start of the application. To prevent the system from timing-out, save your work, logout, and log back in.

IMPORTANT: To access a saved application, see Section N. CalREACH Technical Guide Number 3 section of this Grant Guide.

There are **10 forms** required for your Capitation application:

1. Program Information
2. Contractor Information
3. Executive Summary
4. Statistics
5. Graduates Information
6. Underrepresented Minorities
7. Training Sites
8. Program Expenditures
9. Required Attachments
10. Program Director Assurances

Each CalREACH form contains instructions at the top of the page and notes character limits. Enter the appropriate information into each form. **To save your work**, click the **SAVE** button in the upper right-hand corner regularly as well as any time you leave a form or the CalREACH system.

Form 1: Program Information

Practice Type

Select from the following program type:

- Family Nurse Practitioner Program
- Physician Assistant Program
- Combined Family Nurse Practitioner / Primary Care Physician Assistant Program

Funding Availability by Program Size

Click on the radial button corresponding to the number of enrolled students in your program. Click the **SAVE** button.

Program Director

This field will automatically populate using the name provided when the account was created. The Program Director is responsible for all grant deliverables, including quarterly certifications and final reports. The Program Director is also the liaison and point of contact between their institution and Song-Brown in all matters related to the grant.

Note: Email songbrown@oshpd.ca.gov as soon as possible of any program director changes during the application period.

Program Director Degree

Select the program director's degree from the dropdown list.

Program Director Email and Phone

Provide contact information as it should appear in the grant.

Title of Training Program

Select your training program from the dropdown list. If the training program is in the dropdown list, the address will populate once "saved". If the training program is not in the dropdown list, fill in the Title of Training Program, and complete address information and county. A complete address includes street address, city, state, and zip code. Do not use a P.O. Box address.

Requested funds are based on the number of enrolled students per year as listed below:

Program Size	Maximum Request Amount
Up to 50 enrolled students	\$96,000.00
Up to 75 enrolled students	\$120,000.00
Up to 100 enrolled students	\$168,000.00
101 or more enrolled students	\$192,000.00

Quarterly or Semester Payment Option

At the bottom of the page, click the corresponding radial button next to **Quarterly** or **Semester** to indicate the frequency of your payments.

Form 2: Contractor Information

Name of Contractor Organization

The Contractor Organization is the institution that is legally and financially responsible and accountable for all state funds awarded based on this application. OSHPD enters into the grant agreement with this organization.

IMPORTANT: Provide the Contractor Organization name exactly as it should appear in the grant. The Contractor Organization name must match what is reported to the Internal Revenue Service (IRS).

Grants Officer and Title

Provide the name of the current post award Grants Officer and their contact information as it should appear in the grant, including their title.

Remit to Address

Provide the address where payments should be mailed. A complete address includes street address, city, state, and zip code. Do not use a P.O. Box address. This information must match what will be shown on the STD. 204 and grant agreement should an award be made.

Note: Email songbrown@oshpd.ca.gov, any changes in the Contractor Organization or Grants Officer during the application period (from application submission through award end term date).

Federal Tax ID Number

Provide your organization's 9-digit Federal Tax ID number. Which must match what is reported to IRS.

Form 3: Executive Summary

- **In no more than 3000 characters** provide a summary of your proposal in the first text box.
- **In no more than 3000 characters** provide a description of primary care career pathways and or pipeline activities your students participate in, including outreach efforts, curriculum, teaching modalities, successes and challenges, best practices, and any relevant outcomes related to your pipeline program.

Form 4: Statistics

Graduate Years: 2016/17 and 2015/16:

Provide 2016/17 and 2015/16 information for graduates of the program.

1. Provide the **total enrollment capacity** for your program based on your accrediting body or college.
2. Provide the **total number of first year slots available** for the graduate years indicated in the table.
- 2a. Provide the **total number of second year slots available** for the graduate years indicated in the table.
3. Provide the **number of qualified students that applied to your program** for the graduate years indicated in the table.
4. Provide the **number of students accepted to your program** for the graduate years indicated in the table.
5. Provide the **number of accepted students that enrolled in your program** for the graduate years indicated in the table.
6. Provide the **number of second year students enrolled that graduated** for the graduate years indicated in the table.
7. Provide the **total number of male students trained** during the graduate years indicated in the table.
8. Provide the **total number of female students trained** during the graduate years indicated in the table.
9. Provide the **total number of transgender students trained** during the graduate years indicated in the table.

Current Students:

1. Provide the total number of current male students.
2. Provide the total number of current female students.
3. Provide the total number of current transgender students.
4. Provide the average number of patients seen by first year students.
5. Provide the average number of patients seen by second year students.

6. Provide the percent (average) of your programs total clinical hours spent in areas of unmet need on an annual basis.
7. Provide a response to your FNP program having an 85% or better first-time pass rate (if applicable).
8. Provide a response to your PA program having an 85% or better first-time pass rate (if applicable).

Form 5: Graduates Information

IMPORTANT: Complete one page for EACH of your graduates. The total number of graduates must match the total number of graduates you enter into the Underrepresented Minorities page.

- If you are a **new program** and have **no graduates** to report for the graduate years requested, check the box for “This is a new program with no graduates to report.” Click **SAVE** and proceed to the next page of the application.
- Provide complete graduate data for two years’ post-graduation: 2016/17 and 2015/16.
- Provide current practice site data. If you have chosen to copy data from a previous year, you are certifying that you have verified the practice site data is current.
- If you are a returning applicant using data from a previous year’s application, you must delete the graduate data for the years no longer being requested.
- Providing data other than the current practice site may affect your scores.
- Do not provide home addresses of graduates.

Graduate Practice Site

If you have graduates to report, follow the steps below to enter your graduate information.

1. Select the **Grad Year** from the dropdown menu. Provide graduates for all of the years identified in the Grad Year dropdown list.
2. Provide the graduate’s National Provider Identifier Number.
3. Provide the graduate’s **first name and last name**.
4. Check the boxes if a graduate is OSHPD’s Health Professions and Education Foundation (**HPEF**) **Scholar** and or National Health Service Corps (**NHSC**) **Scholarship Recipient**.
5. Using the dropdown list, select the **Practice Specialty**.
6. Click **SAVE**. Additional questions will now appear on the screen.
 - a. **For a graduate that is both practicing in California AND you know the name of the practice site at which the graduate is working:** click on the **ADD/EDIT ADDRESS in Option 1**. Enter some or all of the name of the graduate’s **practice site** and click on the **SEARCH** button. Select the correct practice site and then click **INSERT ADDRESS**. If you receive an error message, the graduate’s practice site is **NOT in the CalREACH database**. Find the correct option below to clear the error message.
 - b. If you know the graduate is located in California BUT DO NOT KNOW their current practice site, or for a graduate not practicing in California click **UNKNOWN** in Option 2—even if you know the graduate’s out-of-state practice

- location, click UNKNOWN, choose an option from the drop-down box, and click **SAVE**.
- c. For a graduate practice site not found in the drop-down list in Option 1, enter the name of the practice site name under **Option 3** and click **SAVE**. Then click on the **ADD/EDIT ADDRESS in Option 3** and **enter the address** for this practice site and click **SAVE**. If you get a "Page Error(s)" message, click the **Back** button and look to see if the address you entered shows up in the appropriate field under **Option 3**. If it does appear, click **SAVE**. This should clear up the error message. If it does not, contact Song-Brown staff at songbrown@oshpd.ca.gov.
 - d. **For a graduate working in private practice**, enter the first and last name and practice title of the private practitioner for which the graduate is working and click **SAVE**. Click **ADD/EDIT ADDRESS in Option 4** to provide the private practice site location.

To delete a graduate:

1. Select the graduate from the dropdown menu on the upper-right side of the page.
2. Click the **GO** button. This will open that graduates' page.
3. Click the **DELETE** button at the top of the screen.
4. A warning message will pop up to confirm that you wish to delete this page. Click **OK** to confirm.
5. The graduate is now deleted. **Do not** click **SAVE** at this point. From here, click **ADD** to continue entering graduates or proceed to another part of your application.

Form 6: Underrepresented Minorities

Graduates

List the racial/ethnic background of graduates for the graduate years indicated.

NOTE: The total number of graduates must match the total number of graduates input into the Graduates Information page.

Current Students

List the racial/ethnic background of current first and second year students in your program.

Form 7: Training Sites

Training Sites: Follow the steps below to enter all of your training sites. List all training sites alphabetically and only if used within the last graduate year.

1. Before entering any data in the fields in this form, click **SAVE**.
2. In Section 1, click **ADD/EDIT ADDRESS**.
3. Enter the **training site name** in the text box and click **SEARCH**.
 - a. **If there is a training site match:** Select the correct address in the search results and click **INSERT ADDRESS**.
 - b. **If there is no training site match:** click the **BACK** button and answer the question, "**Is the training site a private practitioner's office?**" An additional section will appear (either **Option 2** or **Option 3**) based on how you answer the above question.

- If you selected **no**, go to **Option 2**. Enter the practice site name. Click **SAVE**. Use the **ADD/EDIT ADDRESS** feature to input the street address, city, state, and zip code. You must provide or verify the county.
- If you selected **yes**, go to **Option 3**. Enter the private practitioner's first and last name, and title. Click **SAVE**. Then, use the **ADD/EDIT ADDRESS** feature to add the street address, city, state, and zip code. You must provide or verify the county.
- c. If you are done, **do not** click **SAVE** again or it will add another page. Instead proceed to the next section of your application. To continue adding training sites, click **ADD**, then repeat the above steps until you have entered all training sites.

Form 8: Program Expenditures

Provide program expenditures for academic year 2017/18. See the [Song-Brown Glossary of Terms](#) for program expenditure category definitions.

- Personnel
- Operating Expenses
- Major Equipment
- Other Costs

When finished, click **SAVE**. The form will display the total funds entered.

Form 9: Required Attachments

- Provide copies of the most recent accreditation letter from the appropriate accrediting/approval bodies, including the California Board of Registered Nursing (BRN) and or Accreditation Review Commission on Education for the Physician Assistant (ARC-PA).
 - **IMPORTANT: You must include any written responses to the accrediting bodies regarding concerns or citations.**
- Provide documentation of the first-time pass rate for Family Nurse Practitioners on the American Nurses Credentialing Center, American Association of Nurse Practitioners, national certification exam for your 2016/17 graduating classes.
- Provide documentation of the first-time pass rate for Primary Care Physician Assistants on the Physician Assistant National Certifying Exam for your 2016/17 graduating classes.

When finished, click **SAVE**.

Form 10: Program Director Assurances

You must agree to **both statements** before moving on to Application Submission.

When finished, click **SAVE**.

O. Department Contact

For questions related to Song-Brown and the electronic application in CalREACH, please email songbrown@oshpd.ca.gov.

Thank You!

We want to thank you for your interest in applying for the Song-Brown program and for your continued efforts in supporting those who are educating students for practice in underserved areas.

Attachment A: Evaluation and Scoring Criteria

Section I	Statutory Criteria	Total Points Available	Form
1.	Percent and number of graduates in medically underserved areas	20	Graduates Information
2.	Percent and number of underrepresented minority graduates and/or economically disadvantaged graduates	20	Under-represented Minorities
3.	Percent and number of clinical training sites in medically underserved areas.	20	Training Sites
Total points possible for Section I		60	
Section II	Other Considerations	Total Points Available	
1.	Percent and number of underrepresented minority students and/or economically disadvantaged students	15	Under-represented Minorities
2.	Percent of clinical hours in areas of unmet need (AUN) 0 points - 0% in AUN 3 points - 1% - 20% - in AUN 6 points - 21% - 40% in AUN 9 points - 41% – 60% in AUN 12 points - 61% – 80% in AUN 15 points - 81% - 100% location of program and/or training sites in AUN	15	Statistics
3.	Does the program have an 85% or better first-time pass rate on the American Nurses Credentialing Center (ANCC), American Association of Nurse Practitioners (AANP), or the Physician Assistant National Certifying Exam (PANCE) national certification exams? 0 points: 74.99% or below first-time pass rate 5 points: 75% to 84.99% first-time pass rate 10 points: 85% or better first-time pass rate	10	Statistics and Required Attachments
Total points possible for Section II		40	
Total points possible		100	

Attachment B: Authorizing Statute

Health and Safety Code Section 128200. (a) This article shall be known and may be cited as the Song-Brown Health Care Workforce Training Act.

(b) (1) The Legislature hereby finds and declares that physicians engaged in family medicine are in very short supply in California. The current emphasis placed on specialization in medical education has resulted in a shortage of physicians trained to provide comprehensive primary health care to families. The Legislature hereby declares that it regards the furtherance of a greater supply of competent family physicians to be a public purpose of great importance and further declares the establishment of the program pursuant to this article to be a desirable, necessary, and economical method of increasing the number of family physicians to provide needed medical services to the people of California. The Legislature further declares that it is to the benefit of the state to assist in increasing the number of competent family physicians graduated by colleges and universities of this state to provide primary health care services to families within the state.

(2) The Legislature finds that the shortage of family physicians can be improved by the placing of a higher priority by public and private medical schools, hospitals, and other health care delivery systems in this state, on the recruitment and improved training of medical students and residents to meet the need for family physicians. To help accomplish this goal, each medical school in California is encouraged to organize a strong family medicine program or department. It is the intent of the Legislature that the programs or departments be headed by a physician who possesses specialty certification in the field of family medicine, and has broad clinical experience in the field of family medicine.

(3) The Legislature further finds that encouraging the training of primary care physician's assistants and primary care nurse practitioners will assist in making primary health care services more accessible to the citizenry, and will, in conjunction with the training of family physicians, lead to an improved health care delivery system in California.

(4) Community hospitals in general and rural community hospitals in particular, as well as other health care delivery systems, are encouraged to develop family medicine residencies in affiliation or association with accredited medical schools, to help meet the need for family physicians in geographical areas of the state with recognized family primary health care needs. Utilization of expanded resources beyond university-based teaching hospitals should be emphasized, including facilities in rural areas wherever possible.

(5) The Legislature also finds and declares that nurses are in very short supply in California. The Legislature hereby declares that it regards the furtherance of a greater supply of nurses to be a public purpose of great importance and further declares the expansion of the program pursuant to this article to include nurses to be a desirable, necessary, and economical method of increasing the number of nurses to provide needed nursing services to the people of California.

(6) It is the intent of the Legislature to provide for a program designed primarily to increase the number of students and residents receiving quality education and training in the primary care specialties of family medicine, internal medicine, obstetrics and gynecology, and pediatrics and as primary care physician's assistants, primary care nurse practitioners, and registered nurses and to maximize the delivery of primary care family physician services to specific areas of California where there is a recognized unmet priority need. This program is intended to be implemented through contracts with accredited medical schools, teaching health centers, programs that train primary care physician's assistants, programs that train primary care nurse practitioners, programs that train registered nurses, hospitals, and other health care delivery systems based on per-student or per-resident capitation formulas. It is further intended by the Legislature that the programs will be professionally and administratively accountable so that the

maximum cost-effectiveness will be achieved in meeting the professional training standards and criteria set forth in this article and Article 2 (commencing with Section 128250).

§128205. As used in this article, and Article 2 (commencing with Section 128250), the following terms mean:

(a) "Family physician" means a primary care physician who is prepared to and renders continued comprehensive and preventative health care services to families and who has received specialized training in an approved family medicine residency for three years after graduation from an accredited medical school.

(b) "Primary care physician" means a physician who is prepared to and renders continued comprehensive and preventative health care services, and has received specialized training in the areas of internal medicine, obstetrics and gynecology, or pediatrics.

(c) "Associated" and "affiliated" mean that relationship that exists by virtue of a formal written agreement between a hospital or other health care delivery system and an approved medical school that pertains to the primary care or family medicine training program for which state contract funds are sought.

(d) "Commission" means the California Healthcare Workforce Policy Commission.

(e) "Programs that train primary care physician's assistants" means a program that has been approved for the training of primary care physician assistants pursuant to Section 3513 of the Business and Professions Code.

(f) "Programs that train primary care nurse practitioners" means a program that is operated by a California school of medicine or nursing, or that is authorized by the Regents of the University of California or by the Trustees of the California State University, or that is approved by the Board of Registered Nursing.

(g) "Programs that train registered nurses" means a program that is operated by a California school of nursing and approved by the Board of Registered Nursing, or that is authorized by the Regents of the University of California, the Trustees of the California State University, or the Board of Governors of the California Community Colleges, and that is approved by the Board of Registered Nursing.

(h) "Teaching health center" means a community-based ambulatory patient care center that operates a primary care residency program. Community-based ambulatory patient care settings include, but are not limited to, federally qualified health centers, community mental health centers, rural health clinics, health centers operated by the Indian Health Service, an Indian tribe or tribal organization, or an urban Indian organization, and entities receiving funds under Title X of the federal Public Health Service Act (Public Law 91-572).

§128207. Any reference in any code to the Health Manpower Policy Commission is deemed a reference to the California Healthcare Workforce Policy Commission.

§128210. There is hereby created a state medical contract program with accredited medical schools, teaching health centers, programs that train primary care physician's assistants, programs that train primary care nurse practitioners, programs that train registered nurses, hospitals, and other health care delivery systems to increase the number of students and residents receiving quality education and training in the primary care specialties of family medicine, internal medicine, obstetrics and gynecology, and pediatrics, or in nursing and to maximize the delivery of primary care and family physician services to specific areas of California where there is a recognized unmet priority need for those services.

§128215. There is hereby created a California Healthcare Workforce Policy Commission. The commission shall be composed of 15 members who shall serve at the pleasure of their appointing authorities:

(a) Nine members appointed by the Governor, as follows:

- (1) One representative of the University of California medical schools, from a nominee or nominees submitted by the University of California.
- (2) One representative of the private medical or osteopathic schools accredited in California from individuals nominated by each of these schools.
- (3) One representative of practicing family medicine physicians.
- (4) One representative who is a practicing osteopathic physician or surgeon and who is board certified in either general or family medicine.
- (5) One representative of undergraduate medical students in a family medicine program or residence in family medicine training.
- (6) One representative of trainees in a primary care physician's assistant program or a practicing physician's assistant.
- (7) One representative of trainees in a primary care nurse practitioners program or a practicing nurse practitioner.
- (8) One representative of the Office of Statewide Health Planning and Development, from nominees submitted by the office director.
- (9) One representative of practicing registered nurses.
- (b) Two consumer representatives of the public who are not elected or appointed public officials, one appointed by the Speaker of the Assembly and one appointed by the Chairperson of the Senate Committee on Rules.
- (c) Two representatives of practicing registered nurses, one appointed by the Speaker of the Assembly and one appointed by the Chairperson of the Senate Committee on Rules.
- (d) Two representatives of students in a registered nurse training program, one appointed by the Speaker of the Assembly and one appointed by the Chairperson of the Senate Committee on Rules.
- (e) The Deputy Director of the Healthcare Workforce Development Division in the Office of Statewide Health Planning and Development, or the deputy director's designee, shall serve as executive secretary for the commission.

§128220. The members of the commission, other than state employees, shall receive compensation of twenty-five dollars (\$25) for each day's attendance at a commission meeting, in addition to actual and necessary travel expenses incurred in the course of attendance at a commission meeting.

§128224. The commission shall identify specific areas of the state where unmet priority needs for dentists, physicians, and registered nurses exist.

§128225. The commission shall do all of the following:

- (a) Identify specific areas of the state where unmet priority needs for primary care family physicians and registered nurses exist.
- (b) (1) Establish standards for primary care and family medicine training programs, primary care and family medicine residency programs, postgraduate osteopathic medical programs in primary care or family medicine, and primary care physician assistants programs and programs that train primary care nurse practitioners, including appropriate provisions to encourage primary care physicians, family physicians, osteopathic family physicians, primary care physician's assistants, and primary care nurse practitioners who receive training in accordance with this article and Article 2 (commencing with Section 128250) to provide needed services in areas of unmet need within the state. Standards for primary care and family medicine residency programs shall provide that all of the residency programs contracted for pursuant to this article and Article 2 (commencing with Section 128250) shall be approved by the Accreditation Council for Graduate Medical Education's Residency Review Committee for Family Medicine, Internal Medicine, Pediatrics, or Obstetrics and Gynecology. Standards for postgraduate osteopathic

medical programs in primary care and family medicine, as approved by the American Osteopathic Association Committee on Postdoctoral Training for interns and residents, shall be established to meet the requirements of this subdivision in order to ensure that those programs are comparable to the other programs specified in this subdivision. Every program shall include a component of training designed for medically underserved multicultural communities, lower socioeconomic neighborhoods, or rural communities, and shall be organized to prepare program graduates for service in those neighborhoods and communities. Medical schools receiving funds under this article and Article 2 (commencing with Section 128250) shall have programs or departments that recognize family medicine as a major independent specialty. Existence of a written agreement of affiliation or association between a hospital and an accredited medical school shall be regarded by the commission as a favorable factor in considering recommendations to the director for allocation of funds appropriated to the state medical contract program established under this article and Article 2 (commencing with Section 128250). Teaching health centers receiving funds under this article shall have programs or departments that recognize family medicine as a major independent specialty.

(2) For purposes of this subdivision, "primary care" and "family medicine" includes the general practice of medicine by osteopathic physicians.

(c) Establish standards for registered nurse training programs. The commission may accept those standards established by the Board of Registered Nursing.

(d) Review and make recommendations to the Director of the Office of Statewide Health Planning and Development concerning the funding of primary care and family medicine programs or departments and primary care and family medicine residencies and programs for the training of primary care physician assistants and primary care nurse practitioners that are submitted to the Healthcare Workforce Development Division for participation in the contract program established by this article and Article 2 (commencing with Section 128250). If the commission determines that a program proposal that has been approved for funding or that is the recipient of funds under this article and Article 2 (commencing with Section 128250) does not meet the standards established by the commission, it shall submit to the Director of the Office of Statewide Health Planning and Development and the Legislature a report detailing its objections.

The commission may request the Office of Statewide Health Planning and Development to make advance allocations for program development costs from amounts appropriated for the purposes of this article and Article 2 (commencing with Section 128250).

(e) Review and make recommendations to the Director of the Office of Statewide Health Planning and Development concerning the funding of registered nurse training programs that are submitted to the Healthcare Workforce Development Division for participation in the contract program established by this article. If the commission determines that a program proposal that has been approved for funding or that is the recipient of funds under this article does not meet the standards established by the commission, it shall submit to the Director of the Office of Statewide Health Planning and Development and the Legislature a report detailing its objections. The commission may request the Office of Statewide Health Planning and Development to make advance allocations for program development costs from amounts appropriated for the purposes of this article.

(f) Establish contract criteria and single per-student and per-resident capitation formulas that shall determine the amounts to be transferred to institutions receiving contracts for the training of primary care and family medicine students and residents and primary care physician's assistants and primary care nurse practitioners and registered nurses pursuant to this article and Article 2 (commencing with Section 128250), except as otherwise provided in subdivision (d). Institutions applying for or in receipt of contracts pursuant to this article and Article 2 (commencing with Section 128250) may appeal to the director for waiver of these single capitation formulas. The director may grant the waiver in exceptional cases upon a clear

showing by the institution that a waiver is essential to the institution's ability to provide a program of a quality comparable to those provided by institutions that have not received waivers, taking into account the public interest in program cost-effectiveness. Recipients of funds appropriated by this article and Article 2 (commencing with Section 128250) shall, as a minimum, maintain the level of expenditure for family medicine or primary care physician's assistant or family care nurse practitioner training that was provided by the recipients during the 1973-74 fiscal year. Recipients of funds appropriated for registered nurse training pursuant to this article shall, as a minimum, maintain the level of expenditure for registered nurse training that was provided by recipients during the 2004-05 fiscal year. Funds appropriated under this article and Article 2 (commencing with Section 128250) shall be used to develop new programs or to expand existing programs, and shall not replace funds supporting current family medicine or registered nurse training programs. Institutions applying for or in receipt of contracts pursuant to this article and Article 2(commencing with Section 128250) may appeal to the director for waiver of this maintenance of effort provision. The director may grant the waiver if he or she determines that there is reasonable and proper cause to grant the waiver.

(g) (1) Review and make recommendations to the Director of the Office of Statewide Health Planning and Development concerning the funding of special programs that may be funded on other than a capitation rate basis. These special programs may include the Development and funding of the training of primary health care teams of primary care and family medicine residents or primary care or family physicians and primary care physician assistants or primary care nurse practitioners or registered nurses, undergraduate medical education programs in primary care or family medicine, and programs that link training programs and medically underserved communities in California that appear likely to result in the location and retention of training program graduates in those communities. These special programs also may include the development phase of new primary care or family medicine residency, primary care physician assistant programs, primary care nurse practitioner programs, or registered nurse programs.

(2) The commission shall establish standards and contract criteria for special programs recommended under this subdivision.

(h) Review and evaluate these programs regarding compliance with this article and Article 2 (commencing with Section 128250). One standard for evaluation shall be the number of recipients who, after completing the program, actually go on to serve in areas of unmet priority for primary care or family physicians in California or registered nurses who go on to serve in areas of unmet priority for registered nurses.

(i) Review and make recommendations to the Director of the Office of Statewide Health Planning and Development on the awarding of funds for the purpose of making loan assumption payments for medical students who contractually agree to enter a primary care specialty and practice primary care medicine for a minimum of three consecutive years following completion of a primary care residency training program pursuant to Article 2 (commencing with Section 128250).

§128225.5. (a) The commission shall review and make recommendations to the Director of the Office of Statewide Health Planning and Development concerning the provision of grants pursuant to this section. In making recommendations, the commission shall give priority to residency programs that demonstrate all of the following:

- (1) That the grant will be used to support new primary care physician slots.
- (2) That priority in filling the position shall be given to physicians who have graduated from a California-based medical school.
- (3) That the new primary care physician residency positions have been, or will be, approved by the Accreditation Council for Graduate Medical Education prior to the first distribution of grant funds.

(b) The director shall do both of the following:

(1) Determine whether the residency programs recommended by the commission meet the standards established by this section.

(2) Select and contract on behalf of the state with accredited primary care or family medicine residency programs for the purpose of providing grants for the support of newly created residency positions.

(c) This section does not apply to funding appropriated in the annual Budget Act for the Song-Brown Health Care Workforce Training Act (Article 1 (commencing with Section 128200)).

(d) This section shall be operative only if funds are appropriated in the Budget Act of 2014 for the purposes described in this section.

(e) This section shall remain in effect only until January 1, 2018, and as of that date is repealed, unless a later enacted statute, that is enacted before January 1, 2018, deletes or extends that date.

§128230. When making recommendations to the Director of the Office of Statewide Health Planning and Development concerning the funding of primary care and family medicine programs or departments, primary care and family medicine residencies, and programs for the training of primary care physician assistants, primary care nurse practitioners, or registered nurses, the commission shall give priority to programs that have demonstrated success in the following areas:

(a) Actual placement of individuals in medically underserved areas.

(b) Success in attracting and admitting members of minority groups to the program.

(c) Success in attracting and admitting individuals who were former residents of medically underserved areas.

(d) Location of the program in a medically underserved area.

(e) The degree to which the program has agreed to accept individuals with an obligation to repay loans awarded pursuant to the Health Professions Education Fund.

§128235. Pursuant to this article and Article 2 (commencing with Section 128250), the Director of the Office of Statewide Health Planning and Development shall do all of the following:

(a) Determine whether primary care and family medicine, primary care physician's assistant training program proposals, primary care nurse practitioner training program proposals, and registered nurse training program proposals submitted to the California Healthcare Workforce Policy Commission for participation in the state medical contract program established by this article and Article 2 (commencing with Section 128250) meet the standards established by the commission.

(b) Select and contract on behalf of the state with accredited medical schools, teaching health centers, programs that train primary care physician's assistants, programs that train primary care nurse practitioners, hospitals, and other health care delivery systems for the purpose of training undergraduate medical students and residents in the specialties of internal medicine, obstetrics and gynecology, pediatrics, and family medicine. Contracts shall be awarded to those institutions that best demonstrate the ability to provide quality education and training and to retain students and residents in specific areas of California where there is a recognized unmet priority need for primary care family physicians. Contracts shall be based upon the recommendations of the commission and in conformity with the contract criteria and program standards established by the commission.

(c) Select and contract on behalf of the state with programs that train registered nurses. Contracts shall be awarded to those institutions that best demonstrate the ability to provide quality education and training and to retain students and residents in specific areas of California where there is a recognized unmet priority need for registered nurses. Contracts shall be based

upon the recommendations of the commission and in conformity with the contract criteria and program standards established by the commission.

(d) Terminate, upon 30 days' written notice, the contract of any institution whose program does not meet the standards established by the commission or that otherwise does not maintain proper compliance with this part, except as otherwise provided in contracts entered into by the director pursuant to this article and Article 2 (commencing with Section 128250).

§128240. The Director of the Office of Statewide Health Planning and Development shall adopt, amend, or repeal regulations as necessary to enforce this article and Article 2 (commencing with Section 128250), which shall include criteria that training programs must meet in order to qualify for waivers of single capitation formulas or maintenance of effort requirements authorized by Section 128250. Regulations for the administration of this chapter shall be adopted, amended, or repealed as provided in Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2 of the Government Code.

§128240.1. The department shall adopt emergency regulations, as necessary to implement the changes made to this article by the act that added this section during the first year of the 2005-06 Regular Session, no later than September 30, 2005, unless notification of a delay is made to the Chair of the Joint Legislative Budget Committee prior to that date. The adoption of regulations implementing the applicable provisions of this act shall be deemed to be an emergency and necessary for the immediate preservation of the public peace, health, safety, or general welfare. The emergency regulations authorized by this section shall be submitted to the Office of Administrative Law for filing with the Secretary of State and shall remain in effect for no more than 180 days, by which time the final regulations shall be developed.

§128241. The Office of Statewide Health Planning and Development shall develop alternative strategies to provide long-term stability and non-General Fund support for programs established pursuant to this article. The office shall report on these strategies to the legislative budget committees by February 1, 2005.

Attachment C: Family Nurse Practitioner Training Program Standards

(Revised 5/13/1998)

1. Each Family Nurse Practitioner Training Program approved for funding under the Song-Brown Health Care Workforce Training Act (hereinafter “the Act”) shall be operated by an accredited California School of Medicine or an accredited California School of Nursing or shall be approved by the Regents of the University of California or by the Trustees of the California State University and Colleges, or shall be approved by the Board of Registered Nursing pursuant to Section 2834-2837, Article 8, Chapter 6, Div. 2, of the Business and Professions Code.
2. Each Family Nurse Practitioner Training Program approved for funding under the Act shall include a component of training in medically underserved multi-cultural communities, lower socioeconomic neighborhoods, or rural communities, and shall be organized to prepare primary care nurse practitioners for service in such neighborhoods or communities.
3. Appropriate strategies shall be developed by each training institution receiving funds under the Act to encourage Primary Care Nurse Practitioners who are trained in the training program funded by the Act to enter into practice in areas of unmet priority need for primary care family physicians within California as defined by the Healthcare Workforce Policy Commission (hereinafter referred to as “areas of need”). Such strategies shall incorporate the following elements:
 - a. An established procedure to identify, recruit, and admit primary care nurse practitioner trainees who possess characteristics which would suggest a predisposition to practice in areas of need, and who express a commitment to serve in areas of need.
 - b. An established counseling and placement program designed to encourage training program graduates to enter practice in areas of need.
 - c. A program component such as a preceptorship experience in an area or need, which will enhance the potential of training program graduates to practice in such an area.

Attachment D: Primary Care Physician Assistant Training Program Standards

(Revised 5/13/1998)

1. Each Primary Care Physician Assistant Training Program approved for funding under the Song- Brown Health Care Workforce Training Act (hereinafter “the Act”) shall meet the standards set forth by the Medical Board of California for the training of Assistants to the Primary Care Physician pursuant to Section 3500, Chapter 7.7, Div. 2 of the Business and Professions Code and to Section 1399.500, Article 1-7, Div. 13.8, Physician Assistant Examining Committee of the Medical Board of California, Title 16 of the California Code of Regulations.
2. Each Primary Care Physician Assistant Training Program approved for funding under the Act shall include a component of training in medically underserved multicultural communities, lower socioeconomic neighborhoods, or rural communities, and shall be organized to prepare primary care physician assistants for service in such neighborhoods or communities.
3. Appropriate strategies shall be developed by each training institution receiving funds under the Act to encourage Primary Care Physician Assistants who are trained in the training program funded by the Act to enter into practice in areas of unmet priority need for primary care family physicians within California as defined by the Healthcare Workforce Policy Commission (hereinafter referred to as “areas of need”). Such strategies shall incorporate the following elements:
 - a. An established procedure to identify, recruit and admit primary care physician assistant trainees who possess characteristics which would suggest a predisposition to practice in areas of need, and who express commitment to serve in areas of need.
 - b. An established counseling and placement program designed to encourage training program graduates to enter practice in areas of need.
 - c. A program component such as a preceptorship experience in an area of need, which will enhance the potential of training program graduates to practice in such an area.

Attachment E: Funding Guidelines for Family Nurse Practitioner Training Programs

Definition of Family Nurse Practitioner

A family nurse practitioner is a registered nurse who successfully completes a program approved as meeting standards established by the Board of Registered Nursing as specified in the California Nursing Practice Act. Primary care nurse practitioners specialize to provide health care services to specific population groups. Primary care nurse practitioners:

1. Assess the health status of individuals and families through health history, physical examination, and interpret data from both individual/family community characteristics and knowledge derived from physical, psychological, social and cultural variables.
2. Initiate a plan of care that includes health promotion, health maintenance, disease prevention, treatment, guidance and counseling, education, and referral.
3. Work in collaboration with other health care providers and agencies to provide coordinated and comprehensive primary care.

Family nurse practitioners provide primary care to individuals from diverse cultural backgrounds across the life span within the context of her/his family and community. The American Nurses Credentialing Center and the American Academy of Nurse Practitioners provide national certification of Family Nurse Practitioners through validation of educational preparation and successful completion of a written examination.

Program Approval

The nurse practitioner training program shall be required to have, at minimum, approval from the California Board of Registered Nursing. Additionally, programs should be encouraged to seek and maintain appropriate program accreditation through the professional organizations accrediting nursing education programs. Criteria for program accreditation and evaluation, as stipulated in **Criteria for**

Evaluation of Nurse Practitioner Programs* should be met by each program. These criteria address organization and administration, students, curriculum, resources, faculty and faculty organization, and evaluation.

Strategies Relating To Areas of Need

Special consideration by the Healthcare Workforce Policy Commission is given those training programs which have developed coherent strategies for locating their graduates in California's areas of unmet priority need for primary care family physicians as defined by the Commission; which developed close ties with communities and neighborhoods which are experiencing a shortage of medical care; which have success in attracting and admitting members of minority groups to the program; and which have the best records in placing graduates in medically underserved areas.

Integration with Family Practice Residency Training Programs

Special consideration is given to primary care nurse practitioner training programs that are integrated with family practice residency training programs.

Clinical Components

All training programs should include clinical practice supervised by the faculty. There should be a preceptorship designed to prepare the family nurse practitioner for practice in an area of unmet need for primary care as defined by the Healthcare Workforce Policy Commission. For the purposes of this training, a preceptorship is a primary care practice experience supervised by a designated preceptor (a nurse practitioner or physician) who has responsibility for teaching, supervising, and evaluating the trainee and providing an environment which permits observation, active participation and collaboration in the delivery of family oriented care.

Curriculum

The curriculum shall be directed toward preparing registered nurses to function as family nurse practitioners and to effectively deliver primary health care. The curriculum should be structured to emphasize the diagnosis, treatment, and management of acute and chronic conditions of pediatric, adult and elderly patients. The curriculum should give appropriate emphasis to family oriented health care.

The curriculum should be developed using the criteria of the National Organization of Nurse Practitioner Faculty (NONPF) **Curriculum Guidelines and Program Standards for Nurse Practitioner Education****. These guidelines delineate expected competencies in the practice areas of management of client health/illness status, the nurse-client relationship, the teaching-coaching function, the professional role, managing and negotiating health care delivery systems, and monitoring and ensuring the quality of health care practice.

Data Collection and Evaluation

Each training program should submit a plan for collecting family nurse practitioner trainee and graduate data and should evaluate the program, trainees, and graduates to include at least the following:

1. Program Evaluation
 - a. Systematic curriculum evaluation by faculty and family nurse practitioner trainees in reference to the stated purposes, objectives, and conceptual framework of the program.
 - b. Effectiveness of the training program.
2. Student Data and Evaluation

Tools shall be selected and or developed that will provide descriptive information to include the following:

- a. Number of applications for admission, number of trainees enrolled.
- b. Data on trainee characteristics (i.e., age, sex, race, educational background, previous work experience, including work setting, specialty, type of position).
- c. Students' attrition and deceleration.
- d. Students fluent in a second language.
- e. Performance of trainees in classroom and clinical areas.

3. Graduate Data and Evaluation

Tools shall be selected and or developed that will provide descriptive information to include the following:

- a. Number of graduates per class and attrition.
- b. Data on trainee characteristics. (i.e., age, sex, race, educational background, previous work experience, including work setting, specialty, type of position).
- c. Job selection, employment setting, and location following graduation.
- d. Graduates practicing in California, practicing primary care and practicing with underserved areas/populations.

*National Task Force on Quality Nurse Practitioner Education (1997). Criteria for Evaluation of Nurse Practitioner Programs. Washington DC: National Organization of Nurse Practitioner Faculties.

**National Organization of Nurse Practitioner Faculties. (1995). Curriculum Guidelines and Program Standards for Nurse Practitioner Education. Washington DC: National Organization of Nurse Practitioner Faculties.

Attachment F: Funding Guidelines for Primary Care Physician Assistant Training Programs

Definition of Physician Assistant

For purposes of this program, a physician assistant is defined as a primary care practitioner who meets the requirements of Div. 2, Chapt. 7.7, Section 3501 of Business and Professions Code, and is licensed by the Physician Assistant Examining Committee.

Program Accreditation

The Physician Assistant Training Program is accredited or has provisional accreditation from the Accreditation Review Committee on Education for the Physician Assistant.

Strategies Relating to Areas of Need

Special consideration by the Healthcare Workforce Policy Commission is given those training programs which have developed coherent strategies for locating their graduates in California's areas of unmet priority need for primary care family physicians as defined by the Commission; which developed close ties with communities and neighborhoods which are experiencing a shortage of medical care; which have success in attracting and admitting members of minority groups to the program; and which have the best records in placing graduates in medically underserved areas.

Integration with Family Practice Residency Training Programs

Primary care physician assistant training programs, which are integrated with family practice residency training programs, are given special consideration.

Curriculum

The curriculum should be structured to emphasize the diagnosis, treatment, and management of acute and chronic conditions of pediatric, adult and elderly patients. The curriculum should give appropriate emphasis to family oriented health care.

Attachment G: Song-Brown Program Funding Meeting Presentation Guidelines

The following are general guidelines for consideration as applicants present their pipeline program information to the California Healthcare Workforce Policy Commission (Commission).

Time

Presentations are to be a maximum of 10 minutes, not including a question and answer period from the Commission.

Presenters

The number of presenters should be limited, preferably to one representative that can respond to Commission member's questions regarding pipeline program activities.

Presentation Content

Presenters should consider including the following information in their presentation:

- Presenters' name, title, and institution
- Brief summary of the program, including the type of program (i.e. Family Nurse Practitioner or Physician Assistant) and its mission
- How the program's pipeline activities are aimed to address key Song-Brown objectives (i.e. recruiting underrepresented minorities, expanding access to primary care, training in underserved areas, graduate retention in underserved areas)
- Outcomes data for any current pipeline programs in place

Presentation Guidelines

- Do not submit new information regarding applications during the presentation, please focus on program pipeline activities.
- Presenters may use audio or visual aids during the presentation. Presenters are responsible for presentation aids. Presenters must submit PowerPoint presentations, if any, seven days prior to the meeting to SongBrown@oshpd.ca.gov.

Attachment H: Data Collection Evaluation

Each training program should collect PA trainee and graduate data and should evaluate the program, trainees, and graduates to include at least the following.

1. Program Evaluation

- a. Systematic curriculum evaluation by faculty and PA trainees in reference to the stated purposes, objectives, and conceptual framework of the program.
- b. Effectiveness of the training program.

2. Student Data and Evaluation

Tools shall be selected and or developed that will provide descriptive information to include the following.

- a. Number of applications for admissions, number of trainees enrolled.
- b. Data on trainee characteristics (i.e. age, sex, race, educational background, previous work experience, including work setting, specialty, type of position).
- c. Student attrition and deceleration.
- d. Students fluent in a second language.
- e. Performance of trainees in classroom and clinical areas.

3. Graduate Data and Evaluation

Tools shall be selected and or developed that will provide descriptive information to include the following.

- a. Number of graduates per class.
- b. Data on characteristics of graduates (i.e. age, sex, race, educational background, and previous work experience including work setting, specialty, and type of position).
- c. Job selection, employment setting, and location following graduation.
- d. Graduates practicing in California, practicing primary care, and practicing in underserved areas/populations.
- e. Performance on PA National Certifying Examination.

Attachment I: California Healthcare Workforce Policy Commission Operating Guidelines Race and Ethnicity Definitions

American Indian, Native American or Alaska Native means persons having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community association.

Asian means persons having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, Indonesia, Japan, Korea, Laos, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

Black, African American or African means persons having origins in any of the black racial groups of Africa.

Hispanic or Latino means persons of Cuban, Mexican, Puerto Rican, Central or South American or other Spanish culture or origin regardless of race.

Native Hawaiian or Other Pacific Islander means persons having origins in any of the original peoples of Hawaii, Fiji, Guam, Samoa, Tonga, or other Pacific Islands.

White/ Caucasian, European/Middle Eastern means persons having origins in any of the original peoples of Europe, the Middle East, or North Africa.

Other means persons of any race or ethnicity not identified as American Indian, Native American or Alaska Native, Asian, Black, African American or African, Hispanic or Latino, Native Hawaiian or Other Pacific Islander, and White, Caucasian, or European/Middle Eastern.

Underrepresented Minority Definition

Underrepresented Minority (URM) refers to racial and ethnic populations that are underrepresented in the health professions relative to their numbers in the total population under consideration. In most instances, this will include Black, African-American or African, Hispanics or Latinos, American Indians, Native American or Alaskan natives, Native Hawaiians or other Pacific Islanders, and Asians **other than Chinese, Filipinos, Japanese, Koreans, Malaysians, Pakistanis, Asian Indian, and Thai.**

Attachment J: Sample Family Nurse Practitioner Grant Agreement

GRANT AGREEMENT BETWEEN THE
OFFICE OF STATEWIDE HEALTH PLANNING & DEVELOPMENT AND
SONG-BROWN PROGRAM GRANT AGREEMENT NUMBER

THIS GRANT AGREEMENT (“Agreement”) is entered into on 06/30/2019 (“Effective Date”) by and between the State of California, Office of Statewide Health Planning and Development (hereinafter “OSHPD”) and (collectively the “Grantee”).

WHEREAS, OSHPD is authorized by Song-Brown Health Care Workforce Training Act, Section 128225 to issue grants for the purpose of supporting programs that train family and primary care physicians, osteopathic family physicians, primary care physician's assistants, registered nurses and primary care nurse practitioners to provide needed services in areas of unmet need within the state.

WHEREAS Grantee applied to participate in the Song Brown Health Care Workforce Training Program, by submitting an application in response to the 2018 Song-Brown FNP/PA Capitation Application.

WHEREAS Grantee was selected by OSHPD to receive grant funds for the purpose of administering such grants.

NOW THEREFORE, OSHPD and the Grantee, for the consideration and under the conditions hereinafter set forth, agree as follows:

A. Definitions:

1. “Act” means the Song-Brown Health Care Workforce Training Act, Health and Safety Code, Sections 128200, et. seq.
2. “Application” means the grant application/proposal submitted by Grantee.
3. “Commission” means the California Healthcare Workforce Policy Commission.
4. “Director” means the Director of the Office of Statewide Health Planning and Development or his designee.
5. “Grant Agreement/Grant Number” means Grant Number awarded to Grantee.
6. “Grantee” means the fiscally responsible entity in charge of administering the Grant Funds and includes the Program identified on the Grant Application.
7. “Grant Funds” means the money provided by OSHPD for the Project described by Grantee in its Application and Scope of Work.
8. “Other Sources of Funds” means all cash, donations, or in-kind contributions that are required or used to complete the Project beyond the grant funds provided by this Grant Agreement.
9. “Program” means the Grantee’s training program(s) listed on the Grant Application.
10. “Program Director” means the Director of Grantee’s training program(s) for which grant funds are being awarded.
11. “Project” means the activity described in the Grantee’s Application and Scope of Work to be accomplished with the Grant Funds.

12. "State" means the State of California and includes all its Departments, Agencies, Committees and Commissions.
 13. "Training Institution" means the Grantee.
- B. Term of the Agreement: This Agreement shall take effect on 06/30/2019 and shall terminate on 08/15/2020.
- C. Scope of Work: Grantee agrees to the Scope of Work as set forth herein. In the event of a conflict between the provisions of this section and the Grantee's Application, the provisions of this Scope of Work Section shall prevail:
1. Comply with the Primary Care Family Nurse Practitioner Standards adopted by the California Healthcare Workforce Policy Commission as amended from time to time.
 2. Under the direction of the Program Director, use Grant Funds to provide family nurse practitioner training for **Number (number)** students in the 2018/19 Payment Year.
- D. Program Reports:
Grantee shall submit a complete Final Report on a form to be provided by OSHPD within forty-five (45) days of the end of the 2018/19 Payment Year but no later than 08/15/2020.
- E. Invoicing:
1. For services satisfactorily rendered in accordance with the Scope of Work, and upon receipt and approval of the certifications as specified in subsection (3) hereunder. OSHPD agrees to compensate Grantee in accordance with the rates specified herein.
 2. The total amount payable to the Grantee under this Agreement shall not exceed
 3. Certifications shall include the Agreement Number, the names of the student(s) trained under this Agreement, a signature by the Program Director certifying that each student(s) was engaged in activities authorized by this Agreement, and shall be submitted for payment on a quarter or semester basis in arrears to:

SongBrown@oshpd.ca.gov
 4. OSHPD will withhold the final payment due to the Grantee under this Agreement until all required reports are submitted to OSHPD and approved. OSHPD will notify the Grantee in writing when the required reports have been approved.

F. Budget Detail and Payment Provisions:

1. Budget Detail:

OSHPD shall reimburse Grantee for the expenses incurred in performing the Scope of Work in accordance with the following schedule:

Payment 1	7/1/2018 to 6/30/2019	\$12,000 per student	\$0
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G. Accounting Records and Audits: Grantee shall comply with the following reporting requirements established by the Commission, as amended from time to time:

1. Accounting: Accounting for grant funds will be in accordance with the training institution's accounting practices based on generally accepted accounting principles consistently applied regardless of the source of funds. Supporting records must be in sufficient detail to show the exact amount and nature of expenditures.

Training institutions may elect to commingle grant funds received pursuant to the Agreement with any other income available for operation of the nursing education program provided that the institution maintains such written fiscal control and accounting procedures as are necessary to assure proper disbursement of, and accounted for, such commingled funds, including provisions for:

- a. The accurate and timely separate identification of funds received;
 - b. The separate identification of expenditures prohibited by the grant criteria;
 - c. An adequate record of proceeds from the sale of any equipment purchased by funds.
2. Expenditure Reporting: Reports of the training program expenditures and enrollment of nursing students under the Agreement must be submitted as requested by the Commission or the OSHPD Director for purposes of program administration, evaluation, or review.
 3. Records Retention and Audit:
 - a. The training institution shall permit the OSHPD Director, or the California State Auditor, or the State Controller, or their authorized representatives, access to records maintained on source of income and expenditures of its nursing education program for the purpose of audit and examination.
 - b. The training institution shall maintain books, records, documents, and other evidence pertaining to the costs and expenses of this grant (hereinafter collectively called the "records") to the extent and in such detail as will properly reflect all net costs, direct and indirect, of labor, materials, equipment, supplies and services, and other costs and expenses of whatever nature for which reimbursement is claimed under the provisions of this Agreement.

- c. The training institution agrees to make available at the office of the training institution at all reasonable times during the period set forth in subparagraph (d) below any of the records for inspection, audit or reproduction by an authorized representative of the State.
- d. The training institution shall preserve and make available its records (a) for a period of three (3) years from the date of final payment under this Agreement, and (b) for such longer period, if any, as is required by applicable statute, by any other clause of this Agreement, or by subparagraph (1) or (2) below:
 - 1) If this Agreement is completely or partially terminated, the records relating to the work terminated shall be preserved and made available for a period of three years from the date of any resulting final settlement.
 - 2) Records which relate to (i) litigation of the settlement of claims arising out of the performance of this Agreement, or (ii) costs and expenses of this Agreement as to which exception has been taken by the State or any of its duly authorized representatives, shall be retained by the training institution until disposition of such appeals, litigation, claims, or exceptions.

H. Budget Contingency Clause:

1. It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this Agreement does not appropriate sufficient funds for the program, this Agreement shall be of no further force and effect. In this event, the OSHPD shall have no liability to pay any funds whatsoever to Grantee or to furnish any other considerations under this Agreement and Grantee shall not be obligated to perform any provisions of this Agreement.
2. If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this Program, the OSHPD shall have the option to either cancel this Agreement with no liability occurring to the OSHPD, or offer an agreement amendment to Grantee to reflect the reduced amount.

I. Budget Adjustments:

1. Budget adjustments consist of a change within the approved budget that does not amend the total amount of the grant.
2. All requests to change the budget shall be submitted in writing for OSHPD approval and shall include an explanation for the reallocation of funds by the Grantee. An accounting of how the funds were expended will also be submitted with the Final Report.
3. All requests for extending the grant period shall be submitted in writing to OSHPD for approval. Requests for a time extension must be made to OSHPD no later than thirty (30) calendar days prior to the expiration of the Agreement. There shall be no activity on an Agreement after its expiration.

J. General Terms and Conditions:

1. Time: Time is of the essence in this Agreement. Grantee will submit the required deliverables as specified and adhere to the deadlines as specified in this Agreement. Anticipating potential overlaps, conflicts, and scheduling issues, to adhere to the terms of the Agreement, is the sole responsibility of the Grantee.
2. Final Agreement: This Agreement, along with the Grantee's Application, exhibits, and forms constitutes the entire and final agreement between the parties and supersedes any and all prior oral or written agreements or discussions.
3. Ownership and Public Records Act: All reports and the supporting documentation and data collected during the funding period which are embodied in those reports, shall become the property of the State and subject to the Public Records Act.
4. Additional Audits: Grantee agrees that the awarding department, the Department of General Services, the California State Auditor, or their designated representative shall have the right to review and to copy any records and supporting documentation pertaining to the performance of this Agreement. Grantee agrees to maintain such records for possible audit for a minimum of three (3) years after final payment, unless a longer period of records retention is stipulated. Grantee agrees to allow the auditor(s) access to such records during normal business hours and to allow interviews of any employees who might reasonably have information related to such records.

Further, Grantee agrees to include a similar right of the State to audit records and interview staff in any subcontract related to performance of this Agreement. (Gov. Code §8546.7, Pub. Contract Code §10115 et seq., Cal. Code Regs. Tit. 2, Section 1896).

5. Independent Contractor: Grantee and the agents and employees of Grantee, in the performance of this Agreement, shall act in an independent capacity and not as officers or employees or agents of the State.
6. Non-Discrimination Clause: During the performance of this Agreement, Grantee and its subcontractors shall not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of sex, race, color, ancestry, religious creed, national origin, physical disability (including HIV and AIDS), mental disability, medical condition (e.g., cancer), age (over 40), marital status, and denial of family care leave. Grantee and its subcontractors shall insure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment. Grantee and its subcontractors shall comply with the provisions of the Fair Employment and Housing Act (Gov. Code §12990 (a-f) et seq.) and the applicable regulations promulgated thereunder (California Code of Regulations, Title 2, Section 11000 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code Section 12990 (a-f), set forth in Chapter 5 of Division 4 of Title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part hereof as if set forth in full. Grantee and its subcontractors shall give written notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other Agreement.

7. Waiver: The waiver by OSHPD of a breach of any provision of this Agreement by the Grantee will not operate or be construed as a waiver of any other subsequent breach by the Grantee. OSHPD expressly reserves the right to disqualify Grantee from any future grant awards for failure to comply with the terms of this Agreement.
8. Approval: This Agreement is of no force or effect until signed by both parties. Grantee may not commence performance until such approval has been obtained.
9. Amendment: No amendment or variation of the terms of this Agreement shall be valid unless made in writing, signed by the parties and approved as required. No oral understanding or Agreement not incorporated in the Agreement is binding on any of the parties.
10. Assignment: This Agreement is not assignable by the Grantee, either in whole or in part.
11. Indemnification: Grantee agrees to indemnify, defend and save harmless the State, its officers, agents and employees from any and all claims and losses accruing or resulting to any and all Grantee's, subcontractors, suppliers, laborers, and any other person, firm or corporation furnishing or supplying work services, materials, or supplies in connection with the performance of this Agreement, and from any and all claims and losses accruing or resulting to any person, firm or corporation who may be injured or damaged by Grantee in the performance of this Agreement.
12. Disputes: Grantee shall continue with the responsibilities under this Agreement during any dispute. Any dispute arising under this Agreement, shall be resolved as follows:
 - a. The Grantee will discuss the problem informally with the Song-Brown Program Manager. If unresolved, the problem shall be presented, in writing, as a grievance to the Deputy Director, Healthcare Workforce Development Division stating the issues in dispute, the legal authority or other basis for the Grantee's position and the remedy sought.
 - b. The Deputy Director shall make a determination within ten (10) working days after receipt of the written grievance from the Grantee and shall respond in writing to the Grantee indicating the decision and reasons for it.
 - c. Grantee may appeal the decision of the Deputy Director by submitting written notice to the Director of its intent to appeal, within ten (10) working days of receipt of the Deputy Director's decision. The Director or designee shall meet with the Grantee within twenty (20) working days of receipt of the Grantee's letter. The Director's decision will be final.
13. Termination For Cause: OSHPD may terminate this Agreement and be relieved of any payments should the Grantee fail to perform the requirements of this Agreement at the time and in the manner herein provided.
14. Potential Subcontractors: Nothing contained in this Agreement shall create any contractual relation between the State and the Grantee or any subcontractors, and no subcontract shall relieve the Grantee of its responsibilities and obligations hereunder.

The Grantee agrees to be as fully responsible to the State for any and all acts and omissions of its subcontractors and of persons either directly or indirectly employed by the Grantee. The Grantee's obligation to pay its subcontractors is an independent obligation from OSHPD's obligation to disburse funds to the Grantee. As a result, the State shall have no obligation to pay or to enforce the payment of any money to any subcontractor.

15. Governing Law: This Agreement is governed by and shall be interpreted in accordance with the laws of the State of California.

16. Unenforceable Provision: In the event that any provision of this Agreement is unenforceable or held to be unenforceable, then the parties agree that all other provisions of this Agreement have force and effect and shall not be affected thereby.

17. Use of Funds: The funding established pursuant to this act shall be utilized to expand primary care services. These funds shall not be used to supplant existing state or local funds to provide primary care services.

K. Project Representatives: The project representatives during the term of this agreement are listed below. Direct all contract inquiries to:

State Agency: Office of Statewide Health Planning and Development	Grantee:
Section/Unit: Healthcare Workforce Development Division/Song-Brown	
Name:	Name (Main Contact):
Address: 2020 West El Camino Avenue, Suite 1222 Sacramento, CA 95833	Address:
Phone:	Phone:
Email:	Email:

The project representatives during the term of this Agreement will be:

State Agency: Office of Statewide Health Planning and Development	Program Representative:
Section/Unit: Healthcare Workforce Development Division/Song-Brown	
Name:	Name of Representative:
Address: 2020 West El Camino Avenue, Suite 1222 Sacramento, CA 95833	Address:
Phone:	Phone:
Email:	Email:

IN WITNESS WHEREOF, the parties hereto have executed or have caused their duly authorized officers to execute this Agreement as of 06/30/2019.

OFFICE OF STATEWIDE HEALTH
 PLANNING AND DEVELOPMENT

GRANTEE:

Signature: _____

Signature: _____

Name: _____

Name: _____

Title: _____

Title: _____

Attachment K: Sample Primary Care Physician Assistant Grant Agreement

GRANT AGREEMENT BETWEEN THE OFFICE OF STATEWIDE HEALTH PLANNING & DEVELOPMENT AND SONG-BROWN PROGRAM GRANT AGREEMENT NUMBER

THIS GRANT AGREEMENT (“Agreement”) is entered into on 06/30/2019 (“Effective Date”) by and between the State of California, Office of Statewide Health Planning and Development (hereinafter “OSHPD”) and (collectively the “Grantee”).

WHEREAS, OSHPD is authorized by Song-Brown Health Care Workforce Training Act, Section 128225 to issue grants for the purpose of supporting programs that train family and primary care physicians, osteopathic family physicians, primary care physician's assistants, registered nurses and primary care nurse practitioners to provide needed services in areas of unmet need within the state.

WHEREAS Grantee applied to participate in the Song Brown Health Care Workforce Training Program, by submitting an application in response to the 2018 Song-Brown FNP/PA Capitation Application.

WHEREAS Grantee was selected by OSHPD to receive grant funds for the purpose of administering such grants.

NOW THEREFORE, OSHPD and the Grantee, for the consideration and under the conditions hereinafter set forth, agree as follows:

A. Definitions:

1. “Act” means the Song-Brown Health Care Workforce Training Act, Health and Safety Code, Sections 128200, et. seq.
2. “Application” means the grant application/proposal submitted by Grantee.
3. “Commission” means the California Healthcare Workforce Policy Commission.
4. “Director” means the Director of the Office of Statewide Health Planning and Development or his designee.
5. “Grant Agreement/Grant Number” means Grant Number awarded to Grantee.
6. “Grantee” means the fiscally responsible entity in charge of administering the Grant Funds and includes the Program identified on the Grant Application.
7. “Grant Funds” means the money provided by OSHPD for the Project described by Grantee in its Application and Scope of Work.
8. “Other Sources of Funds” means all cash, donations, or in-kind contributions that are required or used to complete the Project beyond the grant funds provided by this Grant Agreement.
9. “Program” means the Grantee’s training program(s) listed on the Grant Application.
10. “Program Director” means the Director of Grantee’s training program(s) for which grant funds are being awarded.
11. “Project” means the activity described in the Grantee’s Application and Scope of Work to be accomplished with the Grant Funds.

12. "State" means the State of California and includes all its Departments, Agencies, Committees and Commissions.
13. "Training Institution" means the Grantee.

B. Term of the Agreement: This Agreement shall take effect on 06/30/2019 and shall terminate on 08/15/2020.

C. Scope of Work: Grantee agrees to the Scope of Work as set forth herein. In the event of a conflict between the provisions of this section and the Grantee's Application, the provisions of this Scope of Work Section shall prevail:

1. Comply with the Primary Care Physician Assistant Standards adopted by the California Healthcare Workforce Policy Commission as amended from time to time.
2. Under the direction of the Program Director, use Grant Funds to provide primary care physician assistant training for **Number (number)** students in the 2018/19 Payment Year.

D. Program Reports:

Grantee shall submit a complete Final Report on a form to be provided by OSHPD within forty-five (45) days of the end of 2018/19 Payment Year but no later than 08/15/2020.

E. Invoicing:

1. For services satisfactorily rendered in accordance with the Scope of Work, and upon receipt and approval of the certifications as specified in subsection (3) hereunder. OSHPD agrees to compensate Grantee in accordance with the rates specified herein.
2. The total amount payable to the Grantee under this Agreement shall not exceed
3. Certifications shall include the Agreement Number, the names of the student(s) trained under this Agreement, a signature by the Program Director certifying that each student(s) was engaged in activities authorized by this Agreement, and shall be submitted for payment on a quarter or semester basis in arrears to:

SongBrown@oshpd.ca.gov

4. OSHPD will withhold the final payment due to the Grantee under this Agreement until all required reports are submitted to OSHPD and approved. OSHPD will notify the Grantee in writing when the required reports have been approved.

F. Budget Detail and Payment Provisions:

1. Budget Detail:

OSHPD shall reimburse Grantee for the expenses incurred in performing the Scope of Work in accordance with the following schedule:

Payment 1	7/1/2018 to 6/30/2019	\$12,000 per student	\$0
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G. Accounting Records and Audits: Grantee shall comply with the following reporting requirements established by the Commission, as amended from time to time:

1. Accounting: Accounting for grant funds will be in accordance with the training institution's accounting practices based on generally accepted accounting principles consistently applied regardless of the source of funds. Supporting records must be in sufficient detail to show the exact amount and nature of expenditures.

Training institutions may elect to commingle grant funds received pursuant to the Agreement with any other income available for operation of the nursing education program provided that the institution maintains such written fiscal control and accounting procedures as are necessary to assure proper disbursement of, and accounted for, such commingled funds, including provisions for:

- a. The accurate and timely separate identification of funds received;
 - b. The separate identification of expenditures prohibited by the grant criteria;
 - c. An adequate record of proceeds from the sale of any equipment purchased by funds.
2. Expenditure Reporting: Reports of the training program expenditures and enrollment of nursing students under the Agreement must be submitted as requested by the Commission or the OSHPD Director for purposes of program administration, evaluation, or review.
 3. Records Retention and Audit:
 - a. The training institution shall permit the OSHPD Director, or the California State Auditor, or the State Controller, or their authorized representatives, access to records maintained on source of income and expenditures of its nursing education program for the purpose of audit and examination.
 - b. The training institution shall maintain books, records, documents, and other evidence pertaining to the costs and expenses of this grant (hereinafter collectively called the "records") to the extent and in such detail as will properly reflect all net costs, direct and indirect, of labor, materials, equipment, supplies and services, and other costs and expenses of whatever nature for which reimbursement is claimed under the provisions of this Agreement.
 - c. The training institution agrees to make available at the office of the training institution at all reasonable times during the period set forth in subparagraph (d) below any of

the records for inspection, audit or reproduction by an authorized representative of the State.

- d. The training institution shall preserve and make available its records (a) for a period of three (3) years from the date of final payment under this Agreement, and (b) for such longer period, if any, as is required by applicable statute, by any other clause of this Agreement, or by subparagraph (1) or (2) below:
 - 1) If this Agreement is completely or partially terminated, the records relating to the work terminated shall be preserved and made available for a period of three years from the date of any resulting final settlement.
 - 2) Records which relate to (i) litigation of the settlement of claims arising out of the performance of this Agreement, or (ii) costs and expenses of this Agreement as to which exception has been taken by the State or any of its duly authorized representatives, shall be retained by the training institution until disposition of such appeals, litigation, claims, or exceptions.

H. Budget Contingency Clause:

1. It is mutually agreed that if the Budget Act of the current year and/or any subsequent years covered under this Agreement does not appropriate sufficient funds for the program, this Agreement shall be of no further force and effect. In this event, the OSHPD shall have no liability to pay any funds whatsoever to Grantee or to furnish any other considerations under this Agreement and Grantee shall not be obligated to perform any provisions of this Agreement.
2. If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this Program, the OSHPD shall have the option to either cancel this Agreement with no liability occurring to the OSHPD, or offer an agreement amendment to Grantee to reflect the reduced amount.

I. Budget Adjustments:

1. Budget adjustments consist of a change within the approved budget that does not amend the total amount of the grant.
2. All requests to change the budget shall be submitted in writing for OSHPD approval and shall include an explanation for the reallocation of funds by the Grantee. An accounting of how the funds were expended will also be submitted with the Final Report.
3. All requests for extending the grant period shall be submitted in writing to OSHPD for approval. Requests for a time extension must be made to OSHPD no later than thirty (30) calendar days prior to the expiration of the Agreement. There shall be no activity on an Agreement after its expiration.

J. General Terms and Conditions:

1. Time: Time is of the essence in this Agreement. Grantee will submit the required deliverables as specified and adhere to the deadlines as specified in this Agreement. Anticipating potential overlaps, conflicts, and scheduling issues, to adhere to the terms of the Agreement, is the sole responsibility of the Grantee.
2. Final Agreement: This Agreement, along with the Grantee's Application, exhibits, and forms constitutes the entire and final agreement between the parties and supersedes any and all prior oral or written agreements or discussions.
3. Ownership and Public Records Act: All reports and the supporting documentation and data collected during the funding period which are embodied in those reports, shall become the property of the State and subject to the Public Records Act.
4. Additional Audits: Grantee agrees that the awarding department, the Department of General Services, the California State Auditor, or their designated representative shall have the right to review and to copy any records and supporting documentation pertaining to the performance of this Agreement. Grantee agrees to maintain such records for possible audit for a minimum of three (3) years after final payment, unless a longer period of records retention is stipulated. Grantee agrees to allow the auditor(s) access to such records during normal business hours and to allow interviews of any employees who might reasonably have information related to such records. Further, Grantee agrees to include a similar right of the State to audit records and interview staff in any subcontract related to performance of this Agreement. (Gov. Code §8546.7, Pub. Contract Code §10115 et seq., Cal. Code Regs. Tit. 2, Section 1896).
5. Independent Contractor: Grantee and the agents and employees of Grantee, in the performance of this Agreement, shall act in an independent capacity and not as officers or employees or agents of the State.
6. Non-Discrimination Clause: During the performance of this Agreement, Grantee and its subcontractors shall not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of sex, race, color, ancestry, religious creed, national origin, physical disability (including HIV and AIDS), mental disability, medical condition (e.g., cancer), age (over 40), marital status, and denial of family care leave. Grantee and its subcontractors shall insure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment. Grantee and its subcontractors shall comply with the provisions of the Fair Employment and Housing Act (Gov. Code §12990 (a-f) et seq.) and the applicable regulations promulgated thereunder (California Code of Regulations, Title 2, Section 11000 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code Section 12990 (a-f), set forth in Chapter 5 of Division 4 of Title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part hereof as if set forth in full. Grantee and its subcontractors shall give written notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other Agreement.
7. Waiver: The waiver by OSHPD of a breach of any provision of this Agreement by the Grantee will not operate or be construed as a waiver of any other subsequent breach by

the Grantee. OSHPD expressly reserves the right to disqualify Grantee from any future grant awards for failure to comply with the terms of this Agreement.

8. Approval: This Agreement is of no force or effect until signed by both parties. Grantee may not commence performance until such approval has been obtained.
9. Amendment: No amendment or variation of the terms of this Agreement shall be valid unless made in writing, signed by the parties and approved as required. No oral understanding or Agreement not incorporated in the Agreement is binding on any of the parties.
10. Assignment: This Agreement is not assignable by the Grantee, either in whole or in part.
11. Indemnification: Grantee agrees to indemnify, defend and save harmless the State, its officers, agents and employees from any and all claims and losses accruing or resulting to any and all Grantee's, subcontractors, suppliers, laborers, and any other person, firm or corporation furnishing or supplying work services, materials, or supplies in connection with the performance of this Agreement, and from any and all claims and losses accruing or resulting to any person, firm or corporation who may be injured or damaged by Grantee in the performance of this Agreement.
12. Disputes: Grantee shall continue with the responsibilities under this Agreement during any dispute. Any dispute arising under this Agreement, shall be resolved as follows:
 - a. The Grantee will discuss the problem informally with the Song-Brown Program Manager. If unresolved, the problem shall be presented, in writing, as a grievance to the Deputy Director, Healthcare Workforce Development Division stating the issues in dispute, the legal authority or other basis for the Grantee's position and the remedy sought.
 - b. The Deputy Director shall make a determination within ten (10) working days after receipt of the written grievance from the Grantee and shall respond in writing to the Grantee indicating the decision and reasons for it.
 - c. Grantee may appeal the decision of the Deputy Director by submitting written notice to the Director of its intent to appeal, within ten (10) working days of receipt of the Deputy Director's decision. The Director or designee shall meet with the Grantee within twenty (20) working days of receipt of the Grantee's letter. The Director's decision will be final.
13. Termination For Cause: OSHPD may terminate this Agreement and be relieved of any payments should the Grantee fail to perform the requirements of this Agreement at the time and in the manner herein provided.
14. Potential Subcontractors: Nothing contained in this Agreement shall create any contractual relation between the State and the Grantee or any subcontractors, and no subcontract shall relieve the Grantee of its responsibilities and obligations hereunder. The Grantee agrees to be as fully responsible to the State for any and all acts and omissions of its subcontractors and of persons either directly or indirectly employed by

the Grantee. The Grantee’s obligation to pay its subcontractors is an independent obligation from OSHPD’s obligation to disburse funds to the Grantee. As a result, the State shall have no obligation to pay or to enforce the payment of any money to any subcontractor.

15. Governing Law: This Agreement is governed by and shall be interpreted in accordance with the laws of the State of California.

16. Unenforceable Provision: In the event that any provision of this Agreement is unenforceable or held to be unenforceable, then the parties agree that all other provisions of this Agreement have force and effect and shall not be affected thereby.

17. Use of Funds: The funding established pursuant to this act shall be utilized to expand primary care services. These funds shall not be used to supplant existing state or local funds to provide primary care services.

K. Project Representatives: The project representatives during the term of this agreement are listed below. Direct all contract inquiries to:

State Agency: Office of Statewide Health Planning and Development	Grantee:
Section/Unit: Healthcare Workforce Development Division/Song-Brown	
Name:	Name (Main Contact):
Address: 2020 West El Camino Avenue, Suite 1222 Sacramento, CA 95833	Address:
Phone:	Phone:
Email:	Email:

The project representatives during the term of this Agreement will be:

State Agency: Office of Statewide Health Planning and Development	Program Representative:
Section/Unit: Healthcare Workforce Development Division/Song-Brown	
Name:	Name of Representative:
Address: 2020 West El Camino Avenue, Suite 1222 Sacramento, CA 95833	Address:
Phone:	Phone:
Email:	Email:

IN WITNESS WHEREOF, the parties hereto have executed or have caused their duly authorized officers to execute this Agreement as of 06/30/2019.

OFFICE OF STATEWIDE HEALTH
 PLANNING AND DEVELOPMENT

GRANTEE:

Signature: _____

Signature: _____

Name: _____

Name: _____

Title: _____

Title: _____