



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

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**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

**MEMORANDUM**

**TO:** HUMAN SERVICES COMMISSION

**THROUGH:** TRENT RHORER, EXECUTIVE DIRECTOR

**FROM:** ANNA PINEDA, DEPUTY DIRECTOR  
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

**DATE:** April 19, 2024

**SUBJECT:** NEW CONTRACT: **THE REGENTS OF THE UNIVERSITY OF CALIFORNIA, DAVIS CAMPUS (UC DAVIS) TO PROVIDE SOCIAL WORK AND RELATED SKILLS TRAINING AND WELFARE FRAUD DETECTION AND PREVENTION TRAINING**

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**CONTRACT TERM:** 7/1/24-6/30/28

<b>CONTRACT AMOUNT:</b>	<u>Contract Amount</u>	<u>Contingency</u>	<u>Total</u>
	\$697,000	\$69,700	\$766,700

**ANNUAL AMOUNT:** See Table Below

<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$522,750	\$83,640	\$90,610	\$69,700	\$766,700
<b>PERCENTAGE:</b>	75%	12%	13%		100%

The Human Services Agency and the Department of Benefits and Family Support and requests authorization to enter into a new contract with The Regents of the University of California, Davis Campus for the period of July 1, 2024 to June 30, 2028 for the amount of \$697,000 plus a 10% contingency for a total amount not to exceed \$766,700. The purpose of these contracts is for the provision of Social Work and Related Skills trainings to staff from across several departments within the City and County of San Francisco, and for provision of

the Welfare Fraud Detection and Prevention trainings to San Francisco Human Services Agency staff.

Program	Annual Amount	Contract Total	Contingency	Total Not To Exceed
Social Work and Related Skills	\$127,500	\$510,000	\$51,000	\$561,000
Welfare Fraud Detection and Prevention	\$46,750	\$187,000	\$18,700	\$205,700
Total	\$174,250	\$697,000	\$69,700	\$766,700

### **Background**

Families Rising (FaR, formerly known as Project 500) is a collaboration among the city's main agencies serving low-income families: the San Francisco Human Services Agency (SF-HSA), the Department of Public Health (SF-DPH), and the Office of Child Support Services (CDSS). FaR focuses intensive resources, wraparound services, and case management across City departments and non-profit providers for the City's most at-risk families. The goal of FaR is to improve child and family outcomes by building better cross-system collaboration among service providers that are delivering a suite of stand-alone interventions in conjunction with one another.

CalWORKs launched an initiative, formerly known as CalWORKs 2.0, which shifts from compliance oriented, directive case management to customer-led case management focused on goals. This redesigned approach helps families set goals that are aligned with program aims while taking into account families' strengths and the obstacles they face as they engage in activities on the path to full employment.

The California Department of Social Services mandates that employees receive annual training in welfare fraud prevention and detection. UC Davis Center for Human Services utilizes curriculum approved by CDSS to provide HSA eligibility workers, non-eligibility staff, and investigators the trainings to protect the welfare system from fraud and abuse.

### **Services to be Provided**

The Social Work and Related Skills trainings will focus on social work intervention skills and tools, theoretical knowledge and best practices for working with families living in scarcity. Participants will include staff from across several departments within the City and County of San Francisco (HSA CalWORKs, DPH, CDSS). During the contract term, the Contractor will provide annually a minimum of 30 full day trainings on-site in San Francisco, or virtually if needed, with each training session holding up to 35 participants.

The Welfare Fraud trainings will present techniques that can help workers prevent fraud by educating clients, conducting thorough interviews, completing legal forms and following standard procedures. Participants will gain a greater understanding of the federal and state requirements that govern the CalWORKs, CalFresh and Medi-Cal programs to assist them in their role of ensuring correct and accurate benefits are issued to applicants and recipients of aid. During the contract term, the Contractor will provide trainings either via online modules or instructor-led (dependent on scheduling and resource availability) for 800 staff.

**Location and Time of Services**

The Social Work and Related Skills trainings will occur over the course of 12 months, on a schedule to be jointly determined by HSA and the Contractor. The trainings will be delivered in whole or partial-day sessions in San Francisco, depending on the topics, at the Agency's facilities or virtually.

The Welfare Fraud trainings will be delivered either via online module or instructor-led dependent on scheduling and resource availability.

**Selection**

Contractor was selected through Request for Proposals # 1103 issued on February 2024.

**Funding**

Funding for this contract is provided by a combination of General Fund, State, and Federal funds.

**ATTACHMENTS**

Appendix A – Services to be Provided (Welfare Fraud Training)

Appendix A-1 – Services to be Provided (Social Skills and Related Training)

Appendix B – Budget (Welfare Fraud Training)

Appendix B-1 – Budget (Social Skills and Related Training)

**Appendix A-1: Scope of Services to be Provided**  
**University of California, Davis**  
**Social Work and Related Skills Training**  
**Term: 7/1/2024 – 6/30/2028**

**I. Purpose of Contract**

The purpose of the contract is to provide Social Work and Related Skills trainings. The Social Work and Related Skills trainings participants will include staff from across several departments within the City and County of San Francisco including the Human Services Agency, Department of Public Health, Department of Child Support Services and Office of Early Care and Education.

**II. Definitions**

- |          |   |
|----------|---|
| CalWORKs | California Work Opportunity & Responsibility to Kids, welfare-to-work program for families receiving Temporary Aid to Needy Families (TANF) cash aid. |
| FaR      | Families Rising, a collective impact initiative with the goal of interrupting the transmission of intergenerational poverty                           |
| SFHSA    | San Francisco Human Services Agency   |

**III. Target Population**

Family social workers and other direct services staff across multiple City and County Departments including the Human Services Agency, Department of Public Health, Department of Child Support Services and Office of Early Care and Education.

**IV. Description of Services**

Contractor shall provide the following services during the term of this contract:

- A. Provide expert advice on the training program design and delivery to CalWORKs and FaR team members, and potentially to members of the Agency’s internal Learning & Development team (i.e., Train the Trainer).
- B. Work with the CalWORKs and FaR management teams to collaboratively develop the training design, curriculum content and training delivery method. In partnership with FaR partner agencies, assess staff training needs and develop training curriculum recommendations.
- C. Training to start within 60-90 business days after getting SFHSA approval of the training curriculum based on instructor availability and if the course is an established course or a new course developed specific for SFHSA.
- D. Make modifications to the training curriculum as needed based on participant feedback and evaluation results.

- E. Modify existing curriculum modules and/or develop new modules to accomplish specific training objectives, as determined by the needs assessment and approved by SFHSA.
- F. Provide SFHSA with copies of all training materials.
- G. Ownership of Workshop Deliverables: University shall own and retain all rights, including copyrights, in all course materials and other works prepared by University under this Agreement.
- H. Immediately subsequent to delivery of each training session, Contractor will gather participant feedback from 90% of participants on training format, delivery and content. Contractor will use evaluation forms approved by SFHSA.
- I. Training topics will include:
  - Strength-Based Communication & Case Management
  - Coaching Through Resistance/Crisis
  - Assessment and Case Management
  - Trauma-Informed Case Coordination
  - Reflective Supervision
  - Professional Boundaries
  - Vicarious Trauma and Self-care
  - Effects of Toxic Stress on Executive Function
  - Motivational Interviewing
  - Client Goal Setting Techniques
  - Supervision as an interactive, collaborative and supportive partnership with line staff
  - Service Excellence Culture; Internal and External Customers (focus on soft skills)
  - Effective Welfare to Work Case Management
  - Continuous Quality Improvement
  - Problem Solving
  - Psychological Safety
  - Interactive Interviewing
  - Emotional Intelligence
  - Effective Communication
  - Personal and Professional Growth
  - Engaging and Empowering families
  - Adult Learning Principles
  - Others TBD in conjunction with SFHSA

**V. SFHSA Responsibilities**

- A. SFHSA will work with the Contractor to collaboratively develop the training design, curriculum content and training delivery method.
- B. SFHSA and Contractor will collaboratively establish training dates and times. SFHSA will secure training sites in San Francisco for the Contractor as needed.
- C. SFHSA will assess staff training needs and refer training participants to the trainings in accordance with these identified needs.

D. SFHSA staff trainer will participate with Contractor during trainings in order to integrate materials into ongoing induction and in-service trainings.

**VI. Location and Time of Services**

Trainings will occur on a schedule to be jointly determined by SFHSA and Contractor. The trainings will be delivered in whole or partial-day sessions in San Francisco, depending on the topics, at the Agency's facilities or virtually.

**VII. Service Objectives**

On an annual basis provide up to 30 training days onsite in San Francisco, or virtually if needed, to as many as 35 staff persons per training session. In-person trainings are preferred.

**VIII. Outcome Objectives**

At least 85% of participants who complete the initial evaluation form will indicate that the training effectively provided helpful information and social work tools for working with the CalWORKs and FaR populations.

**IX. Reporting Requirements**

- A. Provide monthly evaluation reports to SFHSA, due no later than the tenth day of the following month.
- B. Provide evaluation and attendance reports to SFHSA including written summaries of participant evaluations, due no later than the tenth day of the month following the date of the training.

- A. For assistance with reporting requirements or submission of reports, contact:  
Leslie Lau, Contract Manager, GB11  
Office of Contract Management  
leslie.lau1@sfgov.org  
or  
Ken Ho, Community Services Program Monitor, E309  
Welfare-to-Work Services Division  
ken.ho@sfgov.org

**Appendix B-1 – Calculation of Charges  
University of California, Davis  
Social Work and Related Skills Training  
Term: 7/1/2024-6/30/2028**

**I. Method of Payment**

Contractor shall submit monthly invoices by the fifteenth (15<sup>th</sup>) working day of each month, based upon the number of units of service that were delivered in the immediately preceding month. All training days associated with the Services listed in Appendix A, times the unit rate as shown in the Fee Schedule listed below shall be reported on the invoice(s) each month.

**II. Fee Schedule and Final Invoice**

- a. Rate per training day: \$4,250
- b. Total number of training days per year: 30 full days
- c. \$4,250 rate per training day x 30 days of training = \$127,500 annually
- d. **The total contract amount for the period of July 1, 2024 to June 30, 2028 is \$510,000.**
- e. **Contingency Amount is \$51,000.**
- f. **The total not to exceed amount including contingency is \$561,000.**
- g. Contractor understands that, of the maximum dollar obligation listed in Article 3.3.1 of this Agreement, **\$51,000** is included as a contingency amount and is neither to be used in Calculation of Charges attached to this agreement, nor available to Contractor without a modification to this Agreement executed in the same manner as this Agreement or a revision to the Calculation of Charges (Appendix B), which has been approved by Contract Administrator. Contractor further understands that no payment of any portion of this contingency amount will be made unless and until such modification or budget revision has been fully approved and executed in accordance with applicable City and Human Services Agency laws, regulations and policies/procedures and certification as to the availability of funds by Controller. Contractor agrees to fully comply with these laws, regulations, and policies/procedures.
- h. A final closing invoice, clearly marked “FINAL,” shall be submitted no later than sixty (60) calendar days following the closing date of the Agreement, and shall include only those Services rendered during the referenced period of performance. If Services are not invoiced during this period, all unexpended funding set aside for this Agreement will revert to City. City’s final reimbursement to the Contractor at the close of the Agreement period shall be adjusted to conform to actual units certified multiplied by the unit rates identified in the Calculation of

Charges attached hereto, and shall not exceed the total amount authorized and certified for this Agreement.



**Appendix A: Scope of Services to be Provided**  
**University California, Davis**  
**Welfare Fraud Detection and Prevention Training**  
**Term: 7/1/2024-6/30/28**

**I. Purpose of Contract**

The purpose of the contract is to provide Welfare Fraud Detection and Prevention Technique trainings for approximately 800 San Francisco Human Services Agency eligibility workers and non-eligibility staff/investigators across programs.

**II. Definitions**

SF-HSA – San Francisco Human Services Agency

**III. Target Population**

The target population is San Francisco Human Services Agency eligibility workers, non-eligibility staff, and investigators.

**IV. Description of Services**

**Contractor shall provide the following services during the term of this contract:**

Welfare Fraud Detection and Prevention Technique Trainings: Contractor will provide state mandated Welfare Fraud Detection and Prevention Technique trainings that can help workers prevent fraud by educating clients, conducting thorough interviews, completing legal forms, and following standard procedures.

Training topics will include:

- the worker’s role in fraud prevention and detection
- interview techniques for thorough eligibility determination
- inconsistencies and other fraud indicators
- fraud detection resources

As a result of this training session, participants increase their ability to detect fraud and help clients avoid fraud.

Key Eligibility Factors for Welfare Fraud Investigators: Familiarity of key factors of eligibility is essential to the completion of a thorough and effective investigation of potential welfare fraud. The training session will review these factors.

Training Topics will include:

- household composition
- resources

- income
- verification
- reporting requirements

Participants of the training session will gain a greater understanding of federal and state requirements that govern the CalWORKs, CalFresh, and Medi-Cal programs to assist them in their role of ensuring correct and accurate benefits are being issued to applicants and recipients of aid.

#### **V. Location and Time of Services**

The training will be delivered either via online modules or via half-day workshops at the agency's facilities, as determined and agreed by HSA and UC Davis dependent on planning, scheduling, and resource availability.

Online modules will be conducted in a four-hour self-paced session through the UC Davis Learning Management System (LMS). Participants can access the training via their work computers.

Half-day workshop sessions will be hosted at the agency's facilities. Each workshop will allow up to 30-35 participants and will be hosted by the same instructor in two consecutive half-day session hours at 8:00 AM – 12:00 PM and 1:00PM – 5:00PM.

#### **VI. Service Objectives**

Contractor will provide welfare fraud trainings to 800 eligibility and non-eligibility staff/investigators.

#### **VII. Outcome Objectives**

An online post-training test will be administered at the end of trainings with a minimum of 80% of participants demonstrating a basic knowledge of welfare fraud and fraud detection.

#### **VIII. Reporting Requirements**

- A. Provide monthly evaluation reports to HSA during follow-up consulting, due no later than the tenth day of the following month.
- B. For assistance with reporting requirements or submission of reports, contact:

Leslie Lau HSA Contract Manager, Office of Contract Management  
Email: Leslie.Lau1@sfgov.org

- or -

Rosa Ortiz  
Learning & Organizational Development Manager  
Email: [rosa.ortiz@sfgov.org](mailto:rosa.ortiz@sfgov.org)

**Appendix B – Calculation of Charges**  
**University of California, Davis**  
**Welfare Fraud Detection and Prevention Training**  
**Term: 7/1/2024-6/30/2028**

**1. Method of Payment**

Contractor shall submit monthly invoices by the fifteenth (15<sup>th</sup>) working day of each month, based upon the number of units of service that were delivered in the immediately preceding month. All trainings associated with the Services listed in Appendix A, times the unit rate based on the delivery method as shown in the Fee Schedule listed below shall be reported on the invoice(s) each month.

**2. Fee Schedule**

Online Module Pricing Structure

- a. 35 online users cost \$2,125 per half-day training unit
- b. Total number of online users: 800 users
- c. Total number of training units needed for 800 users = 22 half-day training unit
- d. \$2,125 per TU x 22 half day = \$46,750 annually for 800 online users.

– or –

Instructor-Led Workshop Pricing Structure

- a. Rate per half-day training session: \$2,125 (or \$4,250 per full day session)
- b. Total number of training days for 800 participants: 22 half-day sessions (or 11 full days)
- c. \$2,125 rate per half-day training x 22 half-day sessions = \$46,750 annually

**3. Contract Total**

- **The annual amount is \$46,750 per fiscal year. The total contract amount for the period of July 1, 2024 to June 30, 2028 is \$187,000.**
- **Contingency Amount is \$18,700.**
- **The total not to exceed amount including contingency is \$205,700.**
- Contractor understands that, of the maximum dollar obligation listed in Article 3.3.1 of this Agreement, **\$18,700** is included as a contingency amount and is neither to be used in Calculation of Charges attached to this agreement, nor available to Contractor without a modification to this Agreement executed in the same manner as this Agreement or a revision to the Calculation of Charges (Appendix B), which has been approved by

Contract Administrator. Contractor further understands that no payment of any portion of this contingency amount will be made unless and until such modification or budget revision has been fully approved and executed in accordance with applicable City and Human Services Agency laws, regulations and policies/procedures and certification as to the availability of funds by Controller. Contractor agrees to fully comply with these laws, regulations, and policies/procedures.

- A final closing invoice, clearly marked “FINAL,” shall be submitted no later than sixty (60) calendar days following the closing date of the Agreement, and shall include only those Services rendered during the referenced period of performance. If Services are not invoiced during this period, all unexpended funding set aside for this Agreement will revert to City. City’s final reimbursement to the Contractor at the close of the Agreement period shall be adjusted to conform to actual units certified multiplied by the unit rates identified in the Calculation of Charges attached hereto, and shall not exceed the total amount authorized and certified for this Agreement.