



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

Department of Benefits
and Family Support

Department of Disability
and Aging Services

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org



London Breed
Mayor

Trent Rhorer
Executive Director

TO:	HUMAN SERVICES COMMISSION										
THROUGH:	TRENT RHORER, EXECUTIVE DIRECTOR										
FROM:	ANNA PINEDA, DEPUTY DIRECTOR FOR ECONOMIC SUPPORT AND SELF-SUFFICIENCY ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS										
DATE:	APRIL 19, 2024										
SUBJECT:	NEW GRANT: 211 SAN DIEGO (NON-PROFIT) for CALFRESH AND MEDI-CAL TELEPHONIC APPLICATION ASSISTANCE 24-28										
GRANT TERM:	07/01/2024 – 06/30/2028										
GRANT AMOUNT:	<table border="0"> <tr> <td><u>New</u></td> <td><u>Contingency</u></td> <td><u>Total</u></td> <td></td> <td></td> </tr> <tr> <td>\$1,539,833</td> <td>\$153,983</td> <td>\$1,693,817</td> <td></td> <td></td> </tr> </table>	<u>New</u>	<u>Contingency</u>	<u>Total</u>			\$1,539,833	\$153,983	\$1,693,817		
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The Human Services Agency (HSA) requests authorization to enter into a new grant agreement with 211 San Diego for the period of July 1, 2024 to June 30, 2028 in the amount of \$1,539,833 plus a 10% contingency for a total amount not to exceed \$1,693,817. The purpose of this grant is for the provision of high-volume telephone contact to likely eligible CalFresh and Medi-Cal residents of San Francisco County, assist in generating CalFresh and Medi-Cal applications, and support existing recipients in maintaining their benefits to reduce churn.

Background

One out of four San Francisco residents faces food insecurity, meaning they struggle with poor nutrition or insufficient caloric intake. These problems of inadequate nutrition then lead to poor health outcomes. The purpose of this grant is to reduce hunger and improve health in San Francisco. Currently, thousands of San Franciscans likely eligible for CalFresh and Medi-Cal are not receiving benefits.

211 San Diego’s work is renowned for being cutting-edge and highly effective, often cited as a “best practice” for CalFresh client engagement. Currently working in five counties conducting CalFresh benefits linkages, 211 San Diego remains equipped with sophisticated technology to continue handling high volume telephonic application assistance campaigns in San Francisco County.

Services to be Provided

Grantee will prepare and execute telephone-based campaigns that involve CalFresh and Medi-Cal application assistance and benefit maintenance. SFHSA will provide Grantee with lists of individuals requiring application assistance and/or renewal support. Grantee will contact up to 2,000 clients per month. Applications submitted by the Grantee will be processed and reviewed by CalFresh/Medi-Cal Eligibility Workers.

Grantee will deliver all benefits linkages materials, communication and correspondence in to the following languages: Cantonese (Chinese), Spanish, and English. Grantee will communicate over the phone, mail, email, and/or text with clients. In partnership with HSA, Grantee will employ a data-driven approach to increase CalFresh and Medi-Cal enrollment and reduce churn, and will continually refine business processes, strategy, and implementation. Grantee will track and report benefits linkages data on a monthly basis to HSA, and will record and store all calls.

Location

Telephone benefits linkages services will take place at 211 San Diego’s headquarters in San Diego, CA, which operates a virtual over-the-phone environment with technical capacity to expand the number of clients served at any given time. The office is open from 7:00 AM to 6:30 PM daily. Attempts to contact clients for San Francisco County campaigns may include evening and weekend hours.

Selection

Grantee was selected through RFP #1133 issued in March 2024.

Funding

Funding for this grant is provided by local, state, and federal funds.

ATTACHMENTS

Appendix A – Services to be Provided

Appendix B – Program Budget

Appendix A: Scope of Services to be Provided
211 San Diego
CalFresh & Medi-Cal Telephonic Application Assistance
July 1, 2024 – June 30, 2028

I. Purpose of Grant

Provide high-volume telephone contact to likely eligible CalFresh and Medi-Cal residents of San Francisco County, assist in generating CalFresh and Medi-Cal applications, and support existing recipients in maintaining their benefits to reduce churn (i.e. completing their SAR7 form).

II. Target Population

The target populations include persons who may be eligible for CalFresh and/or Medi-Cal, but who are not currently enrolled, as well as persons who are currently enrolled but at risk of being discontinued and need support to remain on benefits.

III. Description of Services

Grantee shall provide the following services during the term of this grant:

- A.** Use sophisticated telephone system with the following minimum capabilities: high-volume, automated dialing, voice file, telephonic signature.
- B.** Prepare and execute high-volume telephone-based campaigns that involve CalFresh and Medi-Cal application assistance and benefit maintenance.
- C.** When performing phone-based application assistance, grantee shall contact the customer at the agreed upon appointment time to assist households in completing the application or renewal through the public web portal, BenefitsCal.org. Utilizing a Community-Based Organization (CBO) Manager or Assistor account, project staff will complete the application or renewal while using grantee's phone system to automatically record calls for monitoring and legal purposes.
- D.** Grantee will record a telephonic signature on behalf of the client. Project staff will save the voice file and telephonic signature to the grantee's file storage system, submitting to SFHSA upon request. Grantee will retain the telephonic signatures for a period of 3 years, per SFHSA & state regulation (ACIN I-60-13).
- E.** Customers who submit applications will be provided with a checklist of documents generally required to be submitted in order for the SFHSA to determine final eligibility. The checklist can be emailed or mailed to the client, based on their preference. Grantee may use information collected from read-only access to CalSAWS partner account journal entries to determine which documents are missing and to provide assistance with submitting documents if needed.
- F.** Campaigns will often involve the grantee receiving from SFHSA a list(s) of clients to contact for application assistance or case maintenance support. List(s) are generated

via the CalSAWS database and shared following SFHSA Secure File Transfer Protocol. Depending on communication type, clients give consent before being contacted by Grantee. Upon receipt of a list(s) Grantee shall, if deemed appropriate, research cases in CalSAWS (via a limited view, read-only account) prior to phoning clients to ensure data remains accurate, improving overall outcomes.

- G.** After first attempt where grantee leaves a voicemail, grantee shall provide three follow-up attempts per client (two phone calls and one email or text) in a reasonable cadence within the campaign window.
- H.** Grantee will check the outcomes of all submissions. If a submission is denied, grantee will identify the reason and attempt to rectify by following up with the client.
- I.** For applicable campaigns, grantee will provide SFHSA with a list of customers with disconnected/wrong telephone numbers and email addresses that were undeliverable.
- J.** Juggle one or more campaigns at any given time and have the ability to pivot to new campaigns in a nimble manner.
- K.** Identify the most efficient and effective strategies for client engagement.
- L.** Review and/or edit letters/correspondence informing clients of potential eligibility for CalFresh and/or Medi-Cal benefits and advising that Grantee will be calling about an upcoming campaign. SFHSA will provide collateral material (i.e. postcards, letterhead, etc.) and handle mailings. Customers have shown a greater willingness to work with Grantee when letters are mailed out in advance of phone calls, improving overall outcomes.
- M.** Ability to work evening and weekend hours to reach customers who may not be available during regular business hours.

IV. Location and Time of Services

Telephone benefits linkages services will take place at 211 San Diego's headquarters in San Diego, CA, which operates a virtual over-the-phone environment with technical capacity to expand the number of clients served at any given time. The office is open from 7:00 AM to 6:30 PM daily. Attempts to contact clients for San Francisco County campaigns may include evening and weekend hours, as directed by SFHSA.

V. Service & Outcome Objectives

A. Service Objectives

- 1.** Perform high-volume telephone assistance to likely eligible CalFresh and Medi-Cal residents in San Francisco County and assist in generating CalFresh and Medi-Cal applications for them. Utilize a variety of communication methods to engage likely eligible individuals (i.e. email, mail, and text).
 - Outbound contact: Establish mail/phone contacts with an agreed upon priority population (limited, read-only database access provided by SFHSA). If clients are nonresponsive, vendor will call twice and email or text once.

- Inbound Contact: Receive inbound calls from priority population. Approximately 80% of inbound calls to the vendor to be answered within five minutes, with an embedded callback option and informational recordings about CalFresh and Medi-Cal benefits played while callers are on-hold
 - Application Support: Engage clients by phone and complete online CalFresh and/or Medi-Cal applications on their behalf via Benefitscal.com. Applications require certain identifiers be entered before submission to avoid potential fraud. SFHSA eligibility workers then assess and verify all applications submitted are legitimate using the CalSAWS system. SFHSA eligibility workers also conduct intake interviews with applicants.
 - Application follow-through: Define for the client what supporting documents are needed and provide follow-up support in gathering them (likely to include contact by phone/email/mail).
2. Assist existing CalFresh and Medi-Cal recipients in maintaining their benefits to reduce churn. Provide support to clients who have already been discontinued from CalFresh/Medi-Cal benefits in reapplying for aid.
 - Provide assistance to CalFresh and Medi-Cal recipients in completing and submitting their SAR 7 report and other recertification forms.
 - Refer customers to relevant resources as needed.
 3. Deliver all communications, informational materials, and other correspondence in at least three languages: Cantonese (Chinese), Spanish, and English. Communications (i.e. phone calls, email, mail, etc.) to be provided in at least three languages by Grantee to minimize the use of third party interpreters.
 4. Engage in a data-driven approach to increase CalFresh/Medi-Cal enrollment and assist recipients in maintaining benefits to reduce churn. Continually refine the business processes, strategies, and implementation, as needed.
 - Monthly and annual program monitoring meetings
 - Respond to email correspondence within 24 hours
 5. Track and report campaign data on a monthly basis to SFHSA. The organization must record all calls and store them in a way that is easily retrievable.

Data to include (broken down by language):

- Number of cases assigned
- Number of calls made/received
- Number of cases where calls were not attempted
- Number of cases where calls were attempted but did not connect
- Reasons why calls were not attempted
- Reasons why calls did not connect
- Calls answered
- Voice messages left
- Inbound call wait time
- Number of follow-up attempts and methods

- Qualitative feedback on strengths, challenges, and strategies to overcome weaknesses in campaigns or business processes

The following data elements may also apply, depending on campaign type:

- Applications started
- Applications submitted
- Applications approved
- Applications denied
- Approval rate %
- Reasons why applications or SAR 7 or other related forms were not completed/submitted
- Breakdown of application or renewal support rendered by language

B. Outcome Objectives

1. Conduct a minimum of some combination of 24,000 application support and/or renewal assistance phone calls per fiscal year (or 2,000/month).
2. Grantee will make contact with 2,000 clients per month. Grantee will attempt phone contact with, leave voicemail, email, and/or text all assigned cases (contingent upon accuracy/validity of contact information provided by SFHSA).
3. After initial phone contact and voicemail attempt, grantee will make at least 3 follow-up attempts within the campaign window:
 - 1st follow-up attempt: phone
 - 2nd follow-up attempt: phone
 - 3rd follow-up attempt: email (if available, otherwise text message if appropriate)
4. Grantee will educate and inform (where appropriate) households on available resources and necessary verifications to support the application assistance and benefit maintenance process.
5. For any application support-related campaigns: Of all application phone call attempts where a successful connection was made, grantee will assist 40% of households with submitting a complete application.
6. For any renewal assistance-related campaigns: Of all renewal phone calls where a successful connection was made, grantee will assist 50% of households with completing the submission of a periodic report.
7. For campaigns that involve the submission of CalFresh and/or Medi-Cal applications, grantee will achieve 60% approval rating per month.
8. For campaigns that involve the submission of renewal forms (Semiannual and Re-certifications), grantee will achieve 80% approval rating per month.

VI. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Service and Outcome Objectives above. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
- B. Grantee will provide an **annual** report summarizing the grant activities, referencing the tasks as described in Service and Outcome Objectives above. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- C. Grantee will provide Ad Hoc reports on a timely basis as required by SFHSA.
- D. For assistance with reporting requirements or submission of reports, contact:

Jennifer.Grant@sfgov.org
Senior Contracts Manager, Office of Contract Management

or

Ana.Marie.Lara@sfgov.org
Community Engagement Manager

VII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Agency Name: 211 San Diego

Grant Term: 7/1/24 - 6/30/28

(Check One) New Renewal Modification Internal Revision

If modification, Effective Date:

Modification No.:

Program Name: CalFresh & Medi-Cal Telephone Assistance

	FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total
	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
Expenditures					
Salaries & Benefits	\$ 286,461	\$ 294,870	\$ 300,099	\$ 305,513	\$ 1,186,943
Operating Expenses	\$ 36,014	\$ 37,280	\$ 38,693	\$ 40,055	\$ 152,042
Subtotal	\$ 322,475	\$ 332,150	\$ 338,792	\$ 345,568	\$ 1,338,985
Indirect Percentage (%)	15%	15%	15%	15%	
Indirect Costs (Line 16 X Line 15)	\$ 48,371	\$ 49,822	\$ 50,819	\$ 51,835	\$ 200,848
Capital Expenses					
Total Expenses	\$ 370,846	\$ 381,972	\$ 389,611	\$ 397,403	\$ 1,539,833
HSA Revenues					
Total HSA Revenues	\$ 370,846	\$ 381,972	\$ 389,611	\$ 397,403	\$ 1,539,833
Other Program Revenues					
Total Other Program Revenues					

Prepared by: Suzie Bechtol

Telephone No.:

Date: 4/12/24

Agency Name: 211 San Diego
 Program Name: CalFresh & Medi-Cal Telephone Assistance

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		FY 24/25	FY 25/26	FY 26/27	FY 27/28	Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
Enrollment Center Specialists	\$ 43,900	4.00	100%	4.00	\$ 175,600	\$ 180,868	\$ 186,294	\$ 191,883	\$ 734,645
Enrollment Ctr Program Coordinator	\$ 50,600	1.00	6%	0.06	\$ 3,036	\$ 3,127	\$ 3,221	\$ 3,318	\$ 12,702
Supervisor, Enrollment Center	\$ 72,200	1.00	24%	0.24	\$ 17,328	\$ 17,848	\$ 18,383	\$ 18,934	\$ 72,493
Manager, Enrollment Ctr Programs	\$ 78,100	1.00	18%	0.18	\$ 14,058	\$ 14,339	\$ 12,030	\$ 9,672	\$ 50,099
Chief Programs Officer	\$ 190,500	1.00	2%	0.02	\$ 3,810	\$ 3,924	\$ 4,042	\$ 4,163	\$ 15,939
Data Analyst	\$ 79,600	1.00	4%	0.04	\$ 3,184	\$ 3,280	\$ 3,378	\$ 3,479	\$ 13,321
TOTALS	\$ 514,900	9.00	154%	4.54	\$ 217,016	\$ 223,386	\$ 227,348	\$ 231,449	\$ 899,199
FRINGE BENEFIT RATE	32%								
EMPLOYEE FRINGE BENEFITS					\$ 69,445	\$ 71,484	\$ 72,751	\$ 74,064	\$ 287,744
TOTAL SALARIES & BENEFITS					\$ 286,461	\$ 294,870	\$ 300,099	\$ 305,513	\$ 1,186,943

Agency Name: 211 San Diego
Program Name: CalFresh & Medi-Cal Telephone Assistance

Operating Expenses Detail

<u>Expenditure Category</u>	<u>FY 24/25</u>	<u>FY 25/26</u>	<u>FY 26/27</u>	<u>FY 27/28</u>	<u>Total</u>
	<u>7/1/24 - 6/30/25</u>	<u>7/1/25 - 6/30/26</u>	<u>7/1/26 - 6/30/27</u>	<u>7/1/27 - 6/30/28</u>	<u>7/1/24 - 6/30/28</u>
Rental of Property	\$ 8,100	\$ 8,505	\$ 8,930	\$ 9,377	\$ 34,912
Utilities(Elec, Water, Gas, Phone, Garbage)	\$ 19,100	\$ 19,673	\$ 20,263	\$ 20,871	\$ 79,907
Office Supplies, Postage	\$ 200	\$ 200	\$ 250	\$ 250	\$ 900
Building Maintenance Supplies and Repair	\$ 400	\$ 412	\$ 424	\$ 437	\$ 1,673
Printing and Reproduction					
Insurance	\$ 2,000	\$ 2,100	\$ 2,205	\$ 2,315	\$ 8,620
Staff Training	\$ 214	\$ 210	\$ 256	\$ 249	\$ 929
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE					
ICE Cybersecurity	\$ 1,100	\$ 1,133	\$ 1,167	\$ 1,202	\$ 4,602
OTHER					
Software Licenses	\$ 4,900	\$ 5,047	\$ 5,198	\$ 5,354	\$ 20,499
TOTAL OPERATING EXPENSE	\$ 36,014	\$ 37,280	\$ 38,693	\$ 40,055	\$ 152,042