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SAN FRANCISCO
HUMAN SERVICES AGENCY

MEMORANDUM

TO:	DISABILITY AND AGING SERVICES COMMISSION
THROUGH:	KELLY DEARMAN, EXECUTIVE DIRECTOR
FROM:	CINDY KAUFFMAN, DEPUTY DIRECTOR ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS DS
DATE:	JUNE 4, 2025
SUBJECT:	NEW CONTRACT: **CLARITY SOCIAL RESEARCH GROUP** (FOR-PROFIT) FOR PROVISION OF 2026 DIGNITY FUND COMMUNITY NEEDS ASSESSMENT – COMMUNITY SURVEY & COMMUNITY FACILITATION Full Term
CONTRACT TERM:	6/1/25-3/31/26
CONTRACT AMOUNT:	$198,000
ANNUAL AMOUNT:	See table below

FUNDING SOURCE:	County	State	Federal	Contingency	Total
	$198,000				$198,000
PERCENTAGE:	100%				100%

The San Francisco Department of Disability and Aging Services (DAS) requests authorization to enter into new contract agreements with Clarity Social Research Group for the period of June 1, 2025 through March, 31 2026, in the not to exceed amount of $198,000. The purpose of these contracts is to provide consultant services to conduct select community research activities in support of the 2026 Dignity Fund Community Needs Assessment.

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Service	Term	Not to Exceed
Community Survey	6/1/25-3/31/26	$99,000
Community Facilitation	6/1/25-3/31/26	$99,000
	Total	**$198,000**

Background

SFHSA's Department of Disability and Aging Services (DAS) plans and administers a variety of federal, state and local programs to assist older adults, veterans, people with disabilities, and their families to maximize safety, health, and independence. We directly provide and also partner with dozens of community-based organizations to offer services that support these populations to safely live and engage in the community for as long as possible and maintain the highest quality of life.

In November 2016, San Francisco voters approved an amendment to the Charter of the City and County of San Francisco to establish the Dignity Fund, a protected funding source for social services that support older people, adults with disabilities, veterans, and caregivers. The goal of the Fund is to ensure that people are provided the opportunity to age with dignity and strengthen the community-based support network across the city. The amendment sets a baseline annual funding level of $38 million and requires annual contributions by the City to increase the Fund in accordance with an outlined schedule. The Fund is overseen by the Dignity Fund Oversight and Advisory Committee (OAC), a civilian oversight body that develops recommendations for DAS on administration of the Fund; in turn, the OAC is advised by a Service Provider Working Group (SPWG) regarding funding priorities, policy development, and any other issues of concern.

This legislation also mandates a four-year planning and funding cycle. The cycle begins with the Dignity Fund Community Needs Assessment (DFCNA), a robust community needs assessment process to understand needs, assess equity and service gaps, and develop recommendations for the upcoming years. In the subsequent year, the DFCNA findings are used in creating a Services and Allocation Plan, which outlines how the Fund will be used over the following four years to address community needs. The first DFCNA project was completed in 2018.

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The 2026 Dignity Fund Community Needs Assessment (DFCNA) is a collaborative effort involving multiple leads and stakeholders. While consultant services will be engaged to carry out key community research activities—specifically the community survey and community facilitation components—other critical parts of the DFCNA process will be managed internally. This includes the equity analysis, report development, and community outreach coordination, which will be led by the Department of Disability and Aging Services (DAS), San Francisco Human Services Agency (SFHSA) Planning, SFHSA Communications, and other partners. Together, these teams will oversee the comprehensive needs assessment to ensure the findings inform strategic allocation and service planning. Further details on project roles and responsibilities are outlined in the attached draft project plan (Appendix C).

Services to be Provided

Consultant services are required to complete select community research activities in support of the 2026 Dignity Fund Community Needs Assessment (DFCNA). The DFCNA will help DAS to understand current community needs, identify equity concerns and service gaps, and develop recommendations to address these issues. This information will be used in the following year to develop a Services and Allocation Plan that outlines how the Fund will be allocated strategically to strengthen the city's aging and disability service network. As required by the City Charter, this needs assessment must be conducted and completed in FY 2025-26.

To support this effort, DAS seeks to contract with Clarity Social Research Group to provide the following services:

1. Community Survey

The Contractor will design and implement a comprehensive community survey to gather input from older adults, adults with disabilities, caregivers, veterans, and service providers regarding community needs, experience accessing and participating in services, and other topics relevant for this assessment. Key responsibilities include:

- **Document review and planning:** Review prior needs assessment reports and related materials to inform survey methodology and finalize a Community Survey Analytical Plan.
- **Survey design and implementation:** Develop and deploy a survey using multiple sampling methods, including both convenience and randomized address-based sampling, to engage a broad and representative sample of community members.

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- **Survey translation:** Translate the survey into multiple threshold languages to improve language accessibility.
- **Data monitoring and reporting:** Track survey response rates and demographic representation throughout the field period and analyze collected quantitative and qualitative data. Prepare a comprehensive report summarizing survey findings, along with presentation materials for the Oversight and Advisory Committee (OAC).

Deliverables include a Community Survey Analytical Plan and related presentation to the OAC, weekly monitoring reports during active data collection, a draft report of findings, a final report with technical appendices and related presentation materials, and copies of supporting research materials and documentation.

2. Community Facilitation

The Contractor will design and facilitate a series of community engagement sessions to gather qualitative input on community needs and experiences.

Key responsibilities include:

- **Document review and planning:** Review prior needs assessment reports and related materials to inform facilitation strategies and finalize a Community Facilitation Analytical Plan.
- **Community forums:** Facilitate 12 community forums (11 in-person, one per supervisorial district, and one virtual citywide) to gather broad qualitative input from community members and service providers.
- **Focus groups:** Conduct 10 focus groups (five in-person, five virtual) to capture in-depth perspectives from specific populations and issue areas identified in collaboration with DAS.
- **Data analysis and reporting:** Analyze qualitative data to identify key themes, trends, and community priorities. Prepare a comprehensive report summarizing the findings from all community forum and focus group sessions, along with presentation materials for the OAC.

Deliverables include a Community Facilitation Research Plan and related presentation to OAC, notes and demographic data from all sessions, a draft report of findings, and a final report with technical appendices and related presentation materials.

Further details regarding the scope of services, budget, deliverables, and timelines for each contract are included in the corresponding appendices.

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Location

The Contractor shall perform the majority of its work at its offices located at 5440 Manila Avenue, Oakland, CA 94618. When required, the Contractor will coordinate directly with Department staff by participating in in-person meetings and facilitating community engagement activities at locations designated by the Department.

Selection

For Community Survey, the contractor was selected through IB #1184 issued in March 2025.

For Community Facilitation, there were no responses to IB #1183 issued in March 2025. Therefore, the department reached back out to the vendors who were initially contacted through the IB process as well as to Clarity Social Research Group who had submitted a proposal for IB #1184, demonstrating that it met the minimum requirements for IB #1183. Ultimately, Clarity Social Research Group best met the needs of the department and was selected for the award of the contract.

Funding

Funding for these contracts is provided through County General Funds.

ATTACHMENTS

Appendix A, Services to be Provided – 2026 DFCNA Community Survey
Appendix B, Calculation of Charges – 2026 DFCNA Community Survey

Appendix A, Services to be Provided – 2026 DFCNA Community Facilitation
Appendix B, Calculation of Charges – 2026 DFCNA Community Facilitation

Appendix C, 2026 Dignity Fund Community Needs Assessment Project Plan

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Appendix A: Services to be Provided
Clarity Social Research Group (Clarity)
2026 Dignity Fund Community Needs Assessment – Community Survey
June 1, 2025 – March 31, 2026

I. Purpose

The San Francisco Human Services Agency's (SFHSA) Department of Disability and Aging Services (DAS) plans and administers a variety of federal, state and local programs to assist older adults, veterans, people with disabilities, and their families to maximize safety, health, and independence. We directly provide and partner with community-based organizations to offer services that support these populations to safely live and engage in the community for as long as possible and maintain the highest quality of life. The purpose of this contract is to provide contractor services to conduct the Community Survey component of the Dignity Fund Community Needs Assessment (DFCNA).

II. Background

In November 2016, San Francisco voters approved an amendment to the Charter of the City and County of San Francisco establishing the Dignity Fund, a protected funding source for social services that support older adults, adults with disabilities, veterans, and caregivers. The purpose of the Fund is to help individuals age with dignity while strengthening the network of community-based services throughout the city.

The legislation set a baseline annual funding level of $38 million, with scheduled increases over time. The City was required to increase the Fund by $6 million in Fiscal Year (FY) 2017-18, followed by annual increases of $3 million through FY 2026-27. Beginning in FY 2027-28, the Fund will continue at that level, with annual adjustments based on changes in the City's aggregate discretionary revenues, through FY 2036-37.

In addition, the legislation established a four-year planning and funding cycle. Each cycle begins with the Dignity Fund Community Needs Assessment (DFCNA), a comprehensive assessment process designed to identify community needs, assess equity and service gaps, and develop recommendations to respond to these issues. In the following year, the findings from the DFCNA inform the development of a Services and Allocation Plan (SAP), which outlines how Dignity Fund resources will be allocated over the next four years to address identified needs. The first DFCNA was completed in 2018.

The 2026 Dignity Fund Community Needs Assessment (DFCNA) will initiate the third Dignity Fund planning and funding cycle. In accordance with the Dignity Fund Charter amendment, the assessment must be conducted and completed in FY 2025-26.

The 2026 DFCNA will employ a combination of quantitative and qualitative data collection and analysis, including review of demographic and population data, program administrative data, and data gathered through community research activities. This analysis will help the Department of Disability and Aging Services (DAS) to understand

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current community needs, identify equity concerns and service gaps, and support the development of recommendations for future service delivery and funding priorities.

To implement the community research components of the DFCNA, DAS sought contractor services for two key activities: (1) a Community (Population) Survey and (2) Community Facilitation. The Human Services Agency (HSA) and DAS issued a solicitation through the City's Informal Bid process. Following a competitive procurement, Clarity Research Social Group was selected to conduct the Community Survey component.

Appendix C includes a draft project plan for the 2026 Dignity Fund Community Needs Assessment (DFCNA). The final project plan will be presented for review and discussion at the July 21, 2025 meeting of the Dignity Fund Oversight and Advisory Committee (OAC).

III. Definitions

CARBON: Contracts Administration Reporting & Billing Online database

CBO: Community Based Organization

CITY: City and County of San Francisco, a municipal corporation

CONTRACTOR: Clarity Social Research Group

DAS: Department of Disability and Aging Services

DF: Dignity Fund

DFCNA: Dignity Fund Community Needs Assessment

OAC: Oversight and Advisory Committee of the Dignity Fund

OCM: Office of Contract Management, Human Services Agency

OCP: Office of Community Partnerships

SAP: Services and Allocation Plan

SFHSA: San Francisco Human Services Agency

IV. Target Population

All residents of San Francisco that are eligible for services from the Department of Disability and Aging Services; those that are older adults aged 60 or older and individuals ages 18-59 with a disability(ies), including those with the greatest economic and / or social need.

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V. Description of Services

The Contractor will assist the San Francisco Department of Disability and Aging Services (DAS) in designing and implementing the 2026 Dignity Fund Community Needs Assessment (DFCNA) – Community Survey. This work will include document review, survey design and implementation, facilitation of community engagement activities, data collection and analysis, and reporting of findings.

The scope of work includes the following components:

Component A: Project Kickoff and Plan (June – July 2025)

The Contractor will coordinate with DAS to officially launch the project and begin planning major project activities, such as the community survey. Responsibilities include:

- Convening an initial meeting with DAS to kick off the project and confirm a shared understanding of the project goals, roles, and responsibilities, timeline, activities, and deliverables.

- Reviewing relevant existing documents, including prior DFCNA analytic plans and final reports, other reports related to the implementation and outcomes of activities supported by the Dignity Fund, and any other materials identified by DAS to establish a foundation for this year's needs assessment.

- Facilitating stakeholder mapping to identify key populations and audiences of interest, and to support development of survey outreach and recruitment strategy, in alignment with the draft 2026 DFCNA project plan and timeline provided by DAS.

- Developing a **Community Survey Analytical Plan** that outlines the proposed approach to survey outreach and recruitment, sampling methodology, data collection, analysis, and reporting. The plan will include timeline benchmarks and required resources for key project activities. The Community Survey Analytical Plan will inform the finalized 2026 DFCNA Project Plan to be prepared by DAS.

- Presenting the Community Survey Analytical Plan to the Dignity Fund Oversight and Advisory Committee (OAC), along with the overarching 2026 DFCNA Project Plan to be presented by DAS.

Deliverables:

- Community Survey Analytical Plan (June 2025)
- Presentation of Community Survey Analytical Plan to OAC (July 2025)

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Component B: Population Survey (July-October 2025)
The Contractor will design and administer a population survey to gather input from older adults, adults with disabilities, veterans, caregivers, and service providers regarding community needs, service access, consumer experiences participating in services, and related topics. Responsibilities include:

- Advising DAS on community outreach and engagement to reach a minimum of **2,500 unduplicated survey respondents**.

- Designing a user-friendly survey instrument in paper and online formats. This approach may include branching or even separate surveys altogether to tailor questions for different respondent groups (e.g., consumers, caregivers, service providers). This process will likely involve collaboration with DAS to refine the prior DFCNA survey instrument for improved clarity and accessibility.

- Translating the survey into the following languages: Chinese, Russian, Spanish, Tagalog, and Vietnamese.

- Implementing the survey using a multi-method sampling approach that includes:
    - **Convenience sampling** via online and paper survey formats to maximize broad community input. **Target: 2,250 respondents.**
    - **Randomized sampling** through a mailing process to obtain a representative sample of the aging and disability services consumer population. **Target: 250 respondents.**
        - Generate an **address-based sampling (ABS) frame of 25,000 mailing addresses**, stratified by characteristics such as age, race/ethnicity, and geography.
        - To achieve a targeted 250 respondents, coordinate with HSA and DAS to administer the survey by mail to 25,000 older and disabled residents. Mailing recipients will have the option to complete the survey online via a QR code or on paper using an enclosed, self-addressed, stamped return envelope.

- Monitoring response rates and demographic representativeness of respondents during the survey field period (August – September 2025), identifying gaps, and advising DAS on outreach strategy in real time to ensure broad, representative participation.

- Administering incentives for survey participation.

Deliverables:

- ABS sampling frame (July 2025)
- Finalized, translated, and formatted survey instrument (August 2025)
- Weekly survey monitoring summaries during active data collection (August – October 2025)

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Component C: Data Analysis and Reporting (October 2025 – January 2026)
The Contractor will manage and analyze survey data across sampling methods, documenting key findings and community needs as expressed by respondents. Responsibilities include:

- Analyzing both quantitative and qualitative survey responses to identify trends, disparities, and service needs. This analysis should investigate differences in trends across respondent subpopulations, including geographic areas (e.g., district), demographic characteristics (e.g., age, disability status, race/ethnicity, language, sexual orientation, gender identity), and socioeconomic characteristics (e.g., household size, income, veteran status).

- Testing for differences in demographics and responses across sampling methods.

- Identifying community needs, equity concerns and service gaps, and potential opportunities for improvement in programs and services for older adults and adults with disabilities.

- Working with DAS to refine and confirm desired format, structure, and contents for a summary report synthesizing survey findings.

- Drafting a **summary report** to synthesize survey findings, including:
    - Summary of methodology
    - Key findings organized by population and topic
    - Notable themes from open-ended responses
    - Data tables and visualizations
    - Technical appendices (e.g., data dictionary)

- Incorporating DAS feedback into a revised draft of the report.

- Presenting survey findings to the OAC.

- Submitting the final report and supporting research materials to DAS. These research materials include a **dataset of survey responses and corresponding analytical guide.**

Deliverables:

- Draft report (November 2025)
- Presentation of survey findings to OAC (December 2025)
- Final report (January 2026)
- Research materials and documentation, including dataset of survey responses and corresponding analytical guide (January 2026)

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Component D: Project Management (Ongoing)
Throughout the project, the Contractor will project manage research activities and deadlines to ensure completion in alignment with the overarching 2026 DFCNA project plan and timeline. The Contractor will facilitate regular check-in meetings with DAS project leads and coordinate with subcontractors (as needed). Responsibilities include:

- Communicating regularly with DAS project leads through ad hoc communications and standing meetings, including a 60-minute monthly call over the scope of the project and supplemental 30-minute weekly calls during the intensive project planning and survey implementation phases of work in June – September 2025. Calls should include status updates on project tasks, discussion and resolution of barriers to timely completion of these tasks, and identification of next steps.

- Providing internal project oversight and management to ensure the project's progress meets the needs of DAS and its stakeholders. These activities may include internal team check-ins and use of online tools for real-time monitoring of project progress.

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Project Timeline Overview

The timeline below summarizes key activities, milestones, and deliverables for the 2026 Dignity Fund Community Needs Assessment (DFCNA) – Community Survey.

Month	Key Activities / Services	Deliverables
June 2025	• Kick-off meeting with DAS • Document review • Stakeholder mapping and outreach • Draft Community Survey Analytical Plan	• **Community Survey Analytical Plan**
July 2025	• Present Community Survey Analytical Plan to OAC • Procure ABS sampling frame of 25,000 mailing addresses • Draft and refine survey instrument in collaboration with DAS • Translate survey materials	• **Presentation of Community Survey Analytical Plan to OAC** • **ABS sampling frame**
August 2025	• Launch survey in paper and online formats • Coordinate with HSA/DAS to administer randomized survey sample by mail • Monitor survey response rates weekly	• **Finalized survey instrument** • **Weekly monitoring summaries**
September 2025	• Continue survey data collection • Identify gaps in survey response and advise DAS on outreach adjustments • Extend survey period if needed	• **Weekly monitoring summaries**
October 2025	• Close data collection in consultation with DAS • Administer incentives • Begin analyzing survey data	N/A
November 2025	• Continue analyzing survey data • Draft report of survey findings • Share draft report with DAS for review and feedback	• **Draft report**
December 2025	• Revise draft report to incorporate DAS feedback • Present survey findings to OAC	• **Presentation of survey findings to OAC**
January 2026	• Finalize and share report with DAS • Prepare copies of research materials and documentation for DAS, including survey response dataset and analytical guide	• **Final report** • **Dataset of survey responses and analytical guide**

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VI. Location and Time of Services

The bulk of Contractor's work shall be done at their offices, located at 5440 Manila Ave., Oakland, CA 94618. When necessary, Contractor will work directly with staff, such as attending face-to-face meetings, at locations to be determined.

VII. Reporting Requirements

A. Contractor will provide a **monthly** report of activities. Contractor will enter the monthly metrics in the CARBON database by the 15th of the following month.

B. Contractor will provide a **final** report summarizing the contract activities. This report will also include accomplishments and challenges encountered by the Contractor. Contractor will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

C. Contractor will provide Ad Hoc reports as requested by the Department.
- This may include progress reports for stakeholders and agency staff.

D. For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas@sfgov.org
Principal Administrative Analyst, Office of Contract Management

or

Paulo.Salta@sfgov.org
Program Manager, Department of Disability and Aging Services

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Appendix B: Calculation of Charges
Clarity Social Research Group (Clarity)
2026 Dignity Fund Community Needs Assessment – Community Survey
June 1, 2025 – March 31, 2026

	Description	Timeline	Penny Huang Managing Director	Lynne Mobilio Assistant Director	Heather Imboden Senior Consultant	Kristi Kelly Research Associate	Total Hours	Total Cost
1	**Project Planning and Management**	**Jun 2025**						**$10,660**
a	Provide ongoing project management (e.g., project team meetings with DAS, ad hoc communications, internal team meetings, etc.)	Ongoing	12	12	6		30	$6,840
b	Convene project kickoff meeting		2	2	2		6	$1,340
c	Conduct document review		4	4	3		11	$2,480
2	**Project Design**	**Jun-Jul 2025**						**$10,380**
a	Develop project plan		5	5	4		14	$3,150
b	Facilitate stakeholder mapping and advise on outreach strategy		5	7	7		19	$4,190
c	Present project plan to OAC		6	7			13	$3,040
3	**Survey Development**	**Jun-Jul 2025**						**$11,170**
a	Develop survey instrument		5	8	6		19	$4,210
b	Format all versions of survey (e.g., translations) for paper and online administration		5	18		10	33	$6,960
4	**Data Collection**	**Aug-Oct 2025**						**$10,925**
a	Administer survey and provide ongoing monitoring of responses				10	6	16	$3,050
b	Enter paper survey data					45	45	$7,875

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	Description	Timeline	Penny Huang Managing Director	Lynne Mobilio Assistant Director	Heather Imboden Senior Consultant	Kristi Kelly Research Associate	Total Hours	Total Cost
5	**Data Analysis**	**Sept-Dec 2025**						**$19,900**
a	Prepare integrated dataset of survey responses				8		8	$1,600
b	Develop and apply population data weights for random sample				15		15	$3,000
c	Analyze quantitative survey data				45		45	$9,000
d	Analyze qualitative survey data					36	36	$6,300
6	**Reporting**	**Nov 2025-Jan 2026**						**$24,625**
a	Prepare draft report on findings		8	30	24	14	76	$15,850
b	Prepare presentation deck on findings		1	4		2	7	$1,480
c	Present findings to OAC		6	7			13	$3,040
d	Prepare final report on findings with feedback from DAS		7	9	0	3	19	$4,255
7	**Direct Costs**	**Ongoing**						**$11,340**
a	ABS sampling frame							$4,000
b	Survey return boxes ($60 for 10)							$120
c	Survey translations							
c.1	Chinese							$1,260
c.2	Russian							$1,200
c.3	Spanish							$1,220
c.4	Tagalog							$1,220
c.5	Vietnamese							$1,220
d	Incentives ($100 raffle x 11)							$1,100
	Total		**66**	**113**	**130**	**116**	**425**	**$99,000**

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Appendix A: Services to be Provided
Clarity Social Research Group (Clarity)
2026 Dignity Fund Community Needs Assessment – Community Facilitation
June 1, 2025 – March 31, 2026

I. Purpose

The San Francisco Human Services Agency's (SFHSA) Department of Disability and Aging Services (DAS) plans and administers a variety of federal, state and local programs to assist older adults, veterans, people with disabilities, and their families to maximize safety, health, and independence. We directly provide and partner with community-based organizations to offer services that support these populations to safely live and engage in the community for as long as possible and maintain the highest quality of life. The purpose of this contract is to provide contractor services to conduct the Community Survey component of the Dignity Fund Community Needs Assessment (DFCNA).

II. Background

In November 2016, San Francisco voters approved an amendment to the Charter of the City and County of San Francisco establishing the Dignity Fund, a protected funding source for social services that support older adults, adults with disabilities, veterans, and caregivers. The purpose of the Fund is to help individuals age with dignity while strengthening the network of community-based services throughout the city.

The legislation set a baseline annual funding level of $38 million, with scheduled increases over time. The City was required to increase the Fund by $6 million in Fiscal Year (FY) 2017-18, followed by annual increases of $3 million through FY 2026-27. Beginning in FY 2027-28, the Fund will continue at that level, with annual adjustments based on changes in the City's aggregate discretionary revenues, through FY 2036-37.

In addition, the legislation established a four-year planning and funding cycle. Each cycle begins with the Dignity Fund Community Needs Assessment (DFCNA), a comprehensive assessment process designed to identify community needs, assess equity and service gaps, and develop recommendations to respond to these issues. In the following year, the findings from the DFCNA inform the development of a Services and Allocation Plan (SAP), which outlines how Dignity Fund resources will be allocated over the next four years to address identified needs. The first DFCNA was completed in 2018.

The 2026 Dignity Fund Community Needs Assessment (DFCNA) will initiate the third Dignity Fund planning and funding cycle. In accordance with the Dignity Fund Charter amendment, the assessment must be conducted and completed in FY 2025-26.

The 2026 DFCNA will employ a combination of quantitative and qualitative data collection and analysis, including review of demographic and population data, program administrative data, and data gathered through community research activities. This analysis will help the Department of Disability and Aging Services (DAS) to understand

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current community needs, identify equity concerns and service gaps, and support the development of recommendations for future service delivery and funding priorities.

To implement the community research components of the DFCNA, DAS sought contractor services for two key activities: (1) a Community (Population) Survey and (2) Community Facilitation. The Human Services Agency (HSA) and DAS issued a solicitation through the City's Informal Bid process. Following procurement protocols, Clarity Research Social Group was selected to conduct the Community Facilitation component.

Appendix C includes a draft project plan for the 2026 Dignity Fund Community Needs Assessment (DFCNA). The final project plan will be presented for review and discussion at the July 21, 2025 meeting of the Dignity Fund Oversight and Advisory Committee (OAC).

III. Definitions

CARBON: Contracts Administration Reporting & Billing Online database

CBO: Community Based Organization

CITY: City and County of San Francisco, a municipal corporation

CONTRACTOR: Clarity Social Research Group

DAS: Department of Disability and Aging Services

DF: Dignity Fund

DFCNA: Dignity Fund Community Needs Assessment

OAC: Oversight and Advisory Committee of the Dignity Fund

OCM: Office of Contract Management, Human Services Agency

OCP: Office of Community Partnerships

SAP: Services and Allocation Plan

SFHSA: San Francisco Human Services Agency

IV. Target Population

All residents of San Francisco that are eligible for services from the Department of Disability and Aging Services; those that are older adults aged 60 or older and individuals ages 18-59 with a disability(ies), including those with the greatest economic and / or social need.

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V. Description of Services

The Contractor will assist the San Francisco Department of Disability and Aging Services (DAS) in designing and implementing the 2026 Dignity Fund Community Needs Assessment (DFCNA) – Community Facilitation. This work will include document review, development of community forum and focus group facilitation materials, facilitation of these forum and focus group sessions, data collection and analysis, and reporting of findings.

The scope of work includes the following components:

Component A: Project Kickoff and Plan (June – July 2025)

The Contractor will coordinate with DAS to officially launch the project and begin planning major project activities, such as facilitation of community forums and focus groups. Responsibilities include:

- Convening an initial meeting with DAS to kick off the project and confirm a shared understanding of the project goals, roles, and responsibilities, timeline, activities, and deliverables.

- Reviewing relevant existing documents, including prior DFCNA analytic plans and final reports, other reports related to the implementation and outcomes of activities supported by the Dignity Fund, and any other materials identified by DAS to establish a foundation for this year's needs assessment.

- Facilitating stakeholder mapping to identify key populations and audiences of interest, and to support development of outreach and recruitment strategy for community forums and focus groups, in alignment with the draft 2026 DFCNA project plan and timeline provided by DAS.

- Developing a **Community Facilitation Analytical Plan** that outlines the proposed approach to outreach and recruitment for community forums and focus groups, facilitation considerations for populations of focus across these sessions, data collection, analysis, and reporting. The plan will include timeline benchmarks and required resources for key project activities. The Community Facilitation Analytical Plan will inform the finalized 2026 DFCNA Project Plan to be prepared by DAS.

- Presenting the Community Facilitation Analytical Plan to the Dignity Fund Oversight and Advisory Committee (OAC), along with the overarching 2026 DFCNA Project Plan to be presented by DAS.

Deliverables:

- Community Facilitation Analytical Plan (June 2025)
- Presentation of Community Facilitation Analytical Plan to OAC (July 2025)

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Component B: Community Forums (July – September 2025)
The Contractor will design and facilitate a **total of 12 community forums** to gather input from older adults, adults with disabilities, caregivers, veterans, and service providers regarding community needs, service access, consumer experiences participating in services, and related topics. Responsibilities include:

- Facilitating **11 in-person community forums** (one per supervisorial district). Forums will be 90 minutes long, with a target of 30-50 participants each.
- Facilitating **1 virtual citywide forum**. This forum will be 60 minutes long, with a target of 30-50 participants.
- Developing a **facilitation guide and other run-of-show materials** to support robust data gathering on community perspectives.
- Taking detailed notes on feedback gathered through each community forum session.
- Coordinating with DAS to collect demographic data on community forum participants.
- Monitoring community forum attendance and demographic representativeness of participants across forum events, identifying gaps, and advising DAS on outreach strategy in real time to ensure broad, representative participation.

Deliverables:

- Finalized facilitation guide and run-of-show materials (August 2025)
- Facilitation of 12 community forums (August – September 2025)

Component C: Focus Groups (July – September 2025)
The Contractor will design and facilitate a **total of 10 focus groups** for more in-depth discussions on community needs and experiences with specific subpopulations. Focus group topics and target populations will be identified in consultation with DAS. Responsibilities include:

- Facilitating **5 in-person** and **5 virtual focus groups**. Each focus group session will be 60 minutes long, with a target of 8-10 participants per group.
- Developing a **facilitation guide and other run-of-show materials** to support robust data gathering on community perspectives.
- Taking detailed notes on feedback gathered through each focus group session.
- Coordinating with DAS to collect demographic data on focus group participants.

Deliverables:

- Finalized facilitation guide and run-of-show materials (August 2025)
- Facilitation of 10 focus groups (August – September 2025)

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Component D: Data Analysis and Reporting (October 2025 – January 2026)
The Contractor will manage and analyze data collected through community forums and focus groups, identifying key findings and community needs expressed by participants. Responsibilities include:

- Analyzing qualitative data to identify common themes, disparities, and service needs. This analysis should investigate differences in trends across participant subpopulations, including geographic areas (e.g., district), demographic characteristics (e.g., age, disability status, race/ethnicity, language, sexual orientation, gender identity), and socioeconomic characteristics (e.g., household size, income, veteran status).

- Identifying community needs, equity concerns and service gaps, and potential opportunities for improvement in programs and services for older adults and adults with disabilities.

- Drafting a **summary report** to synthesize community forum and focus group findings, including:
    - Summary of methodology
    - Key findings organized by theme/topic and population
    - Supporting quotes, paraphrased responses, etc.
    - Summary data on participant demographics

- Incorporating DAS feedback into a revised draft of the report.

- Presenting community forum and focus group findings to the OAC.

- Submitting the final report and supporting research materials to DAS. These materials include notes from all community forum and focus group sessions, a dataset of participant demographics across all sessions, and an analytical guide corresponding to all qualitative and quantitative analysis.

Deliverables:

- Draft Report (November 2025)
- Presentation of community forum and focus group findings to OAC (December 2025)
- Final report (January 2026)
- Research materials and documentation, including all community forum and focus group notes, participant demographic dataset, and corresponding analytical guide for all analysis (January 2026)

Component E: Project Management (Ongoing)
Throughout the project, the Contractor will project manage research activities and deadlines to ensure completion in alignment with the overarching 2026 DFCNA project plan and timeline. The Contractor will facilitate regular check-in meetings with DAS project leads and coordinate with subcontractors (as needed). Responsibilities include:

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- Communicating regularly with DAS project leads through ad hoc communications and standing meetings, including a 60-minute monthly call over the scope of the project and supplemental 30-minute weekly calls during the intensive project planning and survey implementation phases of work in June – September 2025. Calls should include status updates on project tasks, discussion and resolution of barriers to timely completion of these tasks, and identification of next steps.

- Providing internal project oversight and management to ensure the project's progress meets the needs of DAS and its stakeholders. These activities may include internal team check-ins and use of online tools for real-time monitoring of project progress.

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Project Timeline Overview

The timeline below summarizes key activities, milestones, and deliverables for the 2026 Dignity Fund Community Needs Assessment (DFCNA) – Community Facilitation.

Month	Key Activities / Services	Deliverables
June 2025	• Kick-off meeting with DAS • Document review • Stakeholder mapping and outreach • Draft Community Facilitation Analytical Plan	• **Community Facilitation Analytical Plan**
July 2025	• Present Community Survey Analytical Plan to OAC • Draft and refine facilitation guides for forums and focus groups in collaboration with DAS	• **Presentation of Community Facilitation Analytical Plan to OAC**
August 2025	• Begin facilitating community forums (11 in person + 1 virtual) and focus groups (5 in person + 5 virtual) • Monitor forum attendance and advise on adjustments to outreach to address gaps	• **Finalized facilitation guides for forums and focus groups** • **Facilitation of forums and focus groups**
September 2025	• Complete facilitating community forums and focus groups • Monitor forum attendance and advise on adjustments to outreach to address gaps	• **Facilitation of forums and focus groups**
October 2025	• Analyze community forum and focus group data	N/A
November 2025	• Continue analyzing community forum and focus group data • Draft report of findings • Share draft report with DAS for review and feedback	• **Draft report**
December 2025	• Revise draft report to incorporate DAS feedback • Present community forum and focus group findings to OAC	• **Presentation of forum and focus group findings to OAC**
January 2026	• Finalize and share report with DAS • Prepare copies of research materials and documentation for DAS, including all community forum and focus group notes, participant demographic dataset, and corresponding analytical guide for all analysis	• **Final report** • **Notes on all forum and focus group events, dataset of participant demographics, and analytical guide**

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VI. Location and Time of Services

The bulk of Contractor's work shall be done at their offices, located at 5440 Manila Ave. Oakland, CA 94618. When necessary, Contractor will work directly with staff, such as attending face-to-face meetings, at locations to be determined.

VII. Reporting Requirements

A. Contractor will provide a **monthly** report of activities. Contractor will enter the monthly metrics in the CARBON database by the 15th of the following month.

B. Contractor will provide a **final** report summarizing the contract activities. This report will also include accomplishments and challenges encountered by the Contractor. Contractor will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

C. Contractor will provide Ad Hoc reports as requested by the Department.
- This may include progress reports for stakeholders and agency staff.

D. For assistance with reporting requirements or submission of reports, contact:

Rocio Duenas@sfgov.org
Principal Administrative Analyst, Office of Contract Management

or

Paulo.Salta@sfgov.org
Program Manager, Department of Disability and Aging Services

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Appendix B: Calculation of Charges
Clarity Social Research Group (Clarity)
2026 Dignity Fund Community Needs Assessment – Community Facilitation
June 1, 2025 – March 31, 2026

	Description	Timeline	Penny Huang Managing Director	Lynne Mobilio Assistant Director	Heather Imboden Senior Consultant	Kristi Kelly Research Associate	Total Hours	Total Cost
1	**Project Planning and Management**	**Jun 2025**						**$9,980**
a	Provide ongoing project management (e.g., project team meetings with DAS, ad hoc communications, internal team meetings, etc.)	Ongoing	12	12	6		30	$6,840
b	Convene project kickoff meeting		2	1.5	1.5		5	$1,130
c	Conduct document review		3	3	3		9	$2,010
2	**Project Design**	**Jun-Jul 2025**						**$6,600**
a	Develop project plan		5	5	4		14	$3,150
b	Facilitate stakeholder mapping and advise on outreach strategy		3	3	3		9	$2,010
c	Present project plan to OAC		4	2			6	$1,440
3	**Community Facilitation Activities**	**Aug-Oct 2025**						**$67,975**
a	Design and facilitate 11 in-person community forums		32.5	42	71.5	71.5	217.5	$44,177
b	Design and facilitate 1 virtual community forum		2	2	5	4	13	$2,640
c	Design and facilitate 5 in-person focus groups		6.5	13	32.5	19.5	71.5	$14,398
d	Design and facilitate 5 virtual focus groups			3	20	12	35	$6,760

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	Description	Timeline	Penny Huang Managing Director	Lynne Mobilio Assistant Director	Heather Imboden Senior Consultant	Kristi Kelly Research Associate	Total Hours	Total Cost
4	**Data Analysis and Reporting**	**Nov 2025-Jan 2026**						**$14,445**
a	Prepare draft report on findings		*5*	15	8	3	31	**$6,675**
b	Prepare presentation deck on findings			*5*			*5*	**$1,100**
c	Present findings to OAC (costs captured in survey scope)						0	**$0**
d	Prepare final report on findings with feedback from DAS		10	10	*7*	2.5	29.5	**$6,670**
	Totals		**85**	**116.5**	**161.5**	**112.5**	**475.5**	**$99,000**

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SAN FRANCISCO HUMAN SERVICES AGENCY
Department of Disability and Aging Services

2026 Dignity Fund Community Needs Assessment Project Plan [DRAFT]

March 2025

Prepared by Adithi Vellore, SFHSA Planning

Project Context

With the November 2016 passage of Proposition I, San Francisco voters established the **Dignity Fund,** creating protected funding for social services that support older people, adults with disabilities, veterans, and caregivers to safely live and engage in the community. The Dignity Fund is administered by the **San Francisco Department of Disability and Aging Services (DAS),** the City's lead agency focused on older adults and adults with disabilities.

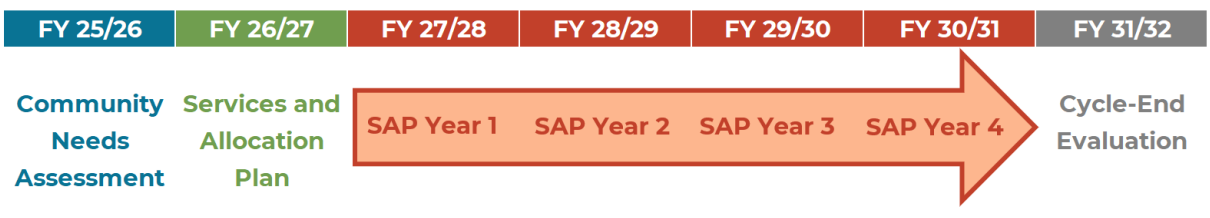
The Dignity Fund legislation guided DAS to **institute a rigorous four-year planning, funding, and evaluation process** to ensure that funds are distributed responsibly and transparently to best address community needs. The cycle begins with a **Community Needs Assessment** in the first year to identify equity issues and unmet needs that need to be addressed. This information supports the development of a **Services and Allocation Plan** in the second year of the cycle. This plan outlines how Dignity Fund money will be used to address community needs for a four-year period that begins in the subsequent year. The cycle ends with a **Cycle-End Evaluation,** to assess the impact of the Dignity Fund over the past four years of funding. This planning, funding allocation, and evaluation process is repeated every four years.

Project Scope and Objectives

The **2026 Dignity Fund Community Needs Assessment (DFCNA)** marks the beginning of the third Dignity Fund cycle. The purpose of this needs assessment is to gather community input on the needs of diverse San Francisco older adults, adults with disabilities, veterans, and caregivers. DAS will use findings on our community's needs, service system strengths and gaps, and equity issues to inform Dignity Fund spending to address community needs.

As outlined by the Dignity Fund legislation, this needs assessment must be conducted and completed in FY 2025-26.

Figure 1. Overview of the Dignity Fund Cycle for FY 2027-28 to FY 2030-31



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The 2026 DFCNA seeks to answer the following high-level research questions:

1. What are the needs of older adults and adults with disabilities in San Francisco?
2. What are the system-level strengths and gaps?
3. What population subgroups may be underserved?

Methodology

The 2026 DFCNA will include a variety of analytical activities, incorporating both quantitative and qualitative analysis of data sources including population data, program administrative data, and data gathered through community research. Taken together, these analyses will help DAS to understand current community needs, identify equity concerns and service gaps, and develop recommendations to address these issues.

Community Research

DAS is committed to carrying out a **variety of community research activities to gather input about community needs directly from diverse San Francisco stakeholders,** including actual and potential consumers of disability and aging services, community-based service providers, and other community professionals, leaders, and advocates. DAS will carry out — with the support of one or more research consultants — the following community research activities:

- **Community Forums:** A series of 14+ facilitated town hall-style events carried out in each of the city's 11 supervisorial districts (in person) and citywide (virtual) to capture high-level community input on areas of need, barriers to participation in services, and broader service system issues.
- **Focus Groups:** A series of 25+ more narrowly focused discussions to supplement community forums. Each focus group will take place with about 8-10 individuals, allowing for a deeper dive into specific issues and with distinct stakeholder populations identified in conjunction with DAS.
- **Population Survey:** A survey to gather information from older adults, adults with disabilities, veterans, caregivers, and service providers about community needs, experience accessing and participating in services, and other topics relevant for this assessment. DAS wishes to maximize opportunity for community input and obtain a representative sample through the population survey. One approach could be to administer the survey using both:
    - **Convenience sampling,** via both online and paper survey formats to maximize community input, and
    - **Randomized sampling,** via a phone survey format to obtain a representative sample of general disability and aging services consumers.
- **Dignity Fund Service Provider Work Group Listening Session:** A facilitated discussion to gather input on community needs and service system issues from DAS service providers.

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Equity Analysis

DAS will also complete a **quantitative equity analysis to help us evaluate how well the Department is serving the city's diverse populations** — particularly communities that face barriers in access to resources and opportunity — and identify possible disparities in service provision and utilization. The equity analysis leverages **population data** and **program administrative data** to develop a set of standardized metrics that help to answer the following questions:

1. Are populations with the presence of an equity factor utilizing services at the same rate as the population citywide?
2. How do service utilization rates among low-to-moderate-income populations compare across districts in the city?
3. How are funds spent across city districts?

In particular, the equity analysis examines service participation rates and resource allocation across the city for the DAS client population overall, and for **subpopulations with the presence of one of the following equity factors:**

- Low-to-moderate income
- Limited English Proficiency
- Living alone status
- Communities of Color
- LGBTQ+ identification

Table 1. Equity Analysis Data Sources

Data Source	Description
Population Data 2023 American Community Survey 5-Year Estimates	DAS will use publicly available population data to estimate the size of eligible client populations overall and with the presence of an equity factor, both citywide and in each supervisorial district. We will use this data to develop a demographic profile of San Francisco older adults and adults with disabilities, as well as an analysis of service participation rates to answer the first two equity analysis questions.
Program Administrative Data DAS Office of Community Partnerships client enrollments	DAS will use client enrollment data, primarily available through the centralized SF DAS GetCare database, to develop a demographic profile of DAS Office of Community Partnerships clients, as well as an analysis of service participation rates to answer all three equity analysis questions. Of note, the Department will also leverage other program administrative data across SFHSA and DAS systems (e.g., CalSAWs, CMIPS II, etc.) to ensure client demographic information is as complete as possible.
Program Administrative Data DAS Office of Community Partnerships budget	DAS will use program budget data available through the F$P database to develop analysis of resource allocation to answer the third equity analysis question.

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Gaps Analysis and Recommendations

DAS will synthesize findings from the community research and equity analyses to answer the high-level research questions that guide the 2026 DFCNA overall. Based on the community needs, service system strengths and gaps, and equity issues we identify, DAS will develop recommendations to address areas of need, particularly unmet need.

Deliverables

The 2026 DFCNA will result in following deliverables:

Table 2. 2026 Dignity Fund Community Needs Assessment Deliverables

Deliverable & Lead	Description
Project Plan *DAS*	This document serves as the 2026 DFCNA project plan. It outlines key project components, relevant activities, required resources, and anticipated timeline. This project plan will be supplemented by more detailed analytical plans developed by our community research consultant(s), in conjunction with and at the direction of DAS staff. These supplemental plans will outline how the consultants will carry out community research activities in alignment with the overarching 2026 DFCNA project plan and timeline. In accordance with the Dignity Fund legislation, this project plan must be presented to the DAS Commission, Dignity Fund Oversight and Advisory Committee (OAC), and Dignity Fund Service Provider Work Group by September 1, 2025.
Community Research Findings *Consultant(s)*	The community research consultant(s) will provide DAS with two standalone written reports synthesizing preliminary findings from: (1) community forums and focus groups, and (2) the population survey. The consultants will also present these community research findings to the OAC in late 2025.
Written Report *DAS*	DAS will develop the 2026 DFCNA report with input from the OAC. This report will provide summary data and synthesize findings across the various research and analytical activities described in this project plan, and also provide recommendations to address identified issues. In accordance with the Dignity Fund legislation, DAS will share a full, publicly-available report draft with the OAC by March 1, 2026. The Department will present the draft report at a subsequent OAC meeting to obtain feedback from the OAC.

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Deliverable & Lead	Description
Public Presentations *DAS + Consultant(s)*	DAS and our community research consultant(s) will present at OAC meetings throughout the 2026 DFCNA process: • **July 2025:** Project plan • **December 2025:** Preliminary research findings • **March 2026:** Draft report • **April 2026:** Final report (joint hearing with DAS Commission)
Research Materials and Documentation *Consultant(s)*	The community research consultant(s) will provide DAS with copies of research materials and related documentation, including: • Notes from community forums and focus groups • Participant demographic dataset from community forums and focus groups • Dataset from population survey • Analytical guides corresponding to all quantitative and qualitative analysis

Intended Audience

The intended audience for the 2026 DFCNA includes, but is not limited to, the following City and community stakeholders:

- City leaders (e.g., Mayor, Board of Supervisors, Commissions)
- City departments (e.g., SF Department of Homelessness and Supportive Housing)
- DAS community advisory bodies (e.g., OAC, SPWG, DAS Commission, Mayor's Disability Council, etc.)
- Community-based service providers, leaders, and advocates
- General public

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Project Team

The 2026 DFCNA will be facilitated by the following project leads and other key stakeholders:

Table 3. 2026 Dignity Fund Community Needs Assessment Project Team

Lead	Role
SFHSA Planning	• Support the community research consultant procurement process, including development of IBs • Project manage the DFCNA, including responsibility for directing consultant work on community research activities, equity analysis, and report development • Provide technical expertise in planning, executing, and interpreting community research • Prepare population and client profiles + equity analysis • Facilitate DFCNA project team discussions to develop overall findings and recommendations • Prepare full DFCNA report and related presentations
DAS Office of Community Partnerships	• Lead the community research consultant procurement process, including coordination with SFHSA Contracts • Manage the consultant contract(s), including responsibility for routine administrative matters as well as any action required to address compliance issues • Coordinate OCP analysts to facilitate community research engagement/participant recruitment via City and community partners • Coordinate OCP analysts to support in-person and virtual community research events like forums and focus groups • Coordinate OCP administrative staff to facilitate on-site survey administration at select DAS service sites • Participate in discussions to develop overall report findings and recommendations • Provide feedback on the draft DFCNA report and any interim materials to support development of final report
Community Research Consultant(s)	• Plan and execute community research activities, including community forums, focus groups, and population survey • Prepare a written report and related public presentations summarizing preliminary community research findings
SFHSA Budget	• Provide DAS budget data to support equity analysis
SFHSA Communications	• Develop a communications plan to support community outreach and engagement in DFCNA research activities • Facilitate development of communications materials such as web pages, fliers, email/text campaigns, notices in SFHSA and community newsletters, social media posts, etc., aligned with Citywide accessibility standards
DAS Executive Leadership	• Participate in discussions to develop overall report findings and recommendations • Provide feedback on the draft DFCNA report and any interim materials to support development of final report

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Timeline

Activity	2025												2026					
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Procure consultant(s)	■	■	■	■	■													
Develop project plan, including community research supplemental analytical plans						■	■											
Share project plan with OAC, DAS Commission, and stakeholder bodies (by Sept 1, 2025)							■											
Conduct needs assessment activities							■	■	■	■	■	■						
Draft report										■	■	■	■	■				
Share draft report (by March 1, 2026)															■			
Share final report (by April 1, 2026)																■		
Hold joint public hearing of the OAC and DAS Commission																■		
DAS Commission approval vote (by May 1, 2026)																	■	
BOS approval vote (by June 1, 2026)																		■