



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

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London Breed
Mayor

Trent Rhorer
Executive Director

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS DS
EE

DATE: DECEMBER 7, 2022

SUBJECT: CONTRACT MODIFICATION: **UNITE US (FOR PROFIT)**
FOR PROVISION OF ONLINE RESOURCE DIRECTORY

	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
CONTRACT TERM:	05/01/22- 04/30/25	12/01/22- 4/30/25	05/01/22- 04/30/25		
CONTRACT AMOUNT:	\$798,750	\$2,936,500	\$3,735,250	\$373,525	\$4,108,775
ANNUAL AMOUNT:	<u>FY 21-23</u>	<u>FY 23/24</u>	<u>FY 24/25</u>		
	\$863,250	\$1,231,250	\$1,640,750		
Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
	\$2,936,500	\$798,750		\$373,525	\$4,108,775
FUNDING: PERCENTAGE:	79%	21%			100%

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing contract with Unite Us for the period of December 1, 2022 through April 30, 2025, in the additional amount of \$2,936,500 plus a 10% contingency for a revised total amount not to exceed \$4,108,775. The purpose of this modification is to include the Department of Public Health (DPH) as a customer of Unite Us in the existing contract to provide an Online Resource Directory.

Background

There is a clear and evident gap in the San Francisco community of a singular and easy to use tool to both find and utilize local resources to address social needs. In 2018, the Department of Disability and Aging Services (DAS) completed a comprehensive needs assessment of the services offered to older adults and people with disabilities. During the data collection process, community stakeholders described the challenges of finding information regarding local services and supports. Several stakeholders expressed the need for an Online Resource Directory (ORD), including Community-Based Organizations (CBOs), health care providers, clinicians, staff, service providers and the community at large.

Recently, the Department of Public Health (DPH) also expressed an interest in a dynamic and interactive resource directory. DPH found that its needs for a platform to help connect clients to services, resources, and providers citywide can also be met by Unite Us. As a result, DAS and DPH will use the same vendor for this service.

This resource directory is developed through partnerships with local organizations, including 211s and United Way Worldwide and through the work of Unite Us' own internal resource directory team. The resource directories are supported and maintained through those partnerships and through Unite Us' own active maintenance team and direct engagement with the organizations listed.

Services to be Provided

Under this modification, the contractor will develop an Online Resource Directory for DAS and one for DPH to serve as a searchable repository of resources for a wide range of services. The ORD will also coordinate electronic referrals and case management tasks on a common platform (the "Unite Us Platform"). The DAS ORD is currently being developed and will launch by February 2023.

Selection

Contractor was selected through Request for Proposals (RFP) # 1014, which was competitively bid in February 24, 2022.

Funding

Funding for this contract is provided through a combination of General and State Funds.

ATTACHMENTS

Appendix A-1, Statement of Work

Appendix B-1, Budget

Appendix A-1
December 1, 2022 – April 30, 2025
UNITE US PLATFORM – STATEMENT OF WORK – SF DPH

General Terms

Overview. Unite Us has developed proprietary software to coordinate electronic referrals and case management tasks between health and social service organizations on a common platform (the “Unite Us Platform”). Subject to the terms of the Software as a Service Agreement between the County and City of San Francisco and Unite USA Inc. with an Effective Date of May 1, 2022, and Customer’s payment of the fees set forth below, Unite Us shall provide Customer end-user licenses to use the Unite Us Platform within San Francisco County (the “Territory”) during the Initial Term (as defined below) and manage the coordinated care network.

Term. This Statement of Work shall remain in effect for 3 years from the Effective Date (the “Initial Term”) and shall automatically renew for additional one-year terms unless either party provides notice of its intent not to renew at least 30 days prior to the expiration of the then-current term (each, a “Renewal Term” and, together with the Initial Term, the “Term”).

Termination. Either party may terminate this Statement of Work upon the default of the other party. Default includes: (i) failure of Customer to pay any amount due under this Statement of Work within 10 days of receipt of notice from Unite Us regarding such failure to pay and (ii) except for the failure in subsection (i), the material breach by either party of any of the terms of this Statement of Work if the defaulting party fails to cure such breach within 30 days following notice from the non-defaulting party.

Unite Us Insights. Unite Us will provide Customer with up to 5 licenses during the Initial Term to access network-level, de-identified data via the Unite Us Network Activity Dashboard and Health Equity Dashboard.

Unite Us FHIR Integration. Unite Us will provide an EHR workflow application, which includes the ability to access the Unite Us Platform through Customer’s existing EHR system (Epic) (the “EHR Platform”) on a mutually agreeable timeline. In addition, to the fees set forth below, service or transaction-based fees and expenses imposed by the EHR Platform that are Customer-specific shall be considered third-party expenses and passed through to Customer on a dollar-for-dollar basis and shall be invoiced on a monthly basis. Integrations not using SMART on FHIR specifications are not included. Customer will reasonably assist with the relationship between Customer and the EHR Platform to enable timely implementation.

Weekly Data Delivery. Unite Us will also provide client-level, identifiable data for individuals on the Unite Us Platform served or referred by Customer users within the Territory on a weekly cadence via SFTP to be implemented on a mutually agreed timeline, subject to applicable law.

Workforce Management Dashboard. Unite Us will also provide Customer the ability to view standard utilization metrics on Customer’s internal users via the Workforce Management Dashboard.

Program Activity Dashboard. Unite Us will provide Customer access to the Program Activity Dashboard, which displays standard aggregated de-identified metrics regarding cases referred or managed for clients served by organizations identified by customer (“Program Activity Entities”). Program Activity Entities will receive web-based access to the Unite Us Platform at no additional cost to Customer or the Program Activity Entities. In the event that any Program Activity Entity no longer approves sharing their organization-level metrics with Customer, Unite Us will promptly remove the entity’s information from the dashboard.

Premium Support - Social Care Coordination. Unite Us will enable Customer to send referrals directly to Unite Us for coordination to CBOs within the Territory. For purposes of this Statement of Work, “CBOs” means any nonprofit social service organization (other than health systems, health plans and government

agencies) primarily providing services that are not clinical in nature. The fees set forth below cover coordination of up to 50, 100, or 150 referrals per week by Unite Us.

Training. Unite Us shall provide new user training and one annual virtual training session at no additional cost to Customer.

Support. Unite Us shall provide technical support via Unite Us-approved support channels from 9 AM to 10 PM Eastern Time.

Marketing. Customer agrees to allow Unite Us to add Customer's name and/or logo to a list of selected or representative customers and in other promotional material (such as marketing presentations).

Appendix B-1
December 1, 2022 – April 30, 2025
UNITE US PLATFORM – Budget – SF DPH

Customer shall pay Unite Us in accordance with the following fee schedule:

Description	Year 1	Year 2	Year 3
Network Implementation	\$20,000	N/A	N/A
Network Access – Licenses to the Unite Us Platform for SF DPH providers and programs within the Territory (available on the Effective Date) <ul style="list-style-type: none"> - Y1: 125 Licenses (25 included at no-cost); - Y2: 225 Licenses (25 included at no-cost) - Y3: 325 Licenses (25 included at no-cost) 	\$210,000	\$420,000	\$630,000
Unite Us Insights (5 Licenses available on the Effective Date) <ul style="list-style-type: none"> - Network Activity and Health Equity Dashboards (<i>waived</i>) - Weekly Data Delivery (\$30,000) 	\$30,000	\$30,000	\$30,000
Unite Us FHIR Integration (Epic)	<i>Waived</i>	<i>Waived</i>	<i>Waived</i>
<i>Discount</i>	<i>-\$13,000</i>	<i>-\$22,500</i>	<i>-\$33,000</i>
Total Fees	\$247,000	\$427,500	\$627,000
Optional Additional Services			
Unite Us Insights <ul style="list-style-type: none"> - Workforce Management Dashboard (\$20,000) - Program Activity Dashboard (\$45,000) 	\$65,000	\$65,000	\$65,000
Premium Support – Social Care Coordination – (weekly referral volume and cost dependent upon level selected by SF DPH) <ul style="list-style-type: none"> - 50 referrals per week - 100 referrals per week - 150 referrals per week 	\$90,000 (50 referrals per week) \$180,000 (100 referrals per week) \$270,000 (150 referrals per week)	\$90,000 (50 referrals per week) \$180,000 (100 referrals per week) \$270,000 (150 referrals per week)	\$90,000 (50 referrals per week) \$180,000 (100 referrals per week) \$270,000 (150 referrals per week)
Optional Additional Services Maximum Total	\$335,000 (assumes no additional Network Access License purchase)	\$545,000 (assumes purchase of 100 additional Network Access Licenses)	\$755,000 (assumes purchase of Unlimited Network Access Licenses)
Contract Authority Maximum Annual (Including Additional Services)	\$582,000	\$972,500	\$1,382,000

Customer may also elect to purchase additional licenses during the Initial Term in the following amounts:

Number of Licenses	Annual Fee
50 Licenses	\$105,000
100 Licenses	\$210,000
Unlimited Licenses*	\$420,000

*DPH may elect to purchase Unlimited Licenses at any time during Year 3 of the Initial Term. Payments to Unite Us are due within 30 days of receipt of the applicable invoice.