



# SAN FRANCISCO HUMAN SERVICES AGENCY

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

Office of Early Care  
and Education

P.O. Box 7988  
San Francisco, CA  
94120-7988  
[www.SFHSA.org](http://www.SFHSA.org)



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

## MEMORANDUM

**TO:** HUMAN SERVICES COMMISSION

**THROUGH:** TRENT RHORER, EXECUTIVE DIRECTOR

**FROM:** DAN KAPLAN, DEPUTY DIRECTOR  
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

**DATE:** MAY 19, 2023

**SUBJECT:** NEW GRANT: **BAY AREA LEGAL SERVICES**  
(NON-PROFIT) FOR OPTIONAL BENEFITS  
COUNSELING FOR GUARANTEED INCOME FOR  
EXTENDED FOSTER YOUTH PILOT

DS  
EL

**GRANT TERM:** July 1, 2023-June 30, 2026

<b>GRANT AMOUNT:</b>	<u>New</u>	<u>Contingency</u>	<u>Total</u>
	\$235,000	\$23,500	\$258,500

<b>ANNUAL AMOUNT:</b>	<u>FY23-24</u>	<u>FY24-25</u>	<u>FY25-26</u>
	\$110,220	\$61,812	\$62,968

<b><u>Funding Source</u></b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>		\$235,000		\$23,500	\$258,500
<b>PERCENTAGE:</b>		100%			

The Department of Benefits and Family Support (BFS) requests authorization to approve a sole source waiver and to enter into a grant with Bay Area Legal Aid (BALA) for the period of July 1, 2023 to June 30, 2026, in an amount of \$235,000 plus a 10% contingency for a total amount not to exceed \$258,500. The purpose of the grant is to provide benefits counseling for the Guaranteed Income (GI) Pilot Program for Extended Foster Youth.

### Background

In September of 2022, the Human Services Agency (HSA) applied to the State of California's request to launch a Guaranteed Income for Extended Foster Youth Pilot Program (GI Pilot Program). HSA received notice of award in the fall of

2022. As the Commission has previous seen, the pilot program will offer \$1200 monthly benefit to a total of 150 foster youth over the age of 21 for the period of 18 months, who meet the established income thresholds. San Francisco is planning to provide twice the suggested monthly amount due to San Francisco rental costs being some of the highest in the nation.

BALA is uniquely qualified to provide benefits counseling as they have law offices in 7 Bay Area counties and are the largest provider of free legal services in the Bay Area.

### **Services to be Provided**

BALA will provide benefits counseling to all GI pilot participants. They will represent participants in administrative matters related to the discontinuation or disruption of benefits. They will create a 'tool-kit' for GI participants to help them navigate and assess and the potential impact of GI on their public benefits.

They will also attend local and statewide meetings on the GI pilot, and engage in policy work on behalf of GI program recipients related to the intersection of GBI payments and public benefits programs.

For a full description, please see attached Appendix A, scope of Services

### **Location of Services**

Services will be offered via telephone, email and in person at 1800 Market Street, regular business hours.

### **Selection**

The selection for the Guaranteed Income pilot is a sole source, as BALA is named in the application

### **Funding**

Funding is provided through State funding.

### **ATTACHMENTS**

Appendix A: Services to be Provided

Appendix B Program Budget

Sole Source Approval Memo and Form

**Appendix A**  
**Services to be Provided**  
**Bay Area Legal Aid**  
**Guaranteed Income Benefits Counseling**  
**July 1, 2023 to June 30, 2026**

**I. Purpose of Grant**

The purpose of the grant is to provide optional benefits counseling to prospective Guaranteed Income Pilot (GI) participants.

**II. Definitions**

CARBON	Contracts Administration, Reporting and Billing On Line System
DHS	San Francisco Department of Human Services
FCS	Family & Children's Services Division
GI	Guaranteed Income
Grantee	Bay Area Legal Aid

**III. Target Population**

All residents of San Francisco, specifically emancipating Non-Minor Dependents and Former Foster Youth ages 21+ up to 24<sup>th</sup> Birthday.

**IV. Description of Services**

BALA will directly provide benefits counseling to all participants residing in the Bay Area. At a minimum, benefits counseling shall be available prior to enrollment in GI program. While many of the benefits programs potentially impacted by GI payments follow the same state and federal rules, BALA has expertise in county-specific benefits programs, such as General Assistance.

Most benefits counseling services can be provided remotely, by phone and through sharing documents via email, etc. When in-person services are necessary, BALA can meet with participants at one of its regional offices.

If a participant resides outside the Bay Area, BALA will provide information to the participant related to GI payments and public benefits by phone or email and screen for any legal issue presented by the GI payments and public benefits.

If a participant needs more in-depth legal assistance or representation, BALA will make a guided referral to the legal aid partner in the participant's county of residence.

- A. Grantee shall make benefits counseling available to all prospective GI recipients that will remain optional throughout the pilot period. At a minimum, benefits counseling shall be available prior to enrollment. Grantee shall provide their plan to provide

benefits counseling to CDSS, if not deemed sufficient as part of their response to the RFA.

- B. Benefits counseling shall be available to prospective GI recipients to:
  - 1. Provide information on how GI may impact recipients' access to public benefits—including but not limited to CalFresh and CalWORKs—including the potential eligibility risks and impact on benefit amounts associated with accepting GI funds;
  - 2. Support recipients in making informed decisions about whether to participate in the Program; and
  - 3. Benefits counseling shall be made accessible to individuals with disabilities in compliance with applicable civil rights laws, including, but not limited to the Americans with Disabilities Act of 1990 and accompanying regulations, Government Code section 11135, and Division 21 of the CDSS Manual of Policies and Procedures.
- C. Benefits counseling shall be made accessible to prospective GI recipients with limited English proficiency in compliance with civil rights laws, including, but not limited to Title VI of the Civil Rights Act of 1964, the Dymally-Alatorre Bilingual Services Act, Government Code section 11135, and Division 21 of the Manual of Policies and Procedures. Grantee shall effectuate counseling in languages other than English through the use of bilingual staff and/or contracted interpretation services.
- D. Any additional services offered and/or provided to program recipients and comparison group members by the Grantee or a partner of the Grantee shall be reported to the CDSS and/or the statewide evaluator.
- E. Grantee shall not require any benefits consultation or participation in other services or activities (including evaluation activities) as a condition for recipients to receive GI.

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

Services are provided Monday-Friday, during regular business hours (9 a.m. to 5 p.m.) at BayLegal's San Francisco office (1800 Market Street, 3<sup>rd</sup> Floor). Grantee staff shall be available for appointments and client engagement interviews via telephone, email and in-person.

## **VI. Deliverables**

- A. Provide benefits counseling to GI Pilot participants
- B. Represent GBI participants in administrative matters related to discontinuances or disruptions caused by receipt of GBI payments, where case has merit
- C. Attend local and statewide meetings on GBI, and participate in coalitions to develop best practices

- D. Engage in policy work on behalf of GI program recipients related to the intersection of GBI payments and public benefits programs
- E. Create a tool kit/participant facing materials to help people navigate and assess the potential impact of GBI on their public benefits

## **VII. Reporting Requirements**

- A. Grantee will provide a **quarterly** report of activities, referencing the tasks as described in Section VII, VIII and IX- Service and Outcome Objectives, and Surveys. Grantee will enter the quarterly metrics in the CARBON database by the 15th of the month following the end of the quarter.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VII, VIII & IX, Service and Outcome Objectives, and Surveys. 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 as required by the Department.
- D. For assistance with reporting requirements or submission of reports, the grantee will contact:

Johanna Gendelman  
Senior Contracts Manager [Johanna.Gendelman@sfgov.org](mailto:Johanna.Gendelman@sfgov.org)

Denard Ingram  
Acting Program Support Analyst [denard.ingram1@sfgov.org](mailto:denard.ingram1@sfgov.org)

## **VIII. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting deliverables.
- 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.

	A	B	C	D	E
1	<div style="text-align: right;">Appendix B, Page 1</div> <div style="text-align: right;">Document Date: 3/24/23</div> <div style="text-align: center;"><b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b></div>				
2					
3					
4					
5	Grantee Name		Term		
6	<b>BAY AREA LEGAL AID</b>		<b>7/1/2023 - 6/30/2026</b>		
7	(Check One)    New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.          No. of Mod.				
9	Program: <b>Guaranteed Income Counseling</b>				
10		<b>Y1</b>	<b>Y2</b>	<b>Y3</b>	<b>Total</b>
11	Budget Reference Page No.(s)	<b>7/1/2023 - 6/30/2024</b>	<b>7/1/2024 - 6/30/2025</b>	<b>7/1/2025 - 6/30/2026</b>	<b>7/1/2023 - 6/30/2026</b>
12	<b>Expenditures</b>				
13	Salaries & Benefits	\$79,703	\$39,810	\$40,225	\$159,738
14	Operating Expense	\$9,994	\$10,493	\$11,019	\$31,506
15	<b>Subtotal</b>	<b>\$89,697</b>	<b>\$50,303</b>	<b>\$51,244</b>	<b>\$191,244</b>
16	Indirect Percentage	18.62%	18.62%	18.62%	18.62%
17	Indirect Cost	\$20,523	\$11,509	\$11,724	\$43,756
18	<b>Total Expenditures</b>	<b>\$110,220</b>	<b>\$61,812</b>	<b>\$62,968</b>	<b>\$235,000</b>
19	<b>HSA Revenues</b>				
20	State grant	\$110,220	\$61,812	\$62,968	<b>\$235,000</b>
21					
22					
23					
24					
25					
26					
27					
28	<b>TOTAL HSA REVENUES</b>	<b>\$110,220</b>	<b>\$61,812</b>	<b>\$62,968</b>	<b>\$235,000</b>
29	<b>Other Revenues</b>				
30					
31					
32					
33					
34					
35	Total Revenues				
36					
38	Prepared by:		Telephone No.:		
39	HSA-CO Review Signature: _____				Date 5/9/2023
40	<b>HSA #1</b>				<b>11/15/2007</b>

11/15/2007







# SAN FRANCISCO HUMAN SERVICES AGENCY

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

Date: May 9, 2023  
To: Dan Kaplan, Deputy Director, HSA  
From: Esperanza Zapien, Director of Contracts, HSA  
RE: Sole Source Waiver request Admin Code 21.5(b): No substitute for product/service and only one source Bay Area Legal Aid (Vendor ID: 0000024621)

The Human Services Agency (HSA) respectfully requests the approval of the sole source waiver for Bay Area Legal Aid (BALA) for the provision of financial counseling services for eligible clients as part of California Department of Social Services (CDSS) Guaranteed Income Pilot Program. Bay Area Legal Aid is named as the contractor to deliver these services.

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On November 21, 2022, San Francisco Human Services Agency was selected as one of two counties to participate in the CDSS Guaranteed Income Pilot Program. The purpose of this program is to provide grants to eligible entities to administer pilot programs that provide guaranteed income to participants. The department will prioritize funding for pilot programs and projects that serve California residents who age out of the extended foster care program at or after 21 years of age or who are pregnant individuals.

As part of the grant agreement with CDSS, BALA will provide services including representation in administrative matters related to discontinuances or disruptions caused by receipt of GI payments, where the case has merit. BALA will engage in policy work on behalf of GI program recipients related to the intersection of GBI payments and public benefits programs. In addition, BALA will create a tool kit/participant facing materials to help people navigate and assess the potential impact of GBI on their public benefits. BALA will also attend local and statewide meetings on GI and participate in coalitions to develop best practices.



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

HSA proposes the following:

<b><u>Request:</u></b> Enter into a new agreement with Bay Area Legal Aid, to provide Guaranteed Income Financial Counseling services for the term July 1, 2023, to June 30, 2026, for the amount of \$235,000.
<b><u>Brief description of services:</u></b> BALA will provide financial counseling, legal services, and engage in policy work to support participants in the Guaranteed Income program.
<b><u>Duration:</u></b> A grant for three years. July 1, 2023, to June 30, 2026
<b><u>Justification for Sole Source:</u></b> Admin Code 21.5(b): No substitute for product/service and only one source (No bid required)

☒ Approved

☐ Disapproved



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DocuSigned by:

*Dan Kaplan*

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Dan Kaplan, Deputy Director of Administration and Finance

## Grant Solicitation Waiver Instructions

**WHEN TO USE:** For approval of grant solicitation waivers under [Administrative Code Section 21G.8](#), where:

- A competitive process is infeasible or impracticable
- A Public Purpose may reasonably be accomplished by one particular Grantee

Per the City Purchaser's Administrative Code Chapter 21G Rules and Regulations, this Waiver Form is **not required** for grants awarded in accordance with Administrative Code Sections:

- ☐ **21G.3(a)(1):** Grants to a governmental entity for programs, activities, or services that can be practically performed only by that particular entity
- ☒ **21G.3(a)(2):** Grants to a specific entity as required to comply with applicable law or contract, or as a result of the requirements of the funding source
- ☐ **21G.3(a)(3):** Grants made for improvement to property by a property owner
- ☐ **21G.8(c):** Grants to any of the four City-owned community cultural center

**INSTRUCTIONS:** Complete this Grant Solicitation Waiver Form to request approval to waive the competitive solicitation requirements under Administrative Code Section 21G.8. Provide specific and comprehensive information to justify why the requested grant should be awarded absent a solicitation. Attach appropriate/required supporting documentation.

The Grant Solicitation Waiver Form must be signed by the Granting Officer or their designee. The Solicitation Waiver must be fully approved before the department makes a commitment to the grantee, and before City funds are encumbered. If the Solicitation Waiver request is denied, the department must conduct a competitive process to select the grantee(s).

For extensions of Solicitation Waivers for a previously awarded sole source grant, attach a copy of all prior approved Solicitation Waivers or other sole source determinations by the relevant authority.

Submit Grant Solicitation Waiver Form for final approval as follows:

- **Granting Agencies under jurisdiction of a commission or board:** to the commission or board, recommending waiver of solicitation requirements for this grant award.
- **Granting Agencies with no board or commission:** to the Purchaser ([oca@sfgov.org](mailto:oca@sfgov.org)), who shall convene the Grant Consensus Committee<sup>1</sup> to review the request.

Once fully approved, upload this signed form, all supporting documentation, and commission, board, or Grant Consensus Committee final approval, as applicable, to PeopleSoft. Select the appropriate Purchasing Authority for the grant award in PeopleSoft.

<sup>1</sup> Representatives from the Controller's Office, Human Resources Department, Office of Contract Administration, and City Attorney's Office

## Grant Solicitation Waiver Form

<b>Department:</b> Human Services Agency	<b>Phone:</b> 415-557-5507
<b>Dept. Contact:</b> Johanna Gendelman	<b>Email:</b> Johanna.Gendelman@sfgov.org

<b>Request:</b> <input checked="" type="checkbox"/> New <input type="checkbox"/> Modification	<b>Grantee:</b> Bay Area Legal Aid	<b>Supplier ID:</b> 0000024621
<b>Short Description of Grant:</b>		

<b>Grant Amount:</b> \$235,000	<b>Grant Duration:</b> 36 months
(Attach itemized budget if available)	<b>Anticipated Dates:</b> From 7/23 To 6/26
<b>Describe the Public Purpose to be fulfilled by this Grant:</b> Provide voluntary legal and financial services to participants in Guaranteed Income Pilot	

### Justification for Waiver of Competitive Solicitation Requirements

Check the appropriate solicitation waiver reason and address the questions listed. Attach additional supporting documentation as indicated and/or as necessary.

- ☐ **Competitive solicitation infeasible or impracticable**
- Is this grant required to respond to a public emergency or other exigent circumstances? ☐ Yes ☐ No
  - If **YES**, provide a description of the public exigency or emergency, need for the sole source Grant and period of performance, and impact on the Public Purpose if the sole source Grant is not approved.
  - If **NO**, grant is not required to respond to public emergency or other exigent circumstance:
    - Why is a competitive process infeasible or impracticable?
    - Why is this the only entity that can fulfill this Public Purpose? What does the entity offer that is essential to fulfilling the Public Purpose?
    - What steps were taken to verify that this is the only entity that can fulfill this Public Purpose? Has the department contacted other entities to evaluate their ability to fulfill the Public Purpose, and if so, describe the entities and explain why they cannot meet the department's needs.
- ☒ **Public Purpose may reasonably be accomplished by one particular Grantee**
- Why this is the only entity that can fulfill this Public Purpose? What the entity offers that is essential to fulfilling the Public Purpose? See memo
  - What steps were taken to verify that this is the only entity that can fulfill this Public Purpose? Has the department contacted other entities to evaluate their ability to fulfill the Public Purpose, and if so, describe the entities and explain why they cannot meet the department's needs.
  - Is this a recurring Grant to the same recipient? ☐ Yes ☒ No
  - If **YES**: How long has this entity fulfilled this Public Purpose for the department?
    - Has department conducted a formal or informal competitive process within the last five years demonstrating lack of other potential Grantees, pursuant to Admin Code §21G.8(b). ☐ Yes ☒ No
    - Solicitation document(s), result(s), and other supporting documentation attached? ☒ Yes ☐ No

### Grant Solicitation Waiver request is recommended by:

Grants Officer (Dept Head) or Designee Name: Dan Kaplan

Grants Officer (Dept Head) or Designee Signature:

DocuSigned by:

*Dan Kaplan*

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Date: 5/9/23