



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

MEMORANDUM

Department of Disability
and Aging Services

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 4, 2024

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

SUBJECT: NEW CONTRACT: **FINDHELP (FOR PROFIT)** TO PROVIDE
THE DAS ONLINE RESOURCE DIRECTORY

CONTRACT TERM: 1/1/25 – 6/30/29

| | | | |
|-------------------------|---------------------------|---------------------------------|-------------------------------------|
| CONTRACT AMOUNT: | <u>New</u> \$1,727,000 | <u>Contingency</u> \$172,700 | <u>Not to Exceed</u> \$1,899,700 |
|-------------------------|---------------------------|---------------------------------|-------------------------------------|

ANNUAL AMOUNT: See table below



London Breed
Mayor

| Funding Source | <u>County</u> | <u>State</u> | <u>Federal</u> | <u>Contingency</u> | <u>Not to Exceed</u> |
|-----------------------|---------------|--------------|----------------|--------------------|----------------------|
| FUNDING: | \$1,727,000 | | | \$172,700 | \$1,899,700 |
| PERCENTAGE: | 100% | | | 100% | |

Trent Rhorer
Executive Director

The Department of Disability and Aging Services (DAS) requests approval of a sole source waiver and authorization to enter into a new sole source contract with Findhelp for the period of January 1, 2025 through June 30, 2029, in an amount of \$1,727,000, plus a 10% contingency for a total amount not to exceed \$1,899,700. The purpose of the contract is to provide the DAS Online Resource Directory and the DPH Closed Loop Referral System.

| | 1/1/25-6/30/25 | 7/1/25-6/30/26 | 7/1/26-6/30/27 | 7/1/27-6/30/28 | 7/1/28-6/30/29 | Total | Contingency | Not to Exceed |
|---------------|------------------|------------------|------------------|------------------|------------------|--------------------|------------------|--------------------|
| DAS | \$124,500 | \$217,500 | \$186,000 | \$186,000 | \$186,000 | \$900,000 | \$90,000 | \$990,000 |
| DPH | - | \$240,500 | \$195,500 | \$195,500 | \$195,500 | \$827,000 | \$82,700 | \$909,700 |
| Totals | \$124,500 | \$458,000 | \$381,500 | \$381,500 | \$381,500 | \$1,727,000 | \$172,700 | \$1,899,700 |

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. In addition, several workgroups of the Long-Term Care Coordinating Council, including the Palliative Care and Dementia Care Workgroups, as well as the Age and Disability Friendly Task Force have expressed interest in a dynamic and interactive resource directory.

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 Findhelp. As a result, DAS and DPH will use the same vendor for this service.

Services to be Provided

Findhelp will develop separate Online Resource Directories (ORD) for the Department of Disability and Aging Services (DAS) and the Department of Public Health (DPH). The ORD will also coordinate electronic referrals and case management tasks in DAS and DPH’s existing systems of records.

These resource directories will be developed by Findhelp through partnerships with local organizations, including 211s and United Way Worldwide, and will both be supported and maintained by Findhelp’s Ongoing Customer Support team.

For a detailed breakdown of service components, please see Appendices A and A-1: Services to be Provided.

Selection

Contractor was granted a Sole Source Waiver approved on October 24, 2024.

Funding

Funding for this contract is provided through County General Funds. The funding for DPH will be provided by workorder agreement between the two departments.

ATTACHMENTS

Appendix A – Services to be Provided – DAS

Appendix D – Calculation of Charges – DAS

Appendix A-1 – Services to be Provided – DPH

Appendix D-1 – Calculation of Charges – DPH

Sole Source Waiver

**Appendix A
Services to be Provided
FindHelp**

**Online Resource Directory
January 1, 2025 – June 23, 2029**

I. Purpose of Contract

The purpose of this contract is to provide an online resource directory (ORD) to help connect San Francisco older adults and adults with disabilities to services, resources, and providers citywide. The ORD will serve as a searchable repository of resources spanning a wide range of service domains, including healthcare, housing, caregiving assistance, public benefits, and social and recreational spaces.

II. Definitions

| | |
|------------|--|
| CBO | Community Based Organization |
| Contractor | FindHelp |
| COIT | Committee on Information Technology |
| DAS | Department of Disability and Aging Services |
| DPH | San Francisco Department of Public Health |
| IT | San Francisco Human Services Agency's Information Technology Department |
| ORD | Online Resource Directory |
| PHI | Protected Health Information |
| PII | Personal Identifiable Information |
| REaL | Race, Ethnicity, and Language |
| SDoH | Social Determinants of Health |

| | |
|--------------|---|
| SFHSA | Human Services Agency of the City and County of San Francisco |
| Service Unit | Deliverables, See Scope of Work |
| SOGI | Sexual Orientation and Gender Identity |

III. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

The target audience will be individuals seeking services and/or resources for older adults and people with disabilities in San Francisco, various City departments (i.e DAS, DPH, HSA, etc.), independent healthcare organizations in San Francisco (Kaiser, Common Spirit, UCSF, Chinese Hospital, etc.), the San Francisco Veterans Administration (VA), and other private agencies.

IV. Description of Services

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

This Statement of Work defines the effort to develop an Online Resource Directory (ORD) for the Department of Disability and Aging Services (DAS) at the Human Services Agency for the City and County of San Francisco.

Project Task #1: Online Resource Directory (ORD) Project Management

Task #1 Deliverables

- Prepare project plan and strategy to include at least but not limited to the following:
 - o Timeline
 - o Identify activities.
 - o Identify milestones.
 - o Identify deliverables.
 - o Assign resources.
 - o Provide estimates.

- Conduct regular status meetings.
- Schedule testing in a preproduction environment and launch to production
- Create and schedule training.
- Reports
- Post-launch plan

Project Task #2: Public Resource Directory Configuration and Customization

- Customize look and feel according to DAS and SFHSA brand standards
- Configure landing page and service categories/menu taxonomy
- Flag programs as prioritized, included, and excluded in the resource directory
- Develop, host, and maintain website based on business and functional requirements sections below, as well as any new requirements identified in project task #2.
- Where applicable, work with HSA to integrate/embed online resource directory with HSA and/or CCSF websites.

Task #2: Deliverable

- A fully functional website in a pre-production environment that meets all the functional, business, security, and design requirements listed in requirements sections.

Project Task #3: Integration with HSA/DAS System of Record (SoR)

Work with HSA/DAS and external vendor to develop and implement technical integration that:

- Captures data about referrals through FindHelp in the SoR
- Allows DAS staff to refer through FindHelp within the SoR
- Notifies DAS about received referrals from FindHelp

Task #3: Deliverable

- Launch based integration between SoR and FindHelp that meets all functional, business, security, and design requirements listed in the requirements section

Project Task #4: Training for internal users at HSA/DAS

Develop, document, and provide training to internal DAS and HSA staff to searching and navigating resources and referrals within the system

- Develop, document, and provide training to internal DAS/HSA staff to
 - Configure landing page and service categories/menu taxonomy
 - Flag programs as prioritized, included, and excluded in the resource directory
 - Report erroneous information
- Develop, document, and provide training to internal DAS/HSA staff to use data and data tools

Task #4: Deliverable

- Training toolkits
- Conduct & record training sessions
- Provide recorded trainings to HSA for duration of contract

Project Task #5: Training for Community-Based Organizations, Resources, Providers

- Develop, document, and provide training to Community Based Organizations to find resources and make referrals within the software
- Develop, document, and provide training to use data and data tools
- Develop, document, and provide training Report erroneous information

Task #5: Deliverables

- Training toolkits
- Conduct & record training sessions
- Provide recorded trainings to HSA & CBOs for duration of contract

Project Task #6: End User Support

- Develop and document process to provide technical support to end users. Proposer must have a documented process to provide technical assistance to online users. The document is to be referred to as End User Support Agreement.

Task #6: Deliverables

- End User Support Agreement.
- Customer Technical Support Agreement.

Project Task #7: Contractor Responsibilities

- Develop and document processes for supporting HSA (IT and DAS) with technical and administrative help. Proposer must have a documented process for aiding HSA IT and DAS with technical escalation and assistance. The document is to be referred to as Service Level and Client Support Agreement.
- Establish and document contractor ongoing support responsibilities for maintaining and upgrading website, including software patching, mitigating compliance and security issues, upgrading, and monitoring the website performance.
- Establish and document process to notify HSA about upcoming feature and usability changes

Task #7: Deliverables

- Service Level and Client Support Agreement.

Project Task #8: Access to Data

- Provide SQL database access to all underlying data

Task #8: Deliverables

- Integration into HSA/DAS system of record
- Comprehensive data dictionary and data model
- Access to FindHelp dashboards
- Data should be refreshed at least daily and meet the following requirements at a minimum:
 - o Visibility into the activities of CBO network
 - o Visibility into DAS activities (this may be accomplished through SoR integration)
 - o User activity data about:
 - Volume
 - User searches (volume and free text), reporting on searches with 0/low results
 - Referrals, including completion rate
 - Saves/shares/notes
 - Suggestions/reports on incorrect information, as well as time to remediate
 - o Ability to segment data (where available) on:
 - Location (zip code/neighborhood)
 - Demographic information (could be on a user record level or filter usage within the tool)
 - Language usage (site translation and resource language)

Project Task #9: Go-Live activities

- Perform technical go-live activities, including testing on pre-production environment(s)
- Assist HSA with executing communication plan.
- Conduct project closure meeting.
 - o Assurance that all the work has been completed,
 - o Assurance that all agreed upon project management processes have been executed.
 - o Document lessons learned.

Task #9: Deliverables

- Fully functional ‘live’ pre-production testing website
- Fully functional ‘live’ production website
- Provide written and formal recognition of the completion of a project.

V. Business Requirements

| REQUIREMENTS |
|---|
| Design & Features |
| Minimalist design. The ORD should avoid visual flourishes or longwinded text that may overwhelm site users. Site features should be clean and simple, directing users’ attention to the key site functions. |
| Human-centered design - The ORD design must empower people to easily make decisions relating to their interests, health, and well-being. |
| Main page with 2 search options: search bar, resource categories- Site users should be able to start their search for resources from three different starting points. The resource categories should form a “table of contents,” or a high-level array of all service and resource types available by relevance, taking into account user and resource location, distance, matched eligibility, matched service offerings, and any selected filters. |
| Screening Tools - The FindHelp Platform must support standard SDoH (Social Determinants of Health) assessment protocols such as PRAPARE and the Accountable Health Communities (AHC) Health-Related Social Needs (HRSN) Screening tool. The system should be extensible and customizable to support the needs of various City departments. The Findhelp Platform must be capable of supporting alignment with the SDoH data definitions provided through HL7 and The Gravity Project for all social determinants. |
| Subcategory pages - Clicking into one of the resource categories (Food & Nutrition, etc.) will take the site user to a subcategory page that further differentiates the kinds of services/resources within the larger category (food banks, free lunch programs, etc.). The taxonomy of resource categories must be customized at DAS’s direction. |
| Organizational pages with key site information - Each individual resource should display details with key information in a standardized format (services/programs provided, hours of operation, languages spoken, eligibility requirements, address, contact information, accessibility options, capacity, etc.) listed in a standardized format. |
| Map-based search pages - Clicking into a subcategory should take the user to an interactive map that displays the geographic location of relevant resources and services. |
| Contact information for DAS Benefits & Resources Hub and Aging and Disability Resource Center (ADRCs) listed on all pages - In case site users need clarifying information |

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| <p>or guidance from another person, most pages on the ORD should provide the phone number to the DAS Benefits and Resource Hub or invite site users to look up the closest Age and Disability Resource Center.</p> |
| <p>Internet accessible - The ORD must be accessible via internet-connected devices, including computers, smartphones, and tablets.</p> |
| <p>Mobile-first UX (user experience) - Clients may not have computers or tablets, but most may have mobile smartphones. The mobile device experience should have all of the same functionality as the desktop experience.</p> |
| <p>Filtering tools to tailor searches - Site users should be able to narrow their searches by specifying criteria, such as languages spoken, types of insurance accepted, eligibility requirements, location, accessibility, LGBTQIA+ (lesbian, gay, bisexual, transgender, intersex, queer/questioning, asexual and many other terms (such as non-binary and pansexual), etc.</p> |
| <p>Search bars with auto-complete capabilities - Automatic completion of key terms can help site users look up information on resources that are harder to spell.</p> |
| <p>Log-in capabilities for consumers and service/health providers - User profiles can help consumers and their families keep track of their searches for individual resources, and providers (e.g., community-based organizations, health care providers, clinicians, etc.) could send information about specific resources to consumers. User profiles should be confidential and protected, so that one user cannot access another user’s profile information.</p> |
| <p>Ability for all site users to submit feedback and corrections - The ORD should contain a tool for consumers and providers to provide corrective information, missing resources, and/or feedback on substandard resources.</p> |
| <p>HSA Style Guide - Landing page of the ORD must have the look and feel of the HSA public website using the style guide which will be provided.</p> |
| <p>Data Management</p> |
| <p>Service Providers/Resources. A minimum of 250 service providers must be included in the online resource directory with minimum required fields (metadata):</p> <ul style="list-style-type: none"> • Name • Phone • Address(es) • ADA accessibility • Languages: English, Spanish, Chinese, Tagalog, Russian, Vietnamese • Service(s) as described in the table below • Hours of operation • License or certificate (if applicable) • Website (if available) • Fees (if applicable) • Area served/neighborhood • Short description (if available) • Population(s) served • Client eligibility requirements (if applicable) • Insurance Type • Availability – wait list; closed to new referrals • Hidden fields for view by HSA Admin only, such as active/inactive state, comments, etc. • Other fields - TBD |

Contractor data management:

1. **Pre-launch: import and verify current list of Service Providers/Resources and associated fields.** Verify information from DAS. Import all data to the ORD.
2. **Maintain and update resource data.** The services/resources listed in the online resource directory must be maintained and updated regularly by the contractor. Both Service Providers and Resources should be validated at least annually. If a service provider or resource is no longer valid, FindHelp will determine if the resource should remain or be removed from the directory. This resource directory is developed through partnerships with local organizations, including 211s and United Way Worldwide and through the work of Contractor’s own internal resource directory team. The resource directories are supported and maintained through those partnerships and through Contractor’s own active maintenance team, and through Contractor’s engagements directly with the organizations listed.
3. **Suspend/activate Service Providers/Resources.** Provide a process by which HSA can submit a request to suspend Service Providers/Resources. Provide a process by which HSA can submit a request to recreate a suspended Service Provider/Resource. Contractor must respond to HSA suspension/reactivation request within 3 business days. Suspension must include documented reason.
4. **Update resource data on request.** Provide a process by which HSA and/or CBOs can submit a request to update Service Providers/Resources. Contractor must respond to HSA data update requests within 2 business days

Additional Content

Glossary and definitions of commonly misunderstood programs/terms. Subcategory pages should include definitions or descriptions of resources that some site users might not recognize on their own, or might confuse with another, similar kind of resource.

Benefits enrollment and application instructions tailored to the service population. ORD pages that link site users to applications (affordable housing, Medicare, etc.) located on other sites should include key information relevant to the service population.

Resources and information for caregivers, social workers, and case managers. The ORD should include information tailored for individuals who access the site on another person’s behalf and include resources that benefit or serve caregivers.

Tutorial guide or “Help” page. A built-in tutorial on how to use the ORD, such as an instructional video, can help users who are less proficient with computer technology familiarize themselves with the site

Accessibility

ADA-compliant design, adjustable text size, and considerations for mobile devices. The ORD must be accessible to site users with impaired vision and must abide by federal standards for disability access. Guidelines must also be applied to mobile devices.

Multilingual. Interface and content must be provided in HSA’s 6 languages: English, Spanish, Chinese, Filipino, Russian, Vietnamese. All vital content must be translated by humans.

Hosting / Support / Security

Hosting. Vendor will maintain, manage, and host the development, server, security, storage, network, and other infrastructure required to support the Online Resource Directory

Uptime/Availability. Vendor will provide the following website, system, data availability/uptime depending upon the type of data stored in the online resource directory.

Minimum Uptime/Availability:

- Three 9’s (99.9%) or greater baseline for most data.
- Six 9’s for healthcare, public safety, financial information, airport, or enterprise department/utilities the City requires a 99.9999 availability.

Availability does not include scheduled maintenance, patching, or disaster recovery testing.

Legend:

- Three 9’s – 99.9% approximately equates to: RPO 8 hours / RTO 6 hours / WRT 2 hours / MTD 8 hours annually.
- RPO – Recovery Point Objective: Defines the maximum age of the restored data after a failure. Defines how much data in terms of time can be lost.
- RTO – Recovery Time Objective: Defines the maximum time to restore the service. Defines how much time can go by before the service/data is restored.
- WRT – Work Recovery Time: Defines how long it takes the recovered service to be brought into Production and begin serving clients/customers again.
- MTD – Maximum Tolerable Downtime: Sum of the RTO and WRT, which is the total time required to recover from a disaster and start serving the business again.

Disaster Recovery / Business Continuity. Contractor will provide documented business continuity and disaster recovery plans. Contractor will, at a minimum, annually test each plan. Contractor will provide HSA annual results of testing.

Data. Where allowed by law or regulation, HSA applicable services/programs provided, hours of operation, languages spoken, eligibility requirements, address, contact information, accessibility options, capacity, or other data shall be made available to HSA (and other entities HSA approves of) on demand through the use of the launch integration to the ORD or via browser.

Privacy and Security. Client Personal Identifiable Information (PII)/ Protected Health Information (PHI) must be securely maintained. Client PII/PHI is considered “Level 4” data under the Committee on Information Technology (COIT) data classification standard, and so strong cybersecurity controls will be considered a compliance requirement that must be met throughout the duration of the contract. Refer to Article 13 of this Agreement for more information.

General End User Website Support. Contractor shall provide end user support via phone, web, email, or other appropriate mediums.

Customer Support. Contractor shall provide HSA with an assigned customer support relationship manager or comparable to handle escalations and consult with. Contractor shall provide a systematic process for HSA to report issues, bugs, or requests for new services. All requests submitted through the system must be provided to HSA in a monthly report. Customer Support shall be available to HSA from 8AM-5PM Monday – Friday, excluding major holidays.

Reporting

Ability for managers and operational leaders to view which services were selected. The software should provide key metrics of user engagement, search volume, referrals volume, referrals completed (aka service reached), etc.

Website Metrics. Page views, sessions, event tracking (goal/journey completion), resource access. Segmented by: language, location, demographics (where available) and device type

Ability for SFHSA to view and analyze service providers/resources. The software should allow SFHSA staff to produce reports about the content of the ORD, including demographic, location, and other metadata as described in the Data Management section.

| TYPES OF SERVICES TO BE INCLUDED (this list is not meant to be exhaustive) |
|---|
| Adult Day Programs – community-based centers that provide social activities, nutrition, and supervision, as well as respite for caregivers |
| Adult Protective Services – investigates possible abuse and neglect of older adults and adults with disabilities, and provides short-term case management |
| Age & Disability Resource Centers - information and service referrals for older adults and people with disabilities including language assistance |
| Assisted Living Facilities - residential facilities for people needing assistance with activities of daily living on a 24-hour basis |
| Behavioral & Mental Health Services – services available for older adults and people with disabilities who have behavioral and/or mental health needs |
| Caregiver Services – services for people caring for others that include respite, counseling, legal services, training, and support groups |
| Case Management – navigation and coordination of needed services that include transitional, long-term, and/or intensive coordination or management in order to maintain people in the community |
| Community Service Centers – site-based centers providing social activities |
| Dementia Services – programs and services designed specifically for people with Alzheimer’s or other types of dementia |
| Education and Training Services – education covering a variety of needs including but not limited to dementia, chronic disease self-management, caregiving, elder abuse prevention |
| Employment Training and Support – subsidized job placements and other job-related supports |
| Food & Nutrition – congregate meals, home-delivered meals, food pantries, home-delivered groceries, nutritional counseling, and education |
| Housing Support – housing subsidies, supportive services, counseling and advocacy |
| Home Care Services – includes In-Home Supportive Services and Support at Home as well as private duty services and emergency short-term services; provides home care workers to assist in the home with activities of daily living and household chores |
| Money Management - assistance to consumers in the management of income and assets |
| Medical Services – information on services and resources specializing in older adults and/or adults with disabilities; services and resources available to people who have been diagnosed with a serious illness; access to healthcare, including dental |
| Legal Services – legal counseling and representation, naturalization assistance, including end of life |
| LGBTIQA+ Services – services and support for the LGBTIQA+ population |
| Loneliness/Isolation – programs and services that help prevent loneliness and isolation |
| Palliative Care Services – connections to services and supports designed to improve the quality of life of clients and their families facing the problems associated with a serious illness |
| Paratransit Services – transportation services available to consumers who are unable to use public transportation systems |

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| Public Benefits – including CalFresh, Medi-Cal, general assistance, etc. |
| Public Administrator – investigates and resolves the estate of people who die without known next of kin |
| Public Conservator – provides mental health conservatorship due to grave disability |
| Public Guardian – conservatorship to people who are substantially unable to provide for their own personal needs |
| Technology Resources and Training – customized training, provision of loaner tablets and training and technical support |
| Veteran Services – benefits and supportive services available to veterans and their dependents |
| Village Programs – non-site-based community and neighborhood networks |
| Volunteer Services – programs and services available for volunteer opportunities |
| Wellness & Exercise – physical fitness |

**Appendix A-1
Services to be Provided
Findhelp**

**Closed Loop Referral Platform & Closed Loop Referral Implementation
July 1, 2025 – June 30, 2029**

I. Purpose of Contract with Findhelp is to enable a Closed-Loop Referral process between San Francisco DPH and community agencies. Findhelp will integrate with DPH’s EHR, Epic, to provide the connection to community resources for the patients’ social needs and ensure that the patient receives the services they need.

II. Definitions

| | |
|--------------------------------------|--|
| City | City and County of San Francisco, a municipal corporation |
| Contractor | Findhelp |
| DPH | San Francisco Department of Public Health |
| DAS | San Francisco Department of Disability Aging Services |
| HSA | San Francisco Human Services Agency |
| Closed Loop Referral | A closed-loop referral is a system process that connects SFDPH patients with community resources and tracks whether they receive the services to which they were referred. It's often used to address health-related social needs, such as food insecurity, housing, or transportation issues. |
| Social Determinates of Health (SDoH) | Social determinants of health (SDOH) are the non-medical factors that affect a person's health and quality of life. These factors include the conditions in which people are born, grow, work, live, and age, as well as the broader systems that shape their daily lives. |
| CBO | Community-Based Organization |
| EHR | Electronic Health Record. DPH uses the Epic EHR. |
| CRD | Community Resource Directory. This is a specific feature within the Epic EHR that formats and presents community resources, service details, and contact information within the Epic EHR system. |
| CRN | Community Resource Network. This is a specific feature within the Epic EHR that utilizes HL7 FHIR APIs to communicate Closed-Loop Referral information to third-party applications such as Findhelp. |

| | |
|--------------------------|--|
| HL7 | Health Level 7 is a set of international standards used to provide guidance with transferring and sharing data between various healthcare providers. |
| FHIR | Fast Healthcare Interoperable Resources is set of rules and specifications for exchanging electronic health care data. |
| API | Application Programming Interface is a set of protocols and definitions that allow software applications to communicate with one another. |
| CalAIM | California Advancing and Innovating Medi-Cal is a five-year initiative by the California Department of Health Care Services. |
| Enhanced Care Management | A sub-program under CalAIM that provides for case management services for covered members of the health plan. |
| Community Supports | A sub-program under CalAIM that provides for referral-based, non-health care services for covered members of the health plan. |

III. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- CalAIM Patients that qualify for Enhanced Care Management and Community Supports
- Patients in the Whole Person Integrated Care (WPIC) Program
- Patients in DPH Behavioral Health Programs
- Patients in DPH Primary Care and Specialty services with SDoH needs

IV. Description of Services

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

EnterprisePlus Initial Launch Professional Services

The EnterprisePlus Initial Launch Professional Services fee supports network landscape analysis, project discovery, workflow design and configuration, and implementation for DPH users. The implementation line item covers the implementation of the EnterprisePlus Platform. The implementation timeline is to be mutually determined by DPH and Findhelp; the total implementation period shall not exceed 6 months from the start date (as mutually agreed upon).

EnterprisePlus Platform & Included Platform Support

The EnterprisePlus Platform & Included Platform Support fee covers web-based license to the Findhelp platform as well as account management, training, and technical support. This fee also supports access to and maintenance of the coordinated community network powered by the Findhelp platform. EnterprisePlus Platform includes the Findhelp's Closed-Loop Referral functionality.

Ongoing Customer Support

Ongoing customer support provides quarterly executive business review with a Findhelp Customer Success Manager (CSM). Includes metrics review, goal setting, and action planning with Customer

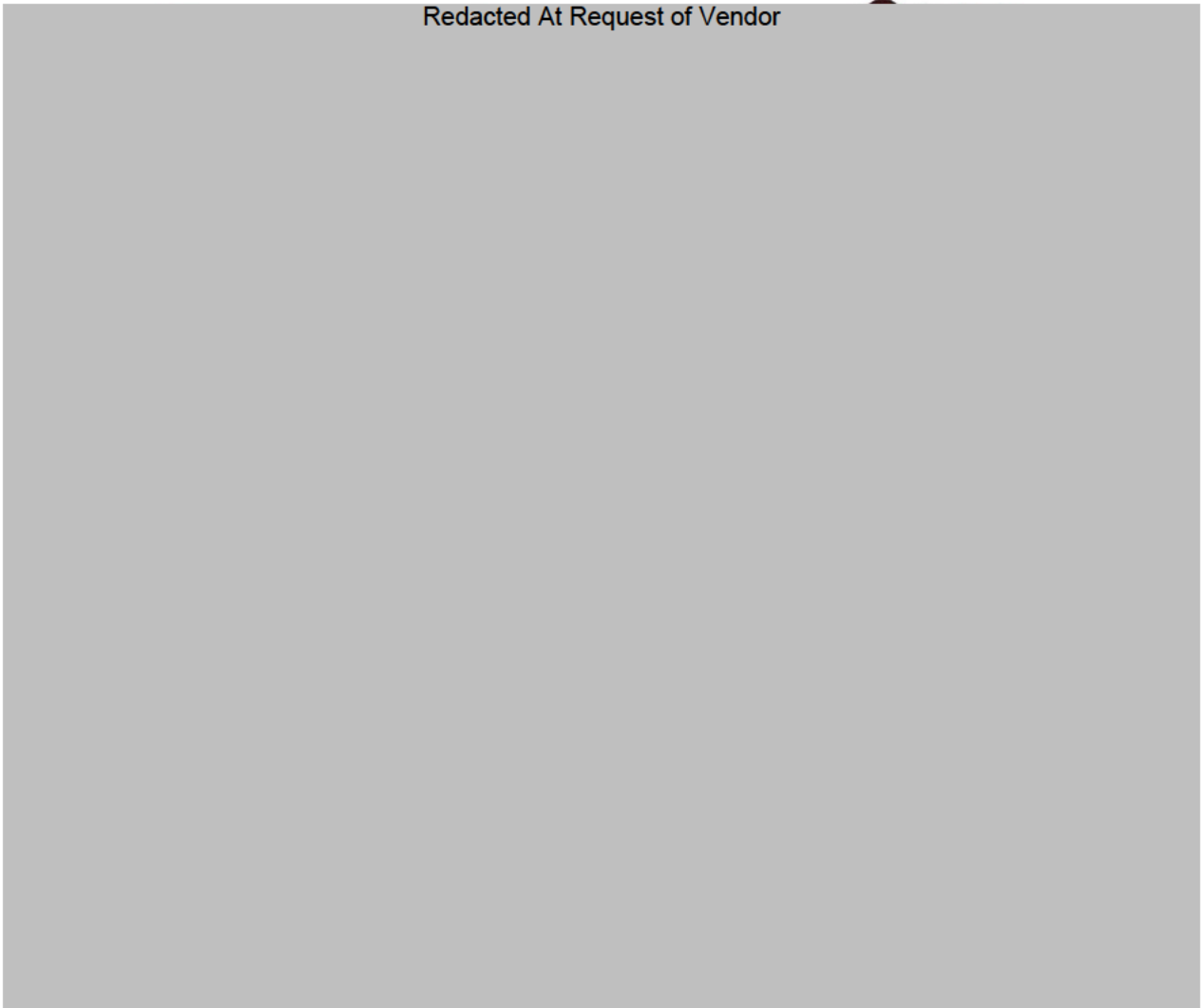
team. The fee is inclusive of all community engagement activities, strategic planning, and support for community-based organizations participating in the network.

Integration

FindHelp Epic Integration Native+

The Epic Integration (Native+) fee covers the ability to access the Findhelp resources via the Epic Community Resource Directory functionality through DPH's existing EHR system Epic. Findhelp supports the advancement of standards-based exchange and enables this integration using FHIR specifications. The Findhelp integration functionality and API standards can be found on the Findhelp Native+ page of Epic Showroom (<https://showroom.epic.com/Listing?id=159&returnTitle=3>). Findhelp integration includes Epic "Community Resource Directory (CRD)" import and a "Community Resource Network (CRN)" API specification. Integrations using the Epic CRD or CRN specifications will allow for Epic EHR users to conduct native search and referral workflows via Findhelp's network directly within Epic and are able to send referrals out of Epic directly to select nonprofits using Findhelp. DPH Epic users can still refer to programs found in the CRD that do not accept Findhelp Closed-Loop Referrals. Program information can be printed and handed to the patient. Additionally, status updates for Closed-Loop Referrals made in Findhelp are reflected in Epic, verifying that the patient has received services and the completed the Closed-Loop Referral process.

Redacted At Request of Vendor



Findhelp Automated Program Recommendations Integration

Completed SDoH screenings for a patient generate automatic program recommendations to inform referral selections and social care goals. Screening results can highlight featured or contracted programs so City can direct referrals to your trusted partners.

Reporting and Analytics

SQL Data Warehouse

Findhelp will provide access to SQL Data Warehouse to deliver reporting on all activity across DPH's instance of Findhelp. This will include:

Site Activity: how many and what type of people are interacting with the platform; how are these users engaging with the platform; what are the trends over time around users and their engagement.

Search Activity: what are the general search trends in terms of volume, search term, and geography; where are there unmet needs; how have searches changed over time.

Referral Activity: how many referrals have been made; for how many individuals; what is the status of the referrals; were people able to get help; which program locations are referred to most frequently; are people able to get help.

Site Referral details: who are the individuals who have helped through the platform; what are the program locations, provider, and helper details of each referral that is being sent

Program Summary: how any programs are available in a given service area; what programs are most engaged

Group and Navigator Activity: How often are groups and/or individuals using the site; what group(s) is an individual user a part of; how are authorized users using the platform

Assessment Activity: how many assessments were submitted over time; how many people were assessed; what proportion had a need identified; what social needs trends were observed

Site Assessment Details: who are the individuals who have been assessed; what are the individual patient, social needs, and staff details of each assessment that is being completed

Community Engagement - Professional Services Advanced Support

Ongoing Community Based Organization [CBO] engagement strategy and support from a shared service Community Engagement Manager. If CBOs are not onboarded to the Findhelp platform, there is no ability to perform Closed-Loop Referrals; there is no one to receive them. These services focus on engaging the most important CBOs, as directed by City, including DPH, HSA, and DAS, to onboard the CBO to Findhelp. Services provide for outreach planning, contracting with the CBOs, and system onboarding to Findhelp for the CBOs. CBOs are only required to onboard to Findhelp once in order to communicate with any entity, including the City, who is using Findhelp.

V. Location and Time of Services

Location: State of California

Planned Timeline of Contract: 7/1/2025 to 6/30/2029

VI. Deliverables

During the Findhelp Implementation period, Findhelp shall meet the following deliverables:

| Implementation Services |
|---|
| Closed Loop Referral Project Management: Prepare project plan and strategy to include at least but not limited to the following: |

| |
|---|
| <ul style="list-style-type: none"> • Timeline • Identify activities • Identify milestones • Identify deliverables • Assign resources • Provide estimates\ • Conduct regular status meetings • Schedule launch • Create and schedule training • Provide Reports • Create post-launch plan |
| <p>Implement and Integrate the Findhelp services platform with SFDPH’s EHR, Epic. This includes live-in-production-environments, functioning interfaces for:</p> <ul style="list-style-type: none"> • Epic Native+ • Automated Program Recommendations • Access to the SQL Data Warehouse |

VII. Support and Services After Implementation

On an annual basis/During the grant/contract term, Findhelp will meet the following services and support:

| Platform Subscriptions & Support | |
|----------------------------------|--|
| Selected ✓ | EnterprisePlus Platform One (1) Customer Branded Staff Site and One (1) Customer Branded Community Site |
| Selected ✓ | SQL Data Warehouse |
| Selected ✓ | Epic Integration (Launch) |
| Selected ✓ | Automated Program Recommendations Integration |
| Selected ✓ | Epic Integration (Native+) |
| Selected ✓ | <p style="text-align: center;">Included Platform Support</p> <p>In addition to ongoing updates, standard support and maintenance, and updates of the Findhelp Platform:</p> <ul style="list-style-type: none"> • support.findhelp.com; the comprehensive Findhelp self-service portal includes online training, release notes, and basic troubleshooting steps • support@findhelp.com and to assist with support concerns and unique reviews. |
| Selected ✓ | <p style="text-align: center;">Ongoing Customer Support</p> <p>With collaboration and cooperation from the Customer team:</p> |

| | |
|---|---|
| | <ul style="list-style-type: none"> • Quarterly executive business review with a Findhelp Customer Success Manager (CSM) - includes metrics review, goal setting, and action planning with Customer team to continue to have successful upcoming quarters. • Consistent strategy and project plan check-in calls with your CSM - best practice is bi-weekly or monthly • Recommendations on best practices and guidance around KPIs and outcomes • Hands-on guidance for technical configuration support, including configuration updates, workflow design and troubleshooting. • CSM support via email and phone to navigate platform issues and troubleshooting. • Network Curation Program Management - ongoing maintenance |
| <p>Selected ✓ for one year</p> | <p>Community Engagement - Professional Services Advanced Support Ongoing CBO engagement strategy and support from a shared service Community Engagement Manager, with collaboration and cooperation from the Customer team. Includes:</p> <ul style="list-style-type: none"> • Marketing campaigns and awareness generation for newly listed and claimed CBOs • Search and referral analysis, and preferred partner recommendations • Advisement on nonprofit trends and best practices for partnership • Customer training on outreach, platform onboarding, workflow analysis, etc. |

| <p style="text-align: center;">Additional Optional Features & Services</p> | |
|---|--|
| <p>Optional</p> | <p>Community Engagement -Professional Services – Upgrade to Augmented Support <i>*requires first purchasing the Community Engagement Professional Services – Advanced Support</i> CBO engagement managed strategy and support from a Community Engagement Manager, with collaboration and cooperation from the Customer team. Including:</p> <ul style="list-style-type: none"> • Onboarding of agreed upon number of trusted CBO partners (up to 50 programs) • Managed outreach to local CBOs to join the customer network • CBO training on customer site (101 + 102 training) • CBO workflow analysis, design, + customized training • Staff education and support of platform configuration to best highlight and work with trusted CBO partners • Ongoing work with Customer staff and CBOs to improve workflows, process, and outcomes • Quarterly progress reports on network status and best practice recommendations • Creation of a long-term network sustainability plan, outlining recommendations e.g. staff needs for network maintenance and expansion after initial onboarding period. |
| <p>Optional</p> | <p>Community Engagement - Professional Services Advanced Support Ongoing CBO engagement strategy and support from a shared service Community Engagement Manager, with collaboration and cooperation from the Customer team. Includes:</p> <ul style="list-style-type: none"> • Marketing campaigns and awareness generation for newly listed and claimed |

| | |
|-----------------|--|
| | <p>CBOs</p> <ul style="list-style-type: none"> • Search and referral analysis, and preferred partner recommendations • Advisement on nonprofit trends and best practices for partnership • Customer training on outreach, platform onboarding, workflow analysis, etc. |
| Optional | <p>Additional Services:</p> <ul style="list-style-type: none"> • Branded Mobile App for a Community Site (iOS or Android) • Live Search Help • Premium Reports & Insights • Enterprise API Available to use within a Customer System (“System”) • Marketplace for Goods & Services Fulfillment • Custom Development • Non-standard Integrations and After Hours Technical Support • Ongoing Support & Services • Professional Services • Additional Staff Trainings |

| One-Time Implementation Services | |
|---|---|
| Selected ✓ | <p style="text-align: center;">EnterprisePlus Initial Launch Professional Services</p> <p>With collaboration and cooperation from the Customer team: Implementation and support from a Findhelp Customer Success Manager.</p> <ul style="list-style-type: none"> • Hands on implementation management, including project scoping, project plan development, meeting scheduling and facilitation • Best practices and guidance around KPIs and outcomes • Project plan management • Weekly PM calls, starting with Project Kickoff, continuing through Go-Live Readiness and Optimization Planning • Hands on technical configuration support, including subdomains, system integrations design and troubleshooting • System administrator training • Assessment design • Rollout schedule development • Rollout support and execution (including workflow scoping, training and optimization for each location) • 3 webinar trainings in first 6 months + train the trainer course • CBO engagement strategy and support from a shared service Community Engagement Manager |

VIII. Fiscal Guidelines

Availability of Funds to support this contract may be available through CalAIM Incentive Payment Program (IPP).

IX. Data Collection and Reporting Requirements

Findhelp will provide a monthly report of activities referencing the tasks as described in Section IV & VI covering the implementation period and implementation deliverables.

**Appendix D
Calculation of Charges**

**FindHelp
DAS Online Resource Directory
January 1, 2025 – June 30, 2029**

| Annual Fees | Year 1 (6 months) 1/1/25 – 6/30/25 | Year 2 7/1/25-6/30/26 | Year 3 7/1/26-6/30/27 | Year 4 7/1/27-6/30/28 | Year 5 7/1/28-6/30/29 |
|--|---|--------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------|
| EnterprisePlus Platform One (1) Customer Branded Staff Site and One (1) Customer Branded Community Site | \$62,500 (\$125,000 per year) | \$125,000 per year | \$125,000 per year | \$125,000 per year | \$125,000 per year |
| System of Record Integration (Launch) <i>Pending System of Record</i> | Included at no additional cost with the Enterprise Platform Subscription. | | | | |
| SQL Database Access <i>Access to Raw Data</i> | \$6,000 (\$12,000 per year) | \$12,000 per year | \$12,000 per year | \$12,000 per year | \$12,000 per year |
| Included Platform Support In addition to ongoing updates, standard support and maintenance and updates of the findhelp Platform. | Included with Platform Subscription | | | | |
| Ongoing Customer Support With collaboration and cooperation from the Customer team. | \$6,000 \$24,000 per year for EnterprisePlus <i>Discounted \$12,000 to \$12,000 in year one.*</i> | \$18,000 per year for EnterprisePlus | \$24,000 per year for EnterprisePlus | \$24,000 per year for EnterprisePlus | \$24,000 per year for EnterprisePlus |
| Community Engagement - Partnerships Launch Package SFHSA’s 65 contracted partners can claim their CBO listing and CBO user account on findhelp and leverage all of the CBO Tools for free. This CE | \$50,000 \$100,000 year one. Year two includes ongoing CE support for \$25,000 per year | \$62,500 | \$25,000 | \$25,000 | \$25,000 |

| | | | | | |
|--|--------------------------|---|---|---|---|
| Partnerships Launch Package can be leveraged for more intensive onboarding of contracted partners by findhelp Community Engagement Staff. | | | | | |
| EnterprisePlus Initial Launch Professional Services With collaboration and cooperation from the Customer team: Implementation and support from a findhelp Customer Success Manager. | Included in DPH pricing. | – | – | – | – |

The table below summarizes the total cost by component by fiscal year:

| Item | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|--|------------------|------------------|------------------|------------------|------------------|
| EnterprisePlus Platform | \$62,500 | \$125,000 | \$125,000 | \$125,000 | \$125,000 |
| SQL Database Access | \$6,000 | \$12,000 | \$12,000 | \$12,000 | \$12,000 |
| Ongoing Customer Support | \$6,000 | \$18,000 | \$24,000 | \$24,000 | \$24,000 |
| Community Engagement - Partnerships Launch Package | \$50,000 | \$62,500 | \$25,000 | \$25,000 | \$25,000 |
| Cost for each year: | \$124,500 | \$217,500 | \$186,000 | \$186,000 | \$186,000 |

- I. Contractor shall submit invoices on a monthly basis into CARBON.
- II. The total amount of this budget for January 1, 2025 – June 30, 2029 is **\$900,000**.
- III. At the City’s sole discretion, contingency amount up to **\$90,000** may be available.

The total amount not to exceed is **\$990,000**.

**Appendix D-1
Calculation of Charges**

**FINDHELP PLATFORM FOR SFDPH
July 1, 2025 to June 30, 2029**

SFDPH shall pay Findhelp in accordance with the following fee schedule:

| Description | Year 1 7/1/25 to 6/30/26 | Year 2 7/1/26 to 6/30/27 | Year 3 7/1/27 to 6/30/28 | Year 4 7/1/28 to 6/30/29 |
|---|---|---|---|---|
| Included Subscription and Platform Fees | | | | |
| EnterprisePlus Platform | Up to \$75,000 per year | Up to \$75,000 per year | Up to \$75,000 per year | Up to \$75,000 per year |
| SQL Data Warehouse | Single SQL instance included with DAS pricing | Single SQL instance included with DAS pricing | Single SQL instance included with DAS pricing | Single SQL instance included with DAS pricing |
| Epic Integration (Launch) | Included at no additional cost with the Enterprise Platform Subscription. | N/A | N/A | N/A |
| Automated Program Recommendations Integration | \$20,000 per year | \$20,000 per year | \$20,000 per year | \$20,000 per year |
| Epic Integration (Native+) | \$10,500 per year | \$10,500 per year | \$10,500 per year | \$10,500 per year |
| Included Platform Support | \$0 Included with Platform Subscription | \$0 Included with Platform Subscription | \$0 Included with Platform Subscription | \$0 Included with Platform Subscription |
| Ongoing Customer Support With collaboration and cooperation from the Customer team: | Single instance support included with DAS pricing | Single instance support included with DAS pricing | Single instance support included with DAS pricing | Single instance support included with DAS pricing |
| Community Engagement - Professional Services Advanced Support | Up to \$66,000 per year | N/A | N/A | N/A |
| One-time Implementation Services | | | | |
| EnterprisePlus Initial Launch Professional Services With collaboration and cooperation from the Customer team: Implementation and support from a findhelp Customer Success Manager. | \$45,000 one-time fee | N/A | N/A | N/A |
| Additional Optional Features & Services | | | | |
| As Needed Services (can be any of the services in Additional Services As Needed) | \$24,000 | \$90,000 | \$90,000 | \$90,000 |

| | | | | |
|---|-----------|-----------|-----------|-----------|
| table below) | | | | |
| TOTALS | | | | |
| Included Subscription and Platform Fees Total | \$216,500 | \$105,500 | \$105,500 | \$105,500 |
| Included and Optional Subscription and Platform Fees Total | \$240,500 | \$195,500 | \$195,500 | \$195,500 |
| TOTAL | | | | \$827,000 |
| 10% Contingency | | | | \$82,700 |
| TOTAL Contract Not to Exceed Amount | | | | \$909,700 |

Additional Services As Needed

Services Rate Sheet Current as of July 2024

The services listed below are for additional optional services and their corresponding rates. These services are supplemental and not required for an initial launch and are available to serve customers for ongoing needs and initiatives during and after go-live. Findhelp can provide estimated fees for any of the below services upon City’s request. Travel and related travel expenses (subject to Customer pre-authorization) apply for any onsite visits and trips outside of onsite training included in Implementation Fee.

| Service | Rate |
|---|---|
| Branded Mobile App for a Community Site (iOS or Android) | \$10,000 per year |
| Live Search Help | \$6,000 per year |
| EnterprisePlus Platform One (1) Customer Branded Staff Site and One (1) Customer Branded Community Site A second, additional instance, specific to DPH. Only a single DAS instance of Enterprise Plus is included above. | \$0 *Requires additional implementation fees *Requires require additional support fees |
| SQL Data Warehouse A second, additional SQL instance, specific to DPH. Only a single DAS instance of SQL is included above. | \$12,000 per year |
| Premium Reports & Insights | \$18,000 per year (includes Data Warehouse Access) |
| Enterprise API Available to use within a Customer System (“System”) | Price to be quoted after discussing and understanding use case |
| Marketplace for Goods & Services Fulfillment | Varies based upon the transaction type and the Marketplace Supplier, subject to separate ordering and terms |

| | |
|--|---|
| Custom Development | \$225 per hour |
| Non-standard Integrations and After Hours Technical Support | \$150 per hour |
| Ongoing Support & Services | Customer Success Manager/Project Management - \$135 per hour Technical Advisor/Project Management - \$150/hour Custom-scoped Community Engagement Support - \$135 per hour Reporting Services - \$150 per hour Executive Advisor - \$250 per hour |
| Community Engagement - Professional Services Advanced Support | \$66,000 per year |
| Upgrade to Community Engagement -Professional Services – Upgrade to Augmented Support | \$54,000 per year <i>*requires first purchasing the Community Engagement Professional Services – Advanced Support Level</i> |
| Professional Services | Priced based on scope of work |
| Travel Expenses | As incurred, subject to the City’s Travel Policy Guidelines |
| Additional Staff Trainings | Virtual Staff Trainings: \$250 per training Onsite Staff Trainings: \$250 per training + Travel and Expenses |

Invoice Schedule (Annual Invoicing): Invoicing should follow the terms and format specified in the agreement. City requires that purchase order first be issued prior to vendor invoicing. Purchase Orders are issued at the beginning of each fiscal year (July 1) and should be sent to ar@findhelp.com. The purchase orders will contain all Included Subscription and Platform Fees, One-time Fees, and any ordered Additional Optional Features & Services for the 12-month period covering the full fiscal year. Findhelp invoices must reference the purchase order ID. Subscription Services (any items with recurring fees) added during a Subscription Term will be invoiced at an amount prorated to the Customer’s next occurring annual invoice date, and all other items will be invoiced as ordered or otherwise mutually agreed in writing. Ongoing customized Services and Travel (if applicable) are billed monthly. All undisputed amounts on invoices are due within thirty (30) days of receipt by Customer.

Billing Information: SFDPH will provide a person who will be the main Customer contact for all billing and payment communication. Changes to this contact must be made by emailing ar@findhelp.com with new contact information.

- Invoices should be sent to EHR.invoices@sfdph.org
- The primary point of contact for invoices is Natasha Lalani, natasha.lalani@sfdph.org



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Date: Tuesday, October 22, 2024

To: Dan Kaplan, Deputy Director, HSA

From: Esperanza Zapien, Director of Contracts, HSA

RE: Sole Source Waiver request – FindHelp to provide the Online Resource Directory (ORD)

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

The Human Services Agency (HSA) and the Department of Disability and Aging Services (DAS) respectfully request the approval of a sole source waiver for Findhelp, for the provision of the proprietary web application, to be utilized by DAS to develop the Online Resource Directory (ORD). FindHelp will customize their web-based social services technology platform to provide the DAS Online Resource Directory (ORD) – the system will be used as a searchable repository of resources.

Per Administrative Code Section 21.30, “Where a vendor has proprietary rights to software or where maintenance of equipment by a particular vendor is required to preserve a warranty, software support and equipment maintenance agreements entered into with that vendor shall be treated as a sole source for the purposes of any contract requirements included in the Municipal Code.”



London Breed
Mayor

Trent Rhorer
Executive Director

The Findhelp web-based social services technology platform is directly and solely owned by and proprietary property of Aunt Bertha, a Public Benefit Corporation (also doing business as “findhelp®” and “findhelp.org”). Aunt Bertha only licenses the Findhelp services via subscription options to other entities to use the Findhelp services.

DAS is proposing the following:

| |
|---|
| Request: DAS will enter into a 4.5 year sole source contract with Findhelp. |
| Brief description of services: The purpose of this contract is to provide an online resource directory (ORD) to help connect San Francisco older adults and adults with disabilities to services, resources, and providers citywide. The ORD will serve as a searchable repository of resources spanning a wide range of service domains, including healthcare, housing, caregiving assistance, public benefits, and social and recreational spaces. |
| Duration: January 1, 2025 through June 30, 2029. |
| Contract Amount: \$1,972,300 |



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

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

Justification for Sole Source: Admin Code 21.30: Proprietary Software Licenses and Support and Proprietary Equipment Maintenance. / Admin Code 21.5(b): No substitute for Product/Service and Only One Source

Compliance: 12B compliant and an approved City Supplier.

Approved Disapproved

DocuSigned by:

Daniel Kaplan

10/22/2024

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Dan Kaplan, Deputy Director of Administration and Finance