



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

Office of Early Care  
and Education

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**MEMORANDUM**

**TO:** HUMAN SERVICES COMMISSION

**THROUGH:** TRENT RHORER, EXECUTIVE DIRECTOR

**FROM:** NOELLE SIMMONS, DEPUTY DIRECTOR  
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

**DATE:** MARCH 25, 2021

**SUBJECT:** NEW CONTRACT: **PUBLIC CONSULTING GROUP(FOR PROFIT)** TO PROVIDE CONSULTANT SERVICES FOR CALWORKS OUTCOMES AND ACCOUNTABILITY REVIEW (CAL-OAR)

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**CONTRACT TERM:** 4/1/2021 – 9/30/2022

| <b>Contract Amount</b> | <u>4/1/21-9/30/22</u> | <u>Contingency</u> | <u>Total Amount</u> |
|------------------------|-----------------------|--------------------|---------------------|
|                        | \$179,399             | \$17,940           | \$197,339           |

| <b>Funding Source</b> | <u>County</u> | <u>State</u> | <u>Federal</u> | <u>Contingency</u> | <u>Total</u> |
|-----------------------|---------------|--------------|----------------|--------------------|--------------|
| <b>FUNDING:</b>       |               | \$179,399    |                | \$17,940           | \$197,339    |
| <b>PERCENTAGE:</b>    |               | 100%         |                |                    | 100%         |



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

The Department of Benefits and Family Support requests authorization to enter into new contract with Public Consultant Group for the period of April 1, 2021 to September 30, 2022 in an amount of \$179,339 plus a 10% contingency for a total amount not to exceed \$197,339. The purpose of the contract is to provide professional services for CalOAR implementation and planning that includes consultation, technical assistance and meeting facilitation to San Francisco County CalWORKs program.

## **Background**

The California Department of Social Services (CDSS) established the California CalWORKs Outcomes and Accountability Review (Cal-OAR) to facilitate a local accountability system that fosters continuous quality improvement in county CalWORKs programs and in the collection and dissemination by the department of best practices in service delivery. The overall goal of the contract is to assist CalWORKs staff in completing the components of the Cal-OAR process, beginning with the County Self-Assessment (CSA), which will guide development of System Improvement Plan (SIP) for 2021-2025, a Continuous Quality Improvement (CQI) process with stakeholder involvement and a cross-county peer review.

## **Services to be provided**

Public Consultant Group (PCG) will work closely with CalWORKs Planning team. The services will be divided into two phases.

### **Phase 1: Consultation on County Self-Assessment**

The purpose of Phase 1 is to establish a shared understanding of the current strengths, needs, issues and system improvement themes from various inquiry processes with stakeholders, review of current data and other inputs to inform preparation of San Francisco's CSA Report.

### **Phase 2: Initial Planning for SIP Development**

The purpose of Phase 2 is to define and coordinate planning for drawing from CSA findings to inform engagement of stakeholders in developing a SIP for 2021-2025.

See Attached Scope of Service for Details.

## **Selection**

Contractor was selected through the Citywide Request for Qualification CON#RFQ2019-10 through, which was competitively bid in October 2019.

## **Funding**

Funding for this contract is provided by State Funds

## **ATTACHMENTS**

Public Consultant Group Appendix A – Services to be Provided

Public Consultant Group Appendix B – Budget

**Appendix A – Services to be Provided**  
**Public Consulting Group**  
**CalOAR Implementation Planning Support**  
**April 1, 2021-September 30, 2022**

**I. Purpose of Contract**

The purpose of the contract is to provide professional services for CalOAR implementation and planning that includes consultation, technical assistance and meeting facilitation to San Francisco County CalWORKs program. The overall goal of the engagement is to assist CalWORKs staff in completing the components of the CalOAR process, beginning with the County Self-Assessment (CSA), which will guide development of System Improvement Plan (SIP) for 2021-2025, a Continuous Quality Improvement (CQI) process with stakeholder involvement and a cross-county peer review. The approach involves collaboration with the California Department of Social Services.

**II. Definitions**

|            |   |
|------------|---|
| Contractor | Public Consulting Group   |
| CalOAR     | CalWORKs Outcomes and Accountability Review   |
| CalWORKs   | California Work Opportunity and Responsibility to Kids, welfare-to-work program for families receiving Temporary Aid to Needy Families (TANF) cash aid. |
| CDSS       | California Department of Social Services  |
| CQI        | Continuous Quality Improvement  |
| CSA        | County Self-Assessment  |
| HSA        | Human Services Agency of the City and County of San Francisco   |
| SIP        | System Improvement Plan   |

**III. Target Population**

The target population for this contract is CalWORKs staff in the Human Services Agency.

**IV. Description of Services**

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

All facilitation and analysis services will be conducted in collaboration with San Francisco's CalWORKs Planning Team.

**Part 1: Consultation on County Self-Assessment**

Purpose: To establish a shared understanding of the current strengths, needs, issues and system improvement themes from various inquiry processes with stakeholders, review of current data and other inputs to inform preparation of San Francisco's CSA Report.

| Project Activities  | Timeframe      |
|---|----------------|
| 1. Research and Analysis <ul style="list-style-type: none"> <li>a. Review background materials, including recent organizational assessments and analytics.</li> <li>b. Collaborate with County staff to integrate findings from qualitative analysis of Case Review data into Peer Review process.</li> </ul>   | Month 1        |
| 2. Project Management Support <ul style="list-style-type: none"> <li>a. Advise CalWORKs Planning Team Lead on project management</li> <li>b. Support work plan development, logistics, scheduling and other coordination with planning team members.</li> </ul>   | Ongoing        |
| 3. Focus Groups / Stakeholder Meetings Support <ul style="list-style-type: none"> <li>a. Design &amp; prepare for Focus Groups / Stakeholder Meetings.</li> <li>b. Support coordination of logistics for Focus Groups / Stakeholder Meetings.</li> <li>c. Facilitate (with others) Focus Groups / Stakeholder Meetings.</li> <li>d. Analyze, consolidate and document findings from Focus Groups / Stakeholder Meetings.</li> </ul> | Months 1 and 2 |
| 4. Update the CalWORKs state plan to reflect SF county's current programmatic design that aligns with CSA and the last SIP developed  | Month 3        |
| 5. Cross-county Peer Review Support <ul style="list-style-type: none"> <li>a. Design and prepare for Peer Review process as directed by CDSS</li> <li>b. Coordinate logistics for Peer Review activities in San Francisco.</li> <li>c. Facilitate Integrated Peer Review event(s).</li> <li>d. Analyze, consolidate and document Integrated Peer Review findings.</li> </ul>  | Months 3 and 4 |
| 6. CSA Report Preparation Support <ul style="list-style-type: none"> <li>a. Prepare summary of CSA findings to inform CSA report.</li> <li>b. Contribute content &amp;/or review CSA Report sections as needed.</li> </ul>  | Month 4        |

**Part 2: Initial Planning for SIP Development**

Purpose: To define and coordinate planning for drawing from CSA findings to inform engagement of stakeholders in developing a SIP for 2021-2025.

| <b>Project Activities</b>   | <b>Timeframe</b> |
|---|------------------|
| 1. Engage CalWORKs Planning Team in series of planning sessions to agree on the following decisions: <ul style="list-style-type: none"> <li>• Confirm overall timeframe of SIP planning process</li> <li>• Refine Planning Team composition to support SIP phase</li> <li>• Prepare preliminary work plan for SIP development effort</li> </ul> | Dates TBD        |
| 2. Prepare for and coordinate initial SIP activities: <ul style="list-style-type: none"> <li>• Identify focal areas of SIP based on CSA findings</li> <li>• Design stakeholder outreach / engagement process</li> <li>• Begin planning initial SIP activities</li> </ul>  | Dates TBD        |

**V. Location and Time of Services**

Initial meetings will be held virtually via MS Teams or Zoom.

**VI. Deliverables**

The following table outlines the scope of work for this engagement and deliverables to be provided.

| <b>Services</b>                                       | <b>Deliverables</b>   |
|---|---|
| <b>Part 1: Consultation on County Self-Assessment</b> |   |
| Project Planning & Coordination                       | - Project Schedule<br>- Bi-weekly Status Updates  |
| Meeting Design, Preparation & Follow-up               | - Meeting Agendas, Notes & Handouts   |
| Meeting Facilitation (5 days)                         | - 6 hrs/day x 5 virtual visits<br>- 5 virtual meetings  |
| Stakeholder Engagement & Analysis                     | - Outreach & Engagement Plan  |
| Deliverable Writing, Editing & Production             | - Peer Review Findings<br>- Focus Group Findings<br>- Final CSA report and a summary of CSA Findings<br>- All products and templates developed and used as part of SF's CalOAR planning and implementation, including those used in meetings.<br>-SF County CalWORKs state plan recommendations |
| <b>Part 2: Initial Planning for SIP Development</b>   |   |

| Services                                  | Deliverables  |
|---|---|
| Project Planning & Coordination           | <ul style="list-style-type: none"> <li>- Project Schedule</li> <li>- Bi-weekly Status Updates</li> </ul>  |
| Meeting Design, Preparation & Follow-up   | <ul style="list-style-type: none"> <li>- Meeting Agendas, Notes &amp; Handouts</li> </ul>   |
| Meeting Facilitation (5 days)             | <ul style="list-style-type: none"> <li>- 6 hrs/day x 5 on-site or virtual visits</li> <li>- 5 virtual meetings</li> </ul>   |
| Stakeholder Engagement & Analysis         | <ul style="list-style-type: none"> <li>- Outreach &amp; Engagement Plan</li> </ul>  |
| Deliverable Writing, Editing & Production | <ul style="list-style-type: none"> <li>- Peer Review Findings</li> <li>- Focus Group Findings</li> <li>- Final Systems Improvement Plan</li> <li>- All products and templates developed and used as part of SF's CalOAR planning and implementation, including those used in meetings.</li> </ul> |

## VII. Reporting Requirements

- A. Contractor will provide a monthly report of activities, referencing the tasks as described in Section VI - Deliverables. Contractor will enter the monthly metrics in the CARBON database by the 15th of the following month.
  
- B. Contractor will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VI - Deliverables. This report will also include accomplishments and challenges encountered by the Contractor. Grantee 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 required by the Department.
  
- D. Monthly and Annual Reports will be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system.

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

Leslie.lau1@sfgov.org  
Contract Manager, Office of Contract Management

or

Terri.austin@sfgov.org  
WtW Services Strategic Manager, CalWORKs Program

**Appendix B – Calculation of Charges**  
**Public Consultant Group**  
**4/1/2021-9/30/2022**

| <b>Part 1: Consultation on County Self-Assessment</b> |   |             |                |            |                  |                          |                  |
|---|---|-------------|----------------|------------|------------------|--------------------------|------------------|
| Services  | Deliverables  | Assoc. Mgr. | Sr. Consultant | Consultant | Business Analyst | Cost by Service Provided | Part 1 cost      |
|   |   | \$319       | \$297          | \$248      | \$165            |                          |                  |
| Project Planning & Coordination                       | - Project Schedule  | 2           | 2              | 2          | 3                | <b>\$7,781</b>           | <b>\$76,955</b>  |
|   | - Bi-weekly Status Updates  | 2           | 6              | 6          | 10               |                          |                  |
| Meeting Design, Preparation & Follow-up               | - Meeting Agendas, Notes & Handouts   | 0           | 10             | 12         | 10               | <b>\$7,596</b>           |                  |
| Meeting Facilitation (5 days)                         | - 6 hrs/day x 5 virtual visits  | 14          | 32             | 31         | 32               | <b>\$26,938</b>          |                  |
|   | - 5 virtual meetings  |             |                |            |                  |                          |                  |
| Stakeholder Engagement & Analysis                     | - Outreach & Engagement Plan  | 2           | 7              | 29         | 33               | <b>\$15,354</b>          |                  |
| Deliverable Writing, Editing & Production             | - Peer Review Findings  |             | 3              | 6          | 10               | <b>\$19,286</b>          |                  |
|   | - Focus Group Findings  |             | 3              | 6          | 10               |                          |                  |
|   | - Final CSA report and a summary of CSA Findings  |             | 3              | 6          | 10               |                          |                  |
|   | - All products and templates developed and used as part of SF's CalOAR planning and implementation, including those used in meetings. |             | 3              | 6          | 10               |                          |                  |
|   | -SF County CalWORKs state plan recommendations  |             | 4              | 4          | 6                |                          |                  |
| <b>Part 2: Initial Planning for SIP Development</b>   |   |             |                |            |                  |                          |                  |
| Services  | Deliverables  | Assoc. Mgr. | Sr. Consultant | Consultant | Business Analyst | Cost by Service Provided | Part 2 cost      |
|   |   | \$319       | \$297          | \$248      | \$165            |                          |                  |
| Project Planning & Coordination                       | - Project Schedule  |             | 2              | 4          | 8                | <b>\$15,409</b>          | <b>\$102,444</b> |
|   | - Bi-weekly Status Updates  | 7           | 14             | 14         | 16               |                          |                  |
| Meeting Design, Preparation & Follow-up               | - Meeting Agendas, Notes & Handouts   | 8           | 16             | 16         | 25               | <b>\$15,397</b>          |                  |
| Meeting Facilitation (5 days)                         | - 6 hrs/day x 5 on-site or virtual visits   |             | 10             | 60         | 60               | <b>\$27,750</b>          |                  |
|   | - 5 virtual meetings  |             |                |            |                  |                          |                  |
| Stakeholder Engagement & Analysis                     | - Outreach & Engagement Plan  | 6           | 24             | 26         | 26               | <b>\$19,780</b>          |                  |
| Deliverable Writing, Editing & Production             | - Peer Review Findings  | 2           | 6              | 12         | 14               | <b>\$24,108</b>          |                  |
|   | - Focus Group Findings  | 2           | 6              | 12         | 14               |                          |                  |
|   | - Final Systems Improvement Plan  | 2           | 6              | 12         | 14               |                          |                  |
|   | - All products and templates developed and used as part of SF's CalOAR planning and implementation, including those used in meetings. |             |                |            | 6                |                          |                  |

- I.** HSA will reimburse the contractor for services provided based on the above schedule of rates on completion of each phase.
- II.** Contractor shall submit invoices on a monthly basis in CARBON (Contract Administration, Reporting, and Billing Online) for actual services provided. Invoices shall clearly state the Phase completion.
- III.** Contractor shall submit Monthly Status Reports with their invoices. Verification and approval of the work detailed in the Monthly Status Reports and the invoices by Launchpad Project Manager and Contract Manager is required for payment.
- IV.** The total amount of this budget is **\$179,399**. Contingent amount up to \$17,940 may be available, in the City's sole discretion.
- V.** The total amount of the contract shall not to exceed **\$197,339**.