



**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

MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

FROM: DANIEL KAPLAN, DEPUTY DIRECTOR FOR
ADMINISTRATION & FINANCE
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DATE: MAY 21, 2021

SUBJECT: NEW GRANT: **211 SAN DIEGO (NON-PROFIT)** TO
PROVIDE CALFRESH & MEDI-CAL TELEPHONE
ASSISTANCE

DS
JG

GRANT TERM: 7/1/2021 – 6/30/2024

GRANT AMOUNT:

<u>New</u>	<u>Contingency</u>	<u>Total</u>
\$971,824	\$97,182	\$1,069,006

ANNUAL AMOUNT:

<u>FY21-22</u>	<u>FY22-23</u>	<u>FY23-24</u>
\$314,909	\$323,611	\$333,305

<u>Funding Source</u>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$971,824			\$97,182	\$1,069,006
PERCENTAGE:	100%				



London Breed
Mayor

Trent Rhorer
Executive Director

The Department of Benefits and Family Support (BFS) requests authorization to enter into a new grant with 211 San Diego for the period of July 1, 2021 through June 30, 2024, in an amount of \$971,824 plus a 10% contingency for a total amount not to exceed \$1,069,006. The purpose of the grant is to reduce hunger and improve health in San Francisco by generating new approvable applications for CalFresh and Medi-Cal benefits.

Background

One out of four San Francisco residents faces food insecurity, meaning they struggle with poor nutrition or insufficient caloric intake. These problems of inadequate nutrition then lead to poor health outcomes. Currently, only two-thirds of those likely eligible for CalFresh are receiving benefits.

Services to be Provided

Grantee will communicate over the phone with residents of San Francisco County who are potentially eligible for CalFresh and/or Medi-Cal and assist them in submitting applications to SFHSA. Over the course of the contract term SFHSA will provide Grantee with a list of approximately 39,000 households who are potentially eligible for CalFresh or Medi-Cal benefits. Grantee will contact individuals in batches of 900 or other agreed upon installments. The benefits linkage process will involve phone contact, application assistance, and reminders to encourage households to complete the application process with SFHSA. Grantee will deliver all benefits linkage material, communication and correspondence in languages comprising but not limited to: Cantonese (Chinese), Spanish, and English. Grantee will also communicate over the phone, mail, or text with clients who may be at-risk of discontinuance or have already been discontinued from CalFresh and/or Medi-Cal benefits to assist them in maintaining/reestablishing aid with SFHSA. In partnership with SFHSA, Grantee will employ a data-driven approach to increase CalFresh and/or Medi-Cal enrollment and reduce churn, and will continually refine the business processes, strategy, and implementation. Grantee will build strong relationships and regularly meet with local Community-Based Organizations to identify referral opportunities. Grantee will track and report benefits linkages data on a monthly basis to HSA, and will record and store all calls.

Location and Time of Services

Benefits linkages services will take place at 211 San Diego's headquarters in San Diego, CA, which houses more than 110 staff and operates a virtual over-the-phone environment with technical capacity to expand the number of clients served at any given time. The office is open from 7:00 AM to 8:00 PM daily, with 24/7 access to general 211 phone agents for information and referral assistance.

Selection

Contractor was selected through Request for Proposals #878 – CalFresh Telephonic Outreach, which was competitively bid in February 2021.

Funding

Funding for this contract is provided entirely by City and County General Funds.

ATTACHMENTS

Appendix A – Services to be Provided

Appendix B – Budget

Appendix A: Scope of Services to be Provided
211 San Diego
CalFresh & Medi-Cal Telephonic Application Assistance
July 1, 2021 – June 30, 2024

I. Purpose of Grant

Perform phone outreach to likely eligible CalFresh and Medi-Cal residents of San Francisco County and assist in generating CalFresh and Medi-Cal applications for them.

II. Target Population

The target populations include persons who may be eligible for CalFresh and/or Medi-Cal, but who are not currently enrolled.

III. Description of Services

Grantee shall provide the following services during the term of this grant:

For all client correspondence, Grantee will:

- a. Work with SFHSA to identify the most efficient and effective strategies for client engagement.
- b. Work together with SFHSA to develop text and graphics for mail correspondence. SFHSA will provide collateral material (postcards, letterhead, etc.) for mailings.
- c. SFHSA will be responsible for mailing initial client correspondence, with the intent of motivating the client to initiate the phone call, when applicable. The initial postcard and letter will alert the client that Grantee will be following up with a phone call within the next 10 days if the client does not call the toll-free number. Correspondence will also include a unique URL (2enrollmesf.org) where clients can self-schedule appointments with Grantee.
- d. Make initial contact with clients in batches of 1,000-1,200 per month.

1. Procedure for initial calls to clients:

- a. Upon receipt of a list of approximately 1,000 potential clients from SFHSA each month, perform outbound calls to provide CalFresh and/or Medi-Cal application and providing education to clients with the goal of submitting an over-the-phone applications and other actions required for application approval.

2. Procedure for interviewing potential clients:

- a. Application assistors will contact the client at the agreed upon scheduled appointment time to assist households in completing the application through the publicly available portal, MyBenefitsCalWIN. Utilizing a Community-Based Organization (CBO) User ID and Password, project staff will complete the application, while utilizing Grantee's inContact phone system to automatically record calls for monitoring and legal purposes.
- b. Grantee will record a telephonic signature on behalf of the client. Project staff will record the telephonic signature and save the voice file to the Grantee's file storage system, submitting to SFHSA upon request. Grantee will retain the telephonic signatures for a period of 3 years, as per SFHSA and state regulation (ACIN I-60-13).
- c. Project staff will attempt to reach clients, who are "no shows" to their scheduled appointment, to re-schedule once per day for the two days following the original appointment date. If deemed non-responsive after these attempts, no further attempts will be made.

3. Assisting clients with finding necessary documentation:

- a. Clients who submit applications will be provided with a checklist of documents generally required to be submitted in order for the SFHSA to determine final eligibility. The checklist can be emailed or mailed to the client, based on their preference. Grantee may use information collected from Read-Only access to CalWIN Lite case comments to determine which documents are missing and to provide assistance with submitting document if needed. Grantee may submit a release of information request as a part of the application submission on behalf of all clients with a client's approval stated in their telephonic signature, allowing grantee to communicate directly with SFHSA regarding the status of client's application. Grantee may also leverage existing relationship with SFHSA liaisons for assistance with clients who are facing barriers.

4. Procedures for following up with clients:

Non-responsive potential clients:

- Approximately one week after the initial call, grantee will follow up with a second call to each non-responsive client with working phone numbers with a brief message about the project and the option for information and to schedule an appointment.
- Clients who are non-responsive to the second follow up call will receive a final mailing, text message, or email based on client preference, approximately 2 weeks after the previous attempt. This

communication will be similar to the previous mailings, but explain that it is a final attempt to contact them.

Responsive potential clients:

- Approximately 10 days after application submission, project staff will call the client to follow up on the process and encourage the client to complete the required steps with SFHSA. The follow-up call will verify that the client has been contacted by the County to schedule an interview (if required) and that all documents are submitted. If any steps have not been completed, project staff will provide education and assistance to ensure that client completes the process.
- Two weeks after application submission, project staff will follow up a second time with clients who had not submitted all documentation at the point of the first follow-up call, and ensure that they are following the SFHSA's process for interview requirements and submission of documents.

5. *Evaluation:*

- Application assistors will check the outcomes of all submissions. If a submission is denied, Grantee will identify the reason and attempt to rectify it by following up with the clients whenever possible.
- Data collected from Grantee's telephony system and Customer Relationship Management system will reflect: Number of calls made, Calls answered, Messages left, Applications started, Applications submitted, Applications submitted with all required documents, and Applications submitted without documents. Ongoing evaluation will also occur during regular phone/virtual meetings with SFHSA to share best practices, lessons learned, and to refine strategies. These meetings will support a model of continuous improvement and a team approach.

6. *Emergency Procedures:*

- By Federal Communications Commission designation, 211 San Diego is required to actively respond to local disasters. Actively responding to a disaster shall be as designated by the local County Health and Human Services Agency or other State or local government entity. Contractual obligations shall exclude days on which Grantee actively responded to such disaster or local emergencies. Grantee shall notify SFHSA staff within 24 hours of beginning to respond to a disaster, and shall notify SFHSA staff within 24 hours of the end of such response.

IV. Location and Time of Services

Telephone benefits linkages services will take place at 211 San Diego's

headquarters in San Diego, CA, which operates a virtual over-the-phone environment with technical capacity to expand the number of clients served at any given time. The office is open from 7:00 AM to 8:00 PM daily, with 24/7 access to general 211 phone agents for information and referral assistance.

V. Service & Outcome Objectives

Service Objectives:

- A. Perform phone outreach to likely eligible CalFresh and Medi-Cal residents of San Francisco County and assist in generation CalFresh and Medi-Cal applications for them.
- B. Grantee will communicate over the phone, mail, or text with clients who may be at-risk of discontinuance or have already been discontinued from CalFresh/Medi-Cal benefits to assist them in maintaining/reapplying for aid.
- C. Deliver all outreach materials, communications, and correspondence in at least three languages: Cantonese (Chinese), Spanish, and English.
- D. In partnership with SF-HSA, engage in a data-driven approach to increase CalFresh/Medi-Cal Enrollment.
- E. Build strong relationships with local community-based organizations to identify referral opportunities.
- F. Track and report outreach data on a monthly basis to SF-HSA.

Outcome Objectives:

- A. Grantee will generate a minimum of 1,440 CalFresh applications per contract term with 893 approved applications (62% approval rate).
- B. Grantee will make initial contact with clients in batches of 900-1,000 per month.
- C. Of all discontinuance/churn prevention cases, 25% connected and had one of the following “positive” dispositions: provided assistance, remained on benefits, case restored, re-applied with 2-1-1.
- D. Grantee will report on lessons learned about strengths and challenges of the service model on a quarterly basis.

VI. Reporting Requirements

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
- B. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. 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, contact:

Elizabeth.Leone@sfgov.org
Senior Contracts Manager, Office of Contract Management
1650 Mission Street, Suite 300
San Francisco, CA 94103

or

Ana.Marie.Lara@sfgov.org
Program Analyst, CalFresh/ Medi-Cal
1440 Harrison Street
San Francisco, CA 94103

VII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives.
- 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	Appendix B, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name			Term	
6	211 San Diego			7/1/2021 - 6/30/2024	
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: CalFresh & Medi-Cal Telephonic Application Assistance				
10	Budget Reference Page No.(s)				
11	Program Term:	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	Total
12	Expenditures				
13	Salaries & Benefits	\$246,609	\$254,176	\$262,605	\$763,390
14	Operating Expense	\$27,225	\$27,225	\$27,225	\$81,674
15	Subtotal	\$273,834	\$281,401	\$289,830	\$845,064
16	Indirect Percentage (%)	15%	15%	15%	\$0
17	Indirect Cost (Line 16 X Line 15)	\$41,075	\$42,210	\$43,475	\$126,760
18	Capital Expenditure	\$0	\$0	\$0	\$0
19	Total Expenditures	\$314,909	\$323,611	\$333,305	\$971,824
20	HSA Revenues				
21	General Fund	\$314,909	\$323,611	\$333,305	\$971,825
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$314,909	\$323,611	\$333,305	\$971,825
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$0			\$0
37	Full Time Equivalent (FTE)				
39	Prepared by: Paul Redfern, CFO		Telephone No.:		Date
40	HSA-CO Review Signature: _____				
41	HSA #1				10/25/2016

	A	B	C	D	E	F	G	H	I
1	Appendix B, Page 2								
2									
3									
4	Program Name: CalFresh & Medi-Cal Telephonic Application Assistance								
5	(Same as Line 9 on HSA #1)								
6									
7	Salaries & Benefits Detail								
8									
9									
10									
11		Agency Totals		HSA Program		7/1/21	7/1/22	7/1/23	
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DHS Program Budgeted Salary	DHS Program Budgeted Salary	DHS Program Budgeted Salary	TOTAL 7/1/21 to 6/30/24
12	POSITION TITLE								
13	<i>Enrollment Center Specialists</i>	\$39,250	4.00	100%	4.00	\$157,000	\$161,710	\$166,561	\$485,271
14	<i>Program Supervisor</i>	\$58,195	1.00	19%	0.19	\$11,057	\$10,789	\$11,730	\$33,576
15	<i>Program Manager</i>	\$70,500	1.00	5%	0.05	\$3,525	\$3,630	\$3,739	\$10,894
16	<i>Director of Enrollment Services</i>	\$113,300	1.00	5%	0.05	\$5,665	\$5,834	\$6,010	\$17,509
17	<i>Chief Program Officer</i>	\$185,000	1.00	2%	0.02	\$3,700	\$3,811	\$3,925	\$11,436
18	<i>Program Assistants (multiple)</i>	\$41,600	1.00	4%	0.04	\$1,706	\$1,713	\$1,765	\$5,184
19	<i>Data & Technology (multiple)</i>	\$75,000	1.00	7%	0.06	\$4,500	\$5,407	\$5,569	\$15,476
20	<i>Client Experience (multiple)</i>	\$85,000	1.00	3%	0.03	\$2,547	\$2,626	\$2,705	\$7,878
21									
22					-				
23					-				
24					-				
25					-				
26					-				
27					-				
28					-				
29					-				
30					-				
31	TOTALS		11.00	145%	4.44	\$189,699	\$195,520	\$202,004	\$587,223
32									
33	FRINGE BENEFIT RATE	30%							
34	EMPLOYEE FRINGE BENEFITS					\$56,910	\$58,656	\$60,601	\$176,167
35									
36									
37	TOTAL SALARIES & BENEFITS					\$246,609	\$254,176	\$262,605	\$763,390
38	HSA #2								10/25/2016

	A	B	C	D	E	F	G	H	I	J	K
1	Appendix B, Page 3										
2											
3											
4	Program Name: CalFresh &										
5	(Same as Line 9 on HSA #1)										
6											
7	Operating Expense Detail										
8											
9											
10											
11											
12	<u>Expenditure Category</u>		TERM		<u>7/1/21</u>		<u>7/1/22</u>		<u>7/1/23</u>		<u>TOTAL</u>
13	Rental of Property				\$8,251		\$8,251		\$8,251		\$24,753
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$5,500		\$5,500		\$5,500		\$16,500
15	Office Supplies, Postage				\$3,000		\$3,000		\$3,000		\$9,000
16	Building Maintenance Supplies and Repair										
17	Printing and Reproduction										
18	Insurance				\$1,334		\$1,334		\$1,334		\$4,002
19	Staff Training				\$1,000		\$1,000		\$1,000		\$3,000
20	Staff Travel-(Local & Out of Town)				\$5,000		\$5,000		\$5,000		\$15,000
21	Rental of Equipment										
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE										
23											
24											
25											
26											
27											
28	OTHER										
29	Salesforce Licenses				\$3,140		\$3,140		\$3,140		\$9,420
30											
31											
32											
33											
34											
35	TOTAL OPERATING EXPENSE				\$27,225		\$27,225		\$27,225		\$81,674
36											
37	HSA #3										10/25/2016

	A	B	C	D	E	F
1	Appendix B, Page 4					
2						
3						
4	Program Name: CalFresh & Medi-Cal Telephonic Application Assistance					
5	(Same as Line 9 on HSA #1)					
6						
7	Program Expenditure Detail					
8						
9						
10	EQUIPMENT		TERM	7/1/21	7/1/22	7/1/23
11	No.	ITEM/DESCRIPTION				TOTAL
12						0
13						0
14						0
15						0
16						0
17						0
18						0
19						0
20	TOTAL EQUIPMENT COST			0	0	0
21						
22	R E M O D E L I N G					
23	Description:					0
24						0
25						0
26						0
27						0
28						0
29	TOTAL REMODELING COST			0	0	0
30						
31	TOTAL CAPITAL EXPENDITURE			0	0	0
32	(Equipment and Remodeling Cost)					
33	HSA #4					10/25/2016

Enrollment	2021 Salary	COLA	Increase	2022 Increase	2023
	39250	0.03	1177.5	40427.5 1212.825	41640.325
				\$ 161,710.00	\$ 166,561.30
PA	2021 Salary	COLA	Increase	2022 Increase	2023
	41600	0.03	1248	42848 1285.44	44133.44
				\$ 1,713.92	\$ 1,765.34
PM	2021 Salary	COLA	Increase	2022 Increase	2023
	70500	0.03	2115	72615 2178.45	74793.45
				\$ 3,630.75	\$ 3,739.67
Director of	2021 Salary	COLA	Increase	2022 Increase	2023
	113300	0.03	3399	116699 3500.97	120199.97
				\$ 5,834.95	\$ 6,010.00
Data	2021 Salary	COLA	Increase	2022 Increase	2023
	75000	0.03	2250	77250 2317.5	79567.5
				\$ 5,407.50	\$ 5,569.73
CPO	2021 Salary	COLA	Increase	2022 Increase	2023
	185000	0.03	5550	190550 5716.5	196266.5
				\$ 3,811.00	\$ 3,925.33
Dir. of CE	2021 Salary	COLA	Increase	2022 Increase	2023
	85000	0.03	2550	87550 2626.5	90176.5
				\$ 2,626.50	\$ 2,705.30
Supes	2021 Salary	COLA	Increase	2022 Increase	2023
	58195	0.03	1745.85	59940.85 1798.226	61739.0755
				\$ 11,388.76	\$ 11,730.42