



MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

FROM: NOELLE SIMMONS, DEPUTY DIRECTOR
 JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

DATE: JANUARY 17, 2020

SUBJECT: GRANT MODIFICATION: **211 SAN DIEGO (NON-PROFIT) FOR CALFRESH BENEFITS LINKAGES 17-20**

	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
GRANT TERM:	3/1/17- 2/29/20	3/1/19 – 6/30/20	3/1/17- 6/30/20		
TOTAL GRANT AMOUNT:	\$801,441	\$109,470	\$910,911	\$91,091	\$1,002,002
ANNUAL AMOUNT:	FY 17/18 \$244,561	FY 18/19 \$250,675	FY19/20 \$415,675		
Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$255,055	\$191,291	\$464,565	\$91,091	\$1,002,002
PERCENTAGE:	28%	21%	51%		100%

The Department of Human Services (DHS) requests authorization to modify the existing grant with 211 San Diego for the provision of CalFresh Benefits Linkages services for the extended period of 3/1/2019 to 6/30/2020 for an additional \$109,470 for a new grant amount of \$910,911 plus a 10% contingency for a new grant amount not to exceed \$1,002,002. The purpose of the grant is to reduce hunger and improve health in San Francisco by generating new approvable applications. This modification extends the program to the end of the fiscal year.

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.

211 San Diego's work is renowned for being cutting-edge and highly effective, often cited as a "best practice" for CalFresh client engagement.

Services to be Provided

Grantee will communicate over the phone with potentially eligible CalFresh residents of San Francisco County, and assist in generating CalFresh applications for them. HSA provides Grantee with a list of approximately 20,000 individuals who are potentially eligible for CalFresh benefits. Grantee will contact individuals in batches of 900 or other agreed upon installments. The benefits linkages process will involve outbound contact, application assistance, and reminders to encourage individuals to complete the application process with HSA. Grantee will deliver all benefits linkages materials, communication and correspondence in languages comprising but not limited to: Cantonese (Chinese), Spanish, and English. 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 benefits to assist them in maintaining/reestablishing aid. In partnership with HSA, Grantee will employ a data-driven approach to increase CalFresh enrollment, 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.

This modification will extend the contract by four (4) additional months, from March 1, 2020 through June 30, 2020. The reason for the extension is to allow the CalFresh Expansion application assistance phone campaign to In-Home Supportive Services (IHSS) clients run the course of one year to reach as many clients as possible, while capturing enough data to determine whether there is a need to continue the initiative.

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.

Grantee Performance

The most recent program monitoring was conducted December 13, 2019 and grantee has largely met or exceeded their service and outcome objectives. This past contract term, San Francisco BenefitsNet has piloted new campaigns, such as the SAR7/RRR outreach, which focuses on benefits maintenance. The vendor has proven to be a flexible and nimble partner, able to shift to new campaigns with relatively short notice. Throughout this process San Francisco BenefitsNet and its grantee have experimented with different strategies and continue to learn what strategies are more effective than others to reach and support its community.

Grantee Selection

Grantee was selected through Request for Proposals (RFP) #628 on December 8, 2014. After the extension period, San Francisco BenefitsNet will explore re-procurement of this service.

Funding

Funding for this grant agreement will be provided by County funds, CalFresh Eligibility Funds from the State and Federal Government, and San Francisco's SSI Cash-Out Reversal Allocation from the state.

Attachments

Appendix A-2, Scope of Services

Appendix B-2, Program Budget

**Appendix A-2: Scope of Services to be
Provided 211 San Diego
CalFresh Telephone Benefits Linkages**
Effective March 1, 2017 through June 30, 2020

I. Purpose of Grant

The purpose of the grant is to reduce hunger and improve health in San Francisco by generating approvable CalFresh applications. Currently, only two-thirds of those likely eligible for CalFresh are receiving benefits.

This grant is designed to increase the number of CalFresh approvable applications presented to HSA staff for eligibility determination, and by doing so increase enrollment in the CalFresh and Medi-Cal programs.

II. Definitions

CalFresh	CalFresh Division of the San Francisco Human Services Agency
CBO	Community-Based Organization
Grantee	211 San Diego
Medi-Cal	Medi-Cal Division of the San Francisco Human Services Agency
MyBenefitsCalWIN	California online portal for applying for CalFresh, Medi-Cal, and CalWORKS benefits
SFHSA	San Francisco Human Services Agency
SNAP	Supplemental Nutrition Assistance Program

III. Target Population

The target populations include persons who may be eligible for CalFresh, but who are not currently enrolled, and existing CalFresh clients at risk of losing benefits.

IV. 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.
- d. Make initial contact with clients in batches of 900-1,000 per month.

1. Procedure for initial calls to clients:

- e. Upon receipt of a list of approximately 1,000 potential clients from SFHSA each month, perform outbound calls to provide CalFresh application or benefits maintenance assistance, informing the client that they are potentially eligible or at risk of discontinuance, and providing education to clients with the goal of completing an over-the-phone CalFresh application or other actions required for benefits maintenance.

2. Procedure for interviewing potential clients:

- a. Application assistors will contact the client at the agreed upon scheduled appointment time to complete 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 their application confirmation number and a checklist of documents required to be submitted in order for the county to determine final eligibility. The confirmation number and checklist can be emailed or mailed to the client, based on their preference. Grantee may submit an Authorized

Representative request as a part of the application submission on behalf of all clients with their approval stated in their telephonic signature, allowing them to communicate directly with SFHSA to figure out what documents are missing and to follow up with the clients as needed to ensure submission. Grantee's responsibility as an Authorized Representative is limited to application and SAR7 submission.

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 approximately 2 weeks after the previous attempt. This letter 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 back to follow up on the process and encourage the client to continue the process. If all documentation is submitted to Grantee directly via fax or email, the follow-up call will verify that the client has been contacted by the County to schedule an interview. If documents are missing and the County has not yet scheduled/started the interview with the client, the Grantee will remind the client to submit missing documents. Otherwise, the follow-up call will verify with the client that they have submitted all documentation directly to the County.
- 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 County's process for interview requirements.

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, Inbound call wait time, Applications started, Applications submitted, Applications submitted with all required documents, and

Applications submitted without documents. Ongoing evaluation will also occur during regular phone 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.

V. Location and Time of Services

Telephone benefits linkages services will take place at 211 San Diego's headquarters in San Diego, CA, which houses more than 130 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.

VI. Service & Outcome Objectives

Service Objectives:

- Service Objective 1: Grantee will communicate over the phone with potentially eligible CalFresh residents of San Francisco County, and assist in generating CalFresh applications for them. This service comprises outbound contact, application assistance, and reminders to encourage individuals to complete the application process with HSA.
- Service Objective 2: 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.
- Service Objective 3: Grantee will deliver all benefits linkages materials, communication and correspondence in at least three languages. Required languages are: Cantonese (Chinese), Spanish, and English. A third-party translator may not be used for these required languages.
- Service Objective 4: In partnership with SFHSA, Grantee will engage in a data- driven approach to increase CalFresh enrollment. Grantee will continually refine the business processes, strategy, and implementation with

SFHSA as needed.

- Service Objective 5: Grantee will build strong relationships with local CBOs to identify referral opportunities.
- Service Objective 6: Grantee will track and report benefits data on a monthly basis to SFHSA. Grantee will record all calls and store them in a way that is easily retrievable.

Outcome Objectives:

- Outcome Objective 1: Grantee will generate a minimum of 1,800 approved CalFresh applications per contract term.
- Outcome Objective 2: Grantee will make initial contact with clients in batches of 900-1,000 per month.
- Outcome Objective 3: 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.
- Outcome Objective 4: Grantee will report on lessons learned about strengths and challenges of the service model on a quarterly basis.

VII. 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

VIII. 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	F	G
1							Appendix B-2, Page 1
2							Document Date:
3	HUMAN SERVICES AGENCY BUDGET SUMMARY						
4	BY PROGRAM						
5	Name				Term		
6	2-1-1 San Diego				3/1/2017 - 6/30/2020		
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>						
8	Date of Modification: January 2020						
9	Program: CalFresh Outreach 17-20						
10	Budget Reference	Original	Original	Original	Modification	Revised	
11	Program Term	3/1/17 - 2/28/18	3/1/18 - 2/28/19	3/1/19 - 2/29/20	+ 6/30/2020	3/1/17 - 6/30/20	Total
12	Expenditures						
13	Salaries & Benefits	\$200,766	\$207,760	\$221,615	\$79,292	\$300,907	\$709,433
14	Operating Expense	\$39,000	\$38,000	\$44,650	\$15,899	\$60,549	\$137,549
15	Subtotal	\$239,766	\$245,760	\$266,265	\$95,191	\$361,456	\$846,982
16	Indirect Percentage (%)	2%	2%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$4,795	\$4,915	\$39,940	\$14,279	\$54,219	\$63,929
18	Capital Expenditure	\$0	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$244,561	\$250,675	\$306,205	\$109,470	\$415,675	\$910,911
20	HSA Revenues						
21	General Fund	\$68,477	\$70,189	\$85,737	\$30,652	\$116,389	\$255,055
22	State Funds	\$51,358	\$52,642	\$64,303	\$22,989	\$87,292	\$191,291
23	Federal Funds	\$124,726	\$127,844	\$156,165	\$55,830	\$211,994	\$464,565
24							
25							
26							
27							
28							
29	TOTAL HSA REVENUES	\$244,561	\$250,675	\$306,205	\$109,471	\$415,675	\$910,911
30	Other Revenues						
31							
32							
33							
34							
35							
36	Total Revenues						\$0
37	Full Time Equivalent (FTE)						
39	Prepared by: Karla Samayoa						Date: 12/01/2019
40	HSA-CO Review Signature: _____						
41	HSA #1						1/0/1900

Program Name: CalFresh Outbound Call Services 17-20
 (Same as Line 9 on HSA #1)

Salaries & Benefits Detail

11	12	POSITION TITLE	Agency Totals		For HSA Program		Original	Modification	Revised	TOTAL		
			Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE						
13	14	15	16	17	18	19	20	21	22	23		
					3/1/17 - 2/28/18	3/1/18 - 2/28/19	3/1/19 - 2/29/20	3/1/17 to 6/30/20				
		Enrollment Specialists (multiple)	\$39,520	100%	300%	300%	\$101,582	\$105,734	\$114,652	\$39,520	\$154,372	\$361,688
		Program Assistants (multiple)	\$41,600	100%	50%	50%	\$11,000	\$18,000	\$27,800	\$6,933	\$34,733	\$63,733
		Program Supervisors (multiple)	\$70,500	100%	33%	32%	\$35,000	\$15,000	\$15,295	\$7,755	\$23,050	\$73,050
		Director of Enrollment Services	\$110,000	100%	15%	10%	\$4,500	\$13,500	\$8,500	\$5,500	\$14,000	\$32,000
		Contracts & Grants Compliance Mgr	\$75,000	100%	4%	3%	\$3,000	\$3,000	\$1,875	\$1,000	\$2,875	\$8,875
		TOTALS		5.00	4.02	3.95	\$155,082	\$155,234	\$168,322	\$60,708	\$229,030	\$539,346
		FRINGE BENEFIT RATE	30.61%									
		EMPLOYEE FRINGE BENEFITS					\$45,684	\$52,526	\$53,293	\$18,583	\$71,876	\$170,086
		TOTAL SALARIES & BENEFITS	\$0				\$200,766	\$207,760	\$221,615	\$79,291	\$300,906	\$709,432
		HSA #2										

