



Mark Farrell, Mayor

MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

FROM: NOELLE SIMMONS, DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *J41*

DATE: MARCH 16, 2018

SUBJECT: CONTRACT MODIFICATION: UNIVERSITY CALIFORNIA, DAVIS (GOVERNMENT) FOR PROVISION OF CASE MANAGEMENT AND WELFARE FRAUD TRAININGS

CONTRACT TERM:	<u>Current</u> 7/1/2017 – 6/30/18	<u>Modification</u> 4/1/2018 – 6/30/2019	<u>Revised</u> 7/1/2017 – 6/30/2019		
CONTRACT AMOUNT:	<u>Current</u> \$63,750	<u>Modification</u> \$174,250	<u>Revised</u> \$238,000	<u>Contingency</u> \$17,425	<u>Total</u> \$255,425
ANNUAL AMOUNT:	<u>FY17-18</u> \$110,500	<u>FY18-19</u> \$127,500			
Funding Source					
MODIFICATION FUNDING:	<u>County</u> \$130,688	<u>State</u> \$20,910	<u>Federal</u> \$22,652	<u>Contingency</u> \$17,425	<u>Total</u> \$255,425
PERCENTAGE:	75%	12%	13%		

The Department of Human Services (DHS) requests authorization to modify the contract agreement with University of California, Davis to extend the duration for one year during period of July 1, 2018 to June 30, 2019, in an amount of \$174,250 plus a 10% contingency for a total amount not to exceed \$255,425. The purpose of the modification is to conduct additional Case Management trainings in the FY18-19 fiscal year and for the provision of Welfare Fraud trainings to be conducted in the FY17-18 fiscal year.

Background

Project 500 is a collaboration among the city’s main agencies serving low-income families: the San Francisco Human Services Agency (SF-HSA), the Department of Public Health (SF-DPH), and the Office of Child Support Services. Project 500 focuses intensive resources, wraparound

services, and case management across City departments and non-profit providers for 500 of the City's most at-risk families. The goal of Project 500 is to improve child and family outcomes by building better cross-system collaboration among service providers that are delivering a suite of stand-alone interventions in conjunction with one another.

CalWORKs has recently launched an initiative, known as CalWORKs 2.0, which shifts from compliance oriented, directive case management to customer-led case management focused on goals. This redesigned approach will help families set goals that are aligned with program aims while taking into account families' strengths and the obstacles they face as they engage in activities on the path to full employment.

The California Department of Social Services mandates that employees receive annual training in welfare fraud prevention and detection. UC Davis Center for Human Services utilizes curriculum approved by CDSS to provide HSA eligibility workers, non-eligibility staff, and investigators the trainings to protect the welfare system from fraud and abuse.

Services to be Provided

The Case Management trainings focus on social work intervention skills and tools, theoretical knowledge and best practices for working with families living in scarcity. Training participants will include staff from across several departments within the City and County of San Francisco and CBOs who are implementing Project 500 and CalWORKs staff. Under this modification, Contractor will provide a minimum of 30 Case Management full day trainings on-site in San Francisco during 7/1/2018 – 6/30/2019, with each training session holding up to 35 participants.

The Welfare Fraud trainings will present techniques that can help workers prevent fraud by educating clients, conducting thorough interviews, completing legal forms and following standard procedures. Workshop participants will gain a greater understanding of the federal and state requirements that govern the CalWORKs, CalFresh and Medi-Cal programs to assist them in their role of ensuring correct and accurate benefits are issued to applicants and recipients of aid. Under this modification, Contractor will provide 22 Welfare Fraud half-day trainings during 4/1/2018 – 6/30/2019 with each workshop allowing 30-35 participants.

Location and Time of Services

The CalWORKs and P500 Case Management trainings will occur over the course of 12 months, on a schedule to be jointly determined by HSA and the Contractor. The trainings will be delivered in whole or partial-day sessions in San Francisco, depending on the topics, at the Agency's facilities.

The Welfare Fraud trainings will be delivered in half-day sessions at the agency's facilities. Half-day session hours will be 8:00 AM – 12:00 PM and 1:00 PM – 5:00 PM conducted consecutively and by the same instructor.

Selection

For the Case Management trainings, HSA issued Request for Proposals (RFP) #719 in December 2016 to seek a provider for this program, but no bids were submitted. Due to this outcome, the Department invoked Admin Code 21.6 which enables departments to, when receiving no bids for

a solicitation, inspect the RFP document for unnecessary barriers to bid submission and—upon finding none—directly seek a contract with any provider. University of California, Davis’ training services were solicited, and they accepted the department’s request.

The provider for the Welfare Fraud training is a sole source selection. The University of California, Davis is the sole provider to offer the *only* training course certified by the California Department of Social Services that fully meets Division 20 requirements to be compliant.

Funding

Funding for this contract is provided by a combination of General Fund, State, and Federal funds.

ATTACHMENTS

Appendix A-1 – Services to be Provided (P500 Case Management Trainings)

Appendix A-2 – Services to be Provided (Welfare Fraud Trainings)

Appendix B-1 – Budget (P500 Case Management Trainings)

Appendix B-2 – Budget (Welfare Fraud Trainings)

Appendix A-1: Scope of Services to be Provided
University California, Davis
CalWORKs and Project 500 (P500) Case Management Training
Term: 7/1/2018 – 6/30/2019

I. Purpose of Grant

The purpose of the contract is to provide Social Work Specialist trainings for San Francisco Human Services Agency and Project 500 (P500) Partners, including the Human Services Agency, Department of Public Health, Department of Child Support Services and Office of Early Care and Education.

II. Definitions

CalWORKs	California Work Opportunity & Responsibility to Kids
DHS	San Francisco Department of Human Services, a division of HSA
HSA	San Francisco Human Services Agency
P500	Project 500, a collective impact initiative with the goal of interrupting the transmission of intergenerational poverty.

III. Target Population

Family social worker and other direct services staff across multiple City and County Departments including the Human Services Agency, Department of Public Health, Department of Child Support Services and Office of Early Care and Education.

IV. Description of Services

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

- A. Provide expert advice on the training program design and delivery for CalWORKs and P500 team members, and potentially to members of the Agency's internal Learning & Development team (i.e., train the trainer).
- B. Work with the CalWORKs and P500 management teams to collaboratively develop the training design, curriculum content and training delivery method. In partnership with P500 partner agencies, assess staff training needs and develop training curriculum recommendations.
- C. Deliver the training curriculum onsite in San Francisco to as many as 35 CalWORKs and P500 partner agency staff at a time over the year. Training to start within 15 days or sooner after getting HSA approval of the training curriculum.

- D. Collaboratively determine outcome measures/metrics for the evaluation of the training curriculum, including short and long-term process and outcome measures for the case workers, and the impact of this training program on the overall service delivery system.
- E. Make modifications to the training curriculum as needed based on participant feedback and evaluation results.
- F. Modify existing curriculum modules and/or develop new modules to accomplish specific training objectives, as determined by the needs assessment and approved by HSA.
- G. Meet with HSA executive staff to receive feedback on the draft training plan and proposed curricula. Modify as needed based on feedback.
- H. Provide HSA with copies of all training materials, which the Agency may modify and use at its sole discretion both during and after the contract term.
- I. Immediately subsequent to delivery of each training session, Contractor will gather participant feedback from 90% of participants on training format, delivery and content. Contractor will gather additional participant feedback between 30 and 60 days following each training session from 75% of participants to assess the relevancy of training content to actual practice, and the extent to which training participants are using the skills acquired in training. Contractor will use and evaluation forms approved by HSA.
- J. Training topics will include:
 - Strength-based Motivational Interviewing
 - Coaching Through Resistance/Crisis
 - Assessment and Case Management
 - Trauma-informed Case Coordination
 - Reflective Supervision
 - Professional Boundaries
 - Vicarious Trauma and Self-care
 - Effects of Toxic Stress on Executive Function
 - Motivational Interviewing and Client Coaching-goal setting techniques
 - Supervision as an interactive, collaborative and supportive partnership with line staff
 - Service Excellence Culture; Internal and External Customers (focus on soft skills)
 - Effective WtW Case Management (incorporating CalWORKs 2.0 approach and materials)
 - Others TBD in conjunction with HSA

V. HSA Responsibilities

- A. HSA will work with the Contractor to collaboratively develop the training design, curriculum content and training delivery method.

- B. HSA and Contractor will collaboratively establish training dates and times. HSA will secure training sites in San Francisco for the Contractor.
- C. HSA will assess staff training needs, and refer training participants to the trainings in accordance with these identified needs for each participant.

VI. Location and Time of Services

Trainings will occur over the course of 12 months, on a schedule to be jointly determined by HSA and Contractor. The trainings will be delivered in whole or partial-day sessions in San Francisco, depending on the topics, at the Agency's facilities.

VII. Service Objectives

- A. Each year, deliver a minimum of 30 training days onsite in San Francisco to as many as 35 staff persons per training.

VIII. Outcome Objectives

- A. At least 85% of participants who complete the initial evaluation form will indicate that the training effectively provided helpful information and social work tools for working with the CalWORKs and P500 populations.
- B. At least 85% of participants who complete the secondary evaluation 30-60 days after the training will indicate that they are actively using the knowledge and tools acquired during the trainings in their ongoing work with the CalWORKs and P500 populations.

IX. Reporting Requirements

- A. Provide monthly evaluation reports to HSA during follow-up consulting, due no later than the tenth day of the following month.
- B. Provide written summaries of participant evaluations.
- C. For assistance with reporting requirements or submission of reports, contact:

Judy Ng
HSA Contract Manager, Office of Contract Management
Email: Judy.ng@sfgov.org

- or -

Terri Austin, AP00
Project 500 Initiative Manager
Email: Terri.austin@sfgov.org

Appendix A-2: Scope of Services to be Provided
University California, Davis
Welfare Fraud Detection and Prevention Training
Term: 4/1/2018 – 6/30/2019

I. Purpose of Grant

The purpose of the contract is to provide Welfare Fraud Detection and Prevention Technique trainings for approximately 600 San Francisco Human Services Agency eligibility workers and for 100 non-eligibility staff/investigators across programs.

II. Definitions

SF-HSA – San Francisco Human Services Agency

III. Target Population

The target population is San Francisco Human Services Agency eligibility workers, non-eligibility staff, and investigators.

IV. Description of Services

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

Welfare Fraud Detection and Prevention Technique Trainings: The 22 half-day workshops allowing 30-35 staff per session for Welfare Fraud Detection and Prevention Technique trainings presents techniques that can help workers prevent fraud by educating clients, conducting thorough interviews, completing legal forms, and following standard procedures.

Training topics will include:

- the worker's role in fraud prevention and detection
- interview techniques for thorough eligibility determination
- inconsistencies and other fraud indicators
- fraud detection resources

As a result of this workshop, participants increase their ability to detect fraud and help clients avoid fraud.

Key Eligibility Factors for Welfare Fraud Investigators: Familiarity of key factors of eligibility is essential to the completion of a thorough and effective investigation of potential fraud. This workshop will review these factors.

Training Topics will include:

- household composition
- resources
- income
- verification
- reporting requirements

Participants of this workshop will gain a greater understanding of federal and state requirements that govern the CalWORKs, CalFresh, and Medi-Cal programs to assist them in their role of ensuring correct and accurate benefits are issued to applicants and recipients of aid.

V. Location and Time of Services

The training will be delivered in half-day sessions at the agency's facilities. Half-day session hours will be 8:00AM – 12:00PM and 1:00PM – 5:00PM conducted consecutively and by the same instructor.

VI. Service Objectives

Contractor will provide 22 half-day training sessions for 700 SF-HSA Staff.

VII. Outcome Objectives

A post-test will be administered at the end of trainings with a minimum of 80% of participants demonstrating a basic knowledge of welfare fraud and fraud detection.

VIII. Reporting Requirements

- A. Provide monthly evaluation reports to HSA during follow-up consulting, due no later than the tenth day of the following month.
- B. Provide written summaries of participant evaluations.
- C. For assistance with reporting requirements or submission of reports, contact:

Judy Ng
HSA Contract Manager, Office of Contract Management
Email: judy.ng@sfgov.org

- or -

Katrina Williams
Learning & Organizational Development Manager
Email: katrina.williams@sfgov.org

Appendix B-1 – Calculation of Charges
University of California, Davis
CalWORKs and P500 Case Management Training
Term: 7/1/2018 – 6/30/2019

I. Method of Payment

Contractor shall submit monthly invoices by the fifteenth (15th) working day of each month, based upon the number of units of service that were delivered in the immediately preceding month. All training days associated with the Services listed in Appendix A-1, times the unit rate as shown in the Fee Schedule listed below shall be reported on the invoice(s) each month.

II. Fee Schedule and Final Invoice

Fee Schedule is listed below:

- I. Rate per training day: \$4,250
- II. Total number of training days: 30
- III. \$4,250 rate per training day x 30 days of training = \$127,500

Appendix B-2 – Calculation of Charges
University of California, Davis
Welfare Fraud Detection and Prevention Training
Term: 4/1/2018 – 6/30/2019

1. Method of Payment

Contractor shall submit monthly invoices by the fifteenth (15th) working day of each month, based upon the number of units of service that were delivered in the immediately preceding month. All training days associated with the Services listed in Appendix A, times the unit rate as shown in the Fee Schedule listed below shall be reported on the invoice(s) each month.

2. Fee Schedule and Final Invoice

Fee Schedule is listed below:

- I. Rate per half-day training session: \$2,125 (or \$4,250 per full day session)
- II. Total number of training days: 22 half-day sessions (or 11 full days)
- III. \$2,125 rate per half-day training x 22 half-day sessions = \$46,750