



Edwin M. Lee, Mayor

Department of Human Services  
Department of Aging and Adult Services

Trent Rhorer, Executive Director

**MEMORANDUM**

**TO:** AGING & ADULT SERVICES COMMISSION

**THROUGH:** SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

**FROM:** MELISSA MCGEE, ACTING DEPUTY DIRECTOR  
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

**DATE:** JUNE 1, 2016

**SUBJECT:** CONTRACT RENEWAL: **HANSINE FISHER AND ASSOCIATES (FOR-PROFIT) TO PROVIDE CSBG-HR TIME STUDY MODULE AND RELATED CONSULTATION SERVICES**

	<u>Current</u>	<u>Renewal</u>	<u>Contingency</u>	<u>Total</u>	
<b>GRANT TERM:</b>	7/1/13- 6/30/16	7/1/16- 6/30/18			
<b>GRANT AMOUNT:</b>	\$60,000	\$40,000	\$4,000	\$44,000	
<b>ANNUAL AMOUNT:</b>	<u>FY 16/17</u> \$20,000	<u>FY 17/18</u> \$20,000			
<b>FUNDING:</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>PERCENTAGE:</b>	\$22,000 55%	\$4,000 10%	\$14,000 35%	\$4,000	\$44,000 100%

The Department of Aging and Adult Services (DAAS) requests authorization to renew the contract with Hansine Fisher and Associates (HFA) for the period of July 1, 2016 to June 30, 2018, in the amount of \$40,000 plus a 10% contingency for a total contract amount not to exceed \$44,000. The purpose of this contract is to assist the Human Services Agency’s Department of Aging and Adult Services (DAAS) and Department of Human Services (DHS) in implementing its Title XIX County Services Block Grant-Health Related (CSBG-HR) activities according to State and Federal Regulations.

**Background**

Through CSBG-HR, the Departments are able to leverage federal funding from Title XIX of the Social Security Act to partially reimburse the costs of performing medically-related case management activities for adults who have MediCal or who are eligible for it. To accomplish this task, the Departments require a

time-study module capable of keeping accurate records of community based organization staff time dedicated to CSBG-HR activities. These time studies are used to track the amount of time an employee spends performing those activities. The resulting proportion of time is reported to and then used by the Federal entity that oversees County Services Block Grant to determine the proportion of DAAS/DHS costs that are reimbursed.

### **Services to be Provided**

Contractor will host, maintain, and manage a web-based time-study module according to the specifications by DAAS/DHS. Further, the Contractor will then be responsible for identifying time survey participants from DAAS/DHS, and coordinating with participants to collect time survey information. Training and technical support will be provided by Contractor throughout the time survey period to users.

This online module will streamline time study reporting by DAAS and DHS service providers (approximately 200 users), and facilitate proper claiming of federal revenue.

### **Performance**

Contractor does not receive annual fiscal and compliance monitorings due to their for-profit organizational status.

Program managers from DAAS and DHS are regular users of this database and in regular contact with contractor staff. The contractor is always responsive to any questions and requests. There are no performance concerns from department staff that run and utilize the database for reports.

### **Selection**

Contractor was selected through Informal Bid (IB) #561 for CSBG-HR Time Study Online Module and Related Consultation Services, issued in August 2013.

### **Funding**

This contract is supported by 55% County General funds, 10% State funds, and 35% Federal funds.

### **ATTACHMENTS**

Appendix A – Scope of Services

Appendix B – Calculation of Charges

**Appendix A – Scope of Services**  
**Hansine Fisher and Associates**  
**CSBG-HR Time Study Online Module and Related Consultation Service**  
July 1, 2016 – June 30, 2018

**I. Purpose of Contract**

The purpose of this contract will be to assist the Human Services Agency’s Department of Aging and Adult Services (DAAS) and Department of Human Services (DHS) in implementing its Title XIX County Services Block Grant-Health Related (CSBG-HR) activities according to State and Federal Regulations.

Through CSBG-HR, the Departments are able to leverage federal funding from Title XIX of the Social Security Act to partially reimburse the costs of performing medically-related case management activities for adults who have Medicaid (Medi-Cal) or who are eligible for it.

The tool and consulting services funded through this contract will streamline time study reporting by DAAS and DHS service providers and facilitate proper claiming of federal revenue.

**II. Definitions**

Contractor	Hansine Fisher & Associates
CSBG-HR	County Services Block Grant – Health Related
HSA	Human Services Agency of the City and County of San Francisco
DAAS	Department of Aging and Adult Services
DHS	Department of Human Services

**III. Description of Services**

The tool and consulting services funded through this contract will streamline time study reporting by DAAS and DHS service providers (consisting of about 200 users) and facilitate proper claiming of federal revenue.

On an annual basis, Contractor will provide the following services to DAAS/DHS:

- Maintain a web-based time-study module according to the specifications provided by DAAS/DHS and make necessary changes as requested by DAAS/DHS, within the limitations of the contact amount.
- Host the website and servers in a secure environment.
- Manage website content.

- Send a file format to DAAS/DHS to collect identifying information on time survey participants and upload data into the web-based system.
- Send test e-mails to participants prior to the start of the time survey month, send welcome emails to all participants, launch a web-based time survey, and provide technical support during the time survey period.

Contractor will provide the following CSBG-HR-related services to DAAS/DHS:

- Make necessary updates to day-log system within the limitation of the contract budget, including new labels on time survey fields to align with DAAS/DHS time survey.
- Update time survey with basic data, vendors, activity codes, etc.
- Load/assist with initial participant and reviewers' access to system.
- Prepare and send a "welcome" email to participants, prepare instructions for completing the time survey and login information to go with the email.
- Provide an output file of time survey results by participant, job class, activity code in an exportable .csv format for use with Excel.
- Provide time survey paper printout that looks exactly like what is currently used.
- Provide and post on-line customized quick video tutorial on how to complete the time survey.
- Provide and post on-line customized quick video tutorial for the supervisors on how to approve the time survey.
- Provide and post on-line customized quick video tutorial within a month of new tutorial requests.

#### **IV. Deliverables**

On an annual basis, the Contractor is expected to provide the following deliverables:

- Web-based time survey system that produces complete time survey forms for each staff. Information of the staff will be provided by DAAS/DHS staff.
- Provide either on-line or telephone technical assistance to users for issues or problems that DAAS/DHS designated intermediaries are not able to resolve.

#### **V. Outcome Objective:**

At least 80% of the users who respond to the user satisfaction survey are satisfied with the technical support given by the Contractor, including timely responses to problems or issues that may occur.

#### **VI. Reporting Requirements**

A. Contractor will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section IV - Deliverables. This report will also include accomplishments and challenges encountered by the Contractor. Contractor will enter the annual metrics in the CARBON database by the 15<sup>th</sup> of the month following the end of the program year.

B. Contractor will provide Ad Hoc reports as required by the Department.

C. Contractor will provide an annual user satisfaction survey report to DAAS/DHS within 15 days after the year end. This should include user satisfaction data that is gathered from surveys that follow immediately after users have watched video tutorials and/or have been provided technical assistance.

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

Justin.Chan@sfgov.org  
Contract Manager, Office of Contract Management

and

Michael.Zaugg@sfgov.org  
Program Analyst, Department of Aging and Adult Services

and

Briana.Moore@sfgov.org  
Family Permanent Supportive Housing Program Manager, DHS - Housing & Homeless Services

## **VII. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of the deliverables and outcome objective.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Contractor'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.

**Appendix B - Calculation of Charges**  
**Hansine Fisher and Associates**  
**CSBG-HR Time Study Online Module and Related Consultation Service**  
 July 1, 2016 – June 30, 2018

- I. The City and County of San Francisco agrees to pay the Contractor for the scope of work specified in Appendix A at the following rates:

Service	Rate:	Estimated Hours:	Estimated Total:
Technical Svc/Project Support Mgr	\$85.00	242.82	\$20,640
Programmer/Development	\$110.00	176	\$19,360

- II. The contract amount shall not exceed \$40,000.
- III. The Contractor will submit a quarterly invoice detailing hours of service, tasks completed, and amount charged by week. Invoices will be accompanied with receipts for all expenses incurred and detailed summary of activities performed. The contractor will maintain a record describing hours and activities provided.
- IV. Contractor understands that, of the maximum dollar obligation listed in Section 5 of this Agreement, **\$4,000** is included as a contingency amount and is neither to be used in Program Budgets attached to this Appendix, or available to Contractor without a modification to this Agreement executed in the same manner as this Agreement or a revision to the Program Budgets of Appendix B, which has been approved by Contract Administrator. Contractor further understands that no payment of any portion of this contingency amount will be made unless and until such modification or budget revision has been fully approved and executed in accordance with applicable City and Department of Public Health laws, regulations and policies/procedures and certification as to the availability of funds by Controller. Contractor agrees to fully comply with these laws, regulations, and policies/procedures.
- IV. No invoices for Services provided by law firms or attorneys, including, without limitation, as subcontractors of Contractor, will be paid unless the provider received advance written approval from the City Attorney.