



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

P.O. Box 7988
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London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

FROM: ANNA PINEDA, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DATE: JUNE 21, 2024

SUBJECT: NEW CONTRACT: **EXEMPLAR HUMAN SERVICES LLC (FOR PROFIT)** TO PROVIDE ESSS PERFORMANCE MANAGEMENT REPORTING SERVICES

DS
EB

CONTRACT TERM: 8/1/2024 – 6/30/2026

CONTRACT AMOUNT:	<u>New</u>	<u>Contingency</u>	<u>Total</u>
	\$575,000	\$57,500	\$632,500

ANNUAL AMOUNT:	<u>FY24/25</u>	<u>FY25/26</u>
	\$275,000	\$300,000

<u>Funding Source</u>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$115,000	\$132,250	\$327,750	\$57,500	\$632,500
PERCENTAGE:	20%	23%	57%		

The Department of Benefits and Family Support (BFS) requests authorization to enter into a contract with Exemplar Human Services LLC for the period of August 1, 2024 to June 30, 2026, in an amount of \$575,000 plus a 10% contingency for a total amount not to exceed \$632,500. The purpose of the contract is to provide performance management reporting services to assist the San Francisco Human Services Agency in its efforts to improve service effectiveness for the Economic Support and Self-Sufficiency programs.

Background

In the Fall of 2023, SFHSA migrated to the California Statewide Automated Welfare System (CalSAWS), which supports eligibility and benefits determination and public assistance case management across California. Data and reporting tools previously used are no longer supported, which has created challenges for SFHSA staff in accessing operational data and reporting needed to manage workload and client engagement.

Exemplar services help California counties gain insights from their information and guide them in taking data-driven actions. Exemplar's data and analytic reporting tools are currently serving 16 additional California counties including Contra Costa, San Mateo, and Santa Clara counties.

Services to be Provided

Services will include custom data reporting, daily report production, and performance analytics. Reports will be used to support the performance and compliance mandates in ESSS programs by leveraging CalSAWS and other related system extracts. The package of reports, data, and outputs provided through this contract are focused on the metrics and outcomes for ESSS programs administering benefits and services to clients.

Selection

Grantee was selected through Request for Proposals 1139, which was competitively bid in May 2024.

Funding

Funding for this grant is provided entirely by City, Federal and State funds.

ATTACHMENTS

Appendix A – Services to be Provided

Appendix B – Budget

Appendix A
Services to be provided by
Exemplar Human Services, LLC
Performance Management Reporting Services
August 1, 2024 – June 30, 2026

I. Purpose of Contract

The purpose of this contract is to provide performance management reporting services to assist the San Francisco Human Services Agency in its efforts to improve timeliness of service delivery to clients and overall service effectiveness for the Economic Support and Self-Sufficiency programs as prescribed in program regulations.

II. Definitions

BFS	Department of Benefits and Family Support
CAAP	County Adult Assistance Program, an HSA program that offers cash assistance and employment services to low-income adults with no dependent children and to qualifying immigrants.
CalSAWS	California Statewide Automated Welfare System, an online, real-time computer program that supports the administration of public assistance programs in California, including CalWORKs, CalFresh, Medi-Cal, General Assistance, Foster Care, and case management functions for Employment Services
CalFresh	Formerly known as Food Stamps; the California version of the Federal Supplemental Nutrition Assistance Program, which provides low-income households money to purchase groceries
CalWORKs	California Work Opportunity and Responsibility to Kids, welfare-to-work program for families receiving Temporary Aid to Needy Families (TANF) cash aid.
CARBON	Contracts Administration, Reporting, and Billing Online database
Contractor	Exemplar Human Services, LLC (Exemplar)
ESSS	Economic Support and Self-Sufficiency Division of SFHSA-BFS, which administers CAAP, CalFresh, CalWORKs, Medi-Cal, and workforce development programs
IT	Information Technology Department at HSA
Medi-Cal	California’s Medicaid health program, which provides free or low-cost health insurance for low-income individual, including a wide range of health benefits and services

SFHSA	San Francisco Human Services Agency
Welfare-to-Work	Program within ESSS designed to assist welfare recipients to obtain or prepare for employment
ZixCorp	An Email Encryption and Email Data Loss Prevention system used by HSA

III. Description of Services

Services include custom data reporting, daily report production, and performance analytics to support the performance and compliance mandates in Economic Support and Self-Sufficiency by leveraging CalSAWS and other related system extracts. The package of reports, data, and outputs provided through this contract are focused on the metrics and outcomes for SFHSA's ESSS programs administering benefits and services to clients.

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

- A. Provide HSA with an enhanced eligibility caseload management tool for staff to view their workload in a comprehensive detailed (case level) and summary format. This tool is to inform staff of how to prioritize their cases and what and when to take eligibility actions, such as but not limited to all CalFresh pending applications (under 30 days and over 30 days), Inter-County Transfer cases, expedited services, all Medi-Cal application pending (under 45 and over 45 days), CalSAWS tasks, and other cases needing to be dispositioned.
- B. Work closely with the HSA Programs and IT to develop and customize an eligibility caseload tool/reports to facilitate HSA's achievement of desired outcomes.
- C. Validate the report as they are initially created and prior to full implementation when modifications or changes are made, and when data discrepancies are detected on the tool/report.
- D. Provide SFHSA with a description of each report that includes a definition of the various data points to provide background and information to anyone new to the tool.
- E. Issue reports daily in a secured email format to agreed-upon list of Eligibility workers supervisors and managers that provide information on intake pending applications, intake processing, continuing eligibility, continuing processing, daily EDBC alerts, and a rollup dashboard of these reports for management and executive team to see in an aggregate format. This is to assist HSA to better serve clients and effectively run program operations.
- F. Share any and/or all operational alert and/or trigger reports in Contractor's portfolio used by other CalSAWS counties as a reference tool. This applies to base alert and/or trigger reports using only CalSAWS data and not multiple data sources.
- G. Provide HSA with capability to set customized thresholds for alerts or triggers on the report that are parameterized. For example, the threshold for number of consecutive days for pending applications can be specified.
- H. Ensure the alerts will report on whether performance is in desirable ranges as defined by HSA, which may be updated at HSA request throughout the term of this contract. When

performance falls below minimum thresholds, HSA will receive appropriate alerts relevant to their areas of responsibility, informing HSA to follow-up or take appropriate action with the cases that require attention.

- I. Ability to make timely changes to existing reports to reflect legislative, regulatory and policy changes impacting SFHSA ESSS Programs. Contractor will retain the right to determine scope and determine when and how much additional cost may be incurred as a result of changes.
- J. On a daily basis, use the most updated CalSAWS and web portal data based on agreed and determined upon schedule or time by HSA Programs and IT to generate the daily reports that consists all the required data parameters.
- K. The Contractor will respond to system failures within 24 hours and rerun and provide an updated report upon detection of corrupted data.
- L. The Contractor will provide a single point of contact to resolve individual case data issues.
- M. The Contractor will provide a single point of contact to work with HSA management to develop new alerts.
- N. The Contractor will present and discuss the results to HSA-designated management team on a monthly basis.
- O. The Contractor will attend all requirements gathering meetings on-site in San Francisco.
- P. Contractor will use any HSA-provided data and systems access solely for the purpose of fulfilling the services described in this Agreement, and for no other use or purpose.
- Q. Contractor will protect the confidentiality of HSA data in accordance with State and Federal Privacy and Confidentiality laws.
- R. Contractor will share all documentation relevant to the data solution with HSA including business requirement document, data mapping document and design documents, provided that this does not include proprietary code or other proprietary information.
- S. For the data returning to HSA, Contractor will provide HSA with the data dictionary in order for HSA to be able to load the data (if needed) and understand the data fields to do further analysis.

IV. HSA Responsibilities

- A. Notify Contractor of changes to HSA key performance activity and trends, performance objectives, and desirable ranges, as well as CalSAWS releases and infrastructure changes to assist Contractor in updating reports.
- B. Provide Contractor access via a secure connection to a secure FTP server for purposes of accessing data extracts to produce daily reports.
- C. Ensure data is refreshed daily and in the format agreed upon between the Contractor and HSA-IT.
- D. Provide a single point of contact for communication of ongoing business needs and problem resolution.
- E. Provide detailed business requirements for new requests when needed.
- F. Provide Contractor with access to ongoing daily incremental CalSAWS data files which will be delivered via SFTP.

V. Location and Time of Services

All data collection and reporting meetings, user interviews, and project team meetings may be on site in San Francisco CA or virtual as needed.

VI. Service Objectives

- A. Daily email delivery of the reports noted above by 8AM, assuming HSA has the data ready timely
- B. 4 hour response to system errors or failed report distribution
- C. 24 hour response to inquiries related to case data issues
- D. 3 business days response to evaluate new report requests/report change requests

VII. Reporting Requirements

- A. Contractor will provide monthly reports that outline the services provided including the flat monthly fee. The monthly reports are due 15 days after the end of the month and are required to accompany invoices for payment. Invoices are to be submitted in the CARBON database.

- B. Contractor will work with Phillip Mau, who will serve as the principal contact person between Contractor staff and San Francisco County.
 - ESSS contact is Phillip Mau, phillip.mau@sfgov.org
 - WTW Program Monitor is Marlén Sánchez, marlen.sanchez@sfgov.org
 - HSA IT contact is Sahil Rahim, sahil.rahim@sfgov.org
 - Office of Contracts Management contact is Leslie Lau, leslie.lau1@sfgov.org

**Appendix B – Calculation of Charges
Exemplar Human Services, LLC
Performance Management Reporting Services
August 1, 2024 - June 30, 2026**

- I. SFHSA agrees to pay the contractor a monthly reporting service fee of **\$25,000** for the performance management services described in **Appendix A**.

- II. The annual cost for services are as follows:

FY 24/25	\$275,000
FY 25/26	\$300,000
Total Amount	\$575,000

- III. Contractor will invoice on a monthly basis for actual services provided, in to CARBON.

- IV. Contingent amount up to \$57,500 may be available at the City’s Sole and absolute discretion

- V. **The total contract will not exceed \$632,500 for the period between August 1, 2024 and June 30, 2026.**