



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

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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: JULY 28, 2022

SUBJECT: NEW CONTRACT: **CIVIC EDGE CONSULTING (FOR PROFIT)** TO DEVELOP AND DELIVER A COMPREHENSIVE DIGITAL MEDI-CAL HANDBOOK

CONTRACT TERM: 8/1/2022 – 6/30/2024

CONTRACT AMOUNT:	<u>New</u>	<u>Contingency</u>	<u>Total</u>		
	\$179,995	\$18,000	\$197,995		
FUNDING:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
PERCENTAGE:	\$179,995			\$18,000	\$197,995
	100%				

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The Department of Benefits and Family Support (BFS) requests authorization to enter into a contract with Civic Edge Consulting for the period of August 1, 2022 to June 30, 2024, in an amount of \$179,995 plus a 10% contingency for a total amount not to exceed \$197,995. The purpose of the contract is to provide professional services to develop and deliver a comprehensive digital Medi-Cal handbook.

Background

Medi-Cal is California’s Medicaid health care program. This program pays for a variety of medical services for children and adults with limited income and resources. The Medi-Cal program’s eligibility policies and procedures are ever changing and can be very complex. New or updated federal and state guidance are released regularly to counties. Currently, the SFHSA Medi-Cal program does not have a formal policy handbook for its staff to use.

The Department is suggesting a two-year term, in case of delays, such as Covid outbreak, which have become more common since 2020. The budget currently reflects one year, with the second as a prudent reserve.

Services to be Provided

Under the guidance and instruction of SFHSA Economic Support and Self-Sufficiency (ESSS)/San Francisco Benefits Net (SFBN) staff and in collaboration with stakeholders, the contractor shall provide all professional services required to develop and deliver the contents of a digital comprehensive Medi-Cal handbook (hereinafter referred to as the handbook).

The handbook will be used to support the skills, knowledge and continued learning of SFHSA ESSS/SFBN staff, of which Medi-Cal is a part. The contractor shall work predominantly with and under the guidance of ESSS/SFBN staff to plan, design, and create the final product. The contractor shall be responsible for the handbook contents, including any related collateral material, content, and training. The digital/ web-based platform (hereinafter referred to as the platform) that will house the handbook will be developed separately by SFHSA IT. The contractor will work collaboratively with IT to ensure that the final product will transition and upload smoothly into the platform and will be maintainable on the platform.

The handbook shall include program policies and procedures, relevant examples and scenarios, best practices, and other content in a logical, searchable, and easy-to-read format. Once the contractor furnishes the final product, ESSS/ SFBN staff shall be responsible to maintain and update the handbook. To help ensure a clean handoff, the contractor shall develop and provide training to ESSS/ SFBN staff on how to maintain, edit, and use the work product.

Selection

Contractor was competitively selected from the Controller’s prequalified list, Sourcing ID #6404 under Area #2, Stakeholder Engagement Services.

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
Medi-Cal Handbook Consultant
Term: August 1, 2022 – June 30, 2024

I. Purpose of Contract

The purpose of the contract is to provide professional services in the area of development and delivery of a comprehensive digital Medi-Cal handbook (hereinafter referred to as the handbook). The handbook will be used to support the skills, knowledge and continued learning of SFHSA ESSS/ SFBN staff. The contractor shall work predominantly with and under the guidance of ESSS/ SFBN staff to plan, design, and create the final product. The contractor shall be responsible for the handbook contents, including any related collateral material, content, and training. The digital/ web-based platform (hereinafter referred to as the platform) that will house the handbook will be developed separately by SFHSA IT. The contractor will also be required to work collaboratively with IT to ensure that the final product will transition and upload smoothly into the platform and will be maintainable on the platform.

The handbook shall include program policies and procedures, relevant examples and scenarios, best practices, and other content in a logical, searchable, and easy-to-read format. Once the contractor furnishes the final product, ESSS/ SFBN staff shall be responsible to maintain and update the handbook. To help ensure a clean handoff, the contractor shall develop and provide training to ESSS/ SFBN staff on how to maintain, edit, and use the work product.

The contractor requirements for the handbook are detailed below in the Description of Services.

II. Definitions

ESSS	Economic Support and Self Sufficiency
IT	Information Technology
SFHSA	San Francisco Human Services Agency
SFBN	SF Benefits Net (term used to describe the integration of San Francisco's Medi-Cal and CalFresh programs into one service delivery model)

III. Target Population

The target population for this contract is ESSS/ SFBN staff.

IV. Description of Services

Under the guidance and instruction of ESSS/ SFBN staff and in collaboration with stakeholders, the contractor shall provide all professional services required to develop and deliver the contents of a digital comprehensive Medi-Cal handbook.

The final product excludes the completion of the platform that will house the handbook. SFHSA IT is responsible to develop and furnish the aforementioned platform. The contractor shall develop the content utilizing tool(s) that will interoperate with the platform so that the content can be maintained and updated after delivery.

The project will be divided into the following five phases and timeframes:

Project Phase	Timeframe
<p>1.) Planning and Coordination</p> <ul style="list-style-type: none"> a) Meet with key SFHSA ESSS/ SFBN staff to discuss scope, deliverables, key handbook features, and locate where any existing documentation live. b) Develop a project timeline and breakdown the schedule (ie. Gantt chart) c) Prepare a draft table of contents d) Identify any gaps from existing written documentation that will need to be developed. e) Develop a communications strategy to promote the new handbook to staff. 	Month 1 - 2
<p>2.) Project Design</p> <ul style="list-style-type: none"> a) In collaboration with SFHSA IT staff and stakeholders, discuss, identify, and incorporate key design features that will enable a smooth transition/upload and maintenance of the handbook contents and collateral materials into the web-based platform. b) In collaboration with SFHSA IT staff, select tool(s) to be used for creating and maintaining content on the platform. c) Select a layout, format, and other features for the handbook. 	Months 2 – 3
<p>3.) Organize and Write</p> <ul style="list-style-type: none"> a) With guidance from ESSS/ SFBN staff, gather, interpret, and write Medi-Cal policy and procedures in easily understandable language. Gathering all existing written documentations may start sooner to guide phase 2 deliverables. b) Organize, prepare for upload, and reformat existing documentation for transition into platform. 	Months 2 – 11
<p>4.) Staff Training</p> <ul style="list-style-type: none"> a) Develop a handbook maintenance guide for policy staff who will continue to maintain and develop the work product. This maintenance guide along with training materials will focus on how to update materials, create new content, and troubleshoot potential issues. In addition, develop an end user guide for all other staff who will be accessing the handbook, to provide an orientation on how to navigate, access, and retrieve information from the handbook. 	Month 10 - 12

5.) Project Close – Finalize and Review a) Identify lessons learned or best practices in an electronic/written format b) Handoff	Month 12
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*Note: Timeframes are subject to change. Some timeframes overlap.

Requested Training Formats:

1. Classroom – Offered in up to a 2-hour traditional training format on-site at SFHSA or
2. E-learning - The use of electronic means to disperse training using electronic technologies on Microsoft Teams or Zoom.

V. Location and Time of Services

The bulk of the contractor’s work shall be done in their offices. When necessary, the contractor will work directly with SFHSA ESSS/ SFBN and IT staff, such as attending face-to-face meetings primarily at 1440 Harrison Street or 1650 Mission Street, San Francisco, CA 94103. Initial meetings will be held virtually via Microsoft Teams or Zoom while the COVID-19 public health emergency remains in effect. Communications and correspondence can also happen by phone or email as appropriate.

VI. Performance Measures (Service & Outcome Objectives)

The following table outlines the scope of work for this engagement and deliverables to be provided:

Project Phase	Deliverables
1.) Planning and Coordination	<ul style="list-style-type: none"> -Project schedule or Gantt chart -Bi-weekly status updates -Identify tool(s) contractor will use to develop the handbook contents and collateral materials. NOTE: The tool(s) identified must interoperate with the platform, and be familiar to ESSS/SFBN staff who will assume responsibility of updating/maintaining the work product once the contractor departs. -Draft table of contents -List of potential gaps in existing documentation that need to be written -Communications strategy/plan
2.) Design and Build	<ul style="list-style-type: none"> -Write-up of layout, format, and other key features that will help ensure the final product will easily transition/upload into the platform to be developed by SFHSA IT -Include in the write-up any recommendations on handbook features and design that the contractor

	believes will improve the overall usability of the platform. Examples include: Key word search, ability to show prior updated information, clean (uncluttered layout), etc. -Write-up of a handbook maintenance guide as well as an end user guide as defined in item 4 under Project Phase table above.
3.) Organize and Write	-Bi-weekly status updates-Draft new handbook sections/content
4.) Staff Training	-Training curriculum and collateral materials
5.) Project Close	-Final handbook content and collateral materials developed and delivered on-time - Final handbook maintenance and end user guides - Final summary report highlighting contract activities, including accomplishments and challenges encountered by the contractor to be entered into CARBON database

VII. Reporting Requirements

- A. Contractor will provide a **monthly** report of activities, referencing the tasks as described in Section VI Performance Measures. Contractor will enter the monthly metrics in the CARBON database by the 15th of the following month.
- B. Contractor will provide a final report summarizing the contract activities. This report will also include accomplishments and challenges encountered by the contractor. Contractor will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
- C. Contractor will provide Ad Hoc reports as required by SFHSA.
- D. Contractor shall respond timely, within 24 hours, to SFHSA correspondence and inquiries.
- E. For assistance with reporting requirements or submission of reports, contact:

Tara.Alvarez@sfgov.org

Contract Manager, Office of Contract Management

or

Ana.Marie.Lara@sfgov.org

Program Analyst, CalFresh & Medi-Cal

VIII. Monitoring Activities

Program Monitoring: Program monitoring will include regular monthly meetings with contractor to discuss progress towards meeting service and outcome objectives.

Appendix B
Civic Edge - Medi-Cal Handbook Consultant
August 1, 2022 – June 30, 2024

Tasks	Assumptions	Partner	Senior Account Manager	Senior Graphic Designer	Project Manager		
		\$275.00	\$190.00	\$135.00	\$165.00	SUBTOTALS	
Task 1: Planning and Coordination							
1.1	Project schedule or Gantt chart	Draft, one round of review, then final	2	2	2	\$1,200.00	
1.2	Bi-weekly status updates	Via email for 12 months	6	24	6	6	\$8,010.00
1.3	Draft table of contents	Assumes ~40 chapters, draft, two rounds of review, then final	10	15	5	\$6,275.00	
1.4	List of potential gaps that need to be written	Includes meetings with SFHSA staff, draft, one round of review, then final	10	10	5	\$5,325.00	
1.5	Communications strategy / plan	Draft, one round of review, then final	5	5	5	\$3,000.00	
1.6	Weekly or bi-weekly check-ins	30-minutes by phone or zoom weekly for 6 months, bi-weekly for 6 months - cadence TBD by project team	9	18	18	9	\$9,810.00
						\$33,620.00	
Task 2: Design and Build							
2.1	Write up of platform layout and recommendations for key features	Draft template, two rounds of review, then final	5	5	30	\$6,375.00	
2.2	Maintenance and end user guide	Draft, two rounds of review, then final	5	15	15	\$6,250.00	
2.3	Coordination of platform build	Minimal hours for any coordinating with in-house technical team as they build platform	5	10	10	\$4,625.00	
						\$17,250.00	
Task 3: Organize and Write							
3.1	Update current drafts	Assumes 40 chapters, 50 pages each, 30 mins per page, draft one round of review, then final	50	225		250	\$97,750.00
3.2	Write new materials	Assumes 25 new pages	15	25		25	\$13,000.00
3.3	Content coordination with in-house technical team	Sharing content ready for upload, problem solving, etc.	5	15	5	\$4,900.00	
						\$115,650.00	
Task 4: Staff Training							
4.1	Staff training curriculum and collateral materials	PPT deck and draft training materials, assumes one round of review, then final	10	15	5	\$6,275.00	
						\$6,275.00	
Task 5: Project Close							
5.1	Final Medi-Cal handbook content	See 3.3				\$0.00	
5.2	Final handbook maintenance and end user guide	See 2.2				\$0.00	
5.3	Final summary report highlighting contract activities	High level overview of completed deliverables	2	2	2	\$1,200.00	
5.4	3-month review of handbook	Meeting or interviews with Policy team and SFBN staff, updates to address minor fixes	10	10	10	\$6,000.00	
						\$7,200.00	
TOTALS			\$40,975.00	\$75,240.00	\$15,930.00	\$47,850.00	\$179,995.00