



Edwin M. Lee, Mayor

Department of Human Services
Department of Aging and Adult Services

Trent Rhorer, Executive Director

MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

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

DATE: MARCH 17, 2017

SUBJECT: GRANT RENEWAL: 211 SAN DIEGO (NON-PROFIT) FOR CALFRESH BENEFITS LINKAGES

	<u>Current</u>	<u>Renewal</u>	<u>Contingency</u>	<u>Total</u>	
CONTRACT TERM:	3/1/15 - 2/28/17	3/1/17- 2/28/19			
CONTRACT AMOUNT:	\$514,400	\$477,192	\$47,719	\$524,911	
ANNUAL AMOUNT:	FY 17/18 \$238,596	FY18/19 \$238,596			
FUNDING SOURCE	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$71,578	\$167,018	\$238,596	\$47,719	\$524,911
PERCENTAGE:	15%	35%	50%		100%

The Human Services Agency (HSA) requests authorization to renew the grant with 211 San Diego for the period of March 1, 2017 to February 28, 2019 in a total amount not to exceed \$524,911. The purpose of the grant is to reduce hunger and improve health in San Francisco by generating new approvable applications. This modification proposes to increase the number of CalFresh/Medi-Cal recipients participating in this program.

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 half of the food insecure population (approximately 100,000 individuals) is receiving CalFresh benefits.



For the past six years, San Diego 211 has served as the lead of the largest CalFresh Benefits Linkages contract in the nation, responsible for training 21 subcontractors to perform CalFresh benefits linkages services and to provide appropriate referrals to local community resources. Their work is renowned for being cutting-edge and highly effective, often cited as a “best practice” for CalFresh client engagement. Since 2010, 211 San Diego has successfully operated an outbound call/mail campaign in San Diego, and recently won a grant from the California Department of Social Services in 2014 to dramatically expand its efforts. Currently working in four counties conducting CalFresh benefits linkages, 211 San Diego is highly equipped to run a similar campaign in San Francisco.

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 will provide 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 application follow-through. Grantee will deliver all benefits linkages materials, communication and correspondence in languages comprising but not limited to: Cantonese (Chinese), Spanish, and English. 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.

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 Department is satisfied that Grantee complies with City contracting requirements.

Grantee Selection

Grantee was selected through Request for Proposals (RFP) #628 on December 8, 2014.

Funding

Funding for this grant agreement will be provided by County funds, as well as CalFresh Eligibility Funds from the State and Federal Government.

Attachments

Appendix A, Scope of Services
Appendix B, Program Budget

Appendix A: Scope of Services to be Provided
211 San Diego
CalFresh Telephone Benefits Linkages
Effective March 1, 2017 through February 28, 2019

I. Purpose of Grant

The purpose of the grant is to reduce hunger and improve health in San Francisco by generating approvable CalFresh applications. While one out of four San Francisco residents struggles with food insecurity, only half -- roughly 50,000 -- are receiving CalFresh 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 program, CalFresh/Medi-Cal program, and CalFresh/Free School Meals program.

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 population is persons on Medi-Cal who are not receiving CalFresh benefits, and families receiving Free and Reduced School Meals who are not receiving CalFresh benefits.

IV. Description of Services

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

1. Procedure for initial calls to clients:

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

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.
- 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.

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. 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 assistants 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 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.

VI. 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 application follow-through.
- Service Objective 2: 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 3: 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 4: Grantee will build strong relationships with local CBOs to identify referral opportunities.
- Service Objective 5: Grantee will track and report benefits linkages data on a monthly basis to SFHSA. Grantee will record all calls and store them in a way that is easily retrievable.



VII. Outcome Objectives

- Outcome Objective 1: Grantee will generate a minimum of 1,800 approved CalFresh applications per contract term.

VIII. 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:

Drake.Herrador@sfgov.org
Contract Manager, Office of Contract Management
1650 Mission Street, Suite 300
San Francisco, CA 94103

or

Tiana.Wertheim@sfgov.org
Program Manager, Division of CalFresh
1235 Mission Street
San Francisco, CA 94103

IX. 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
1					Appendix B, Page 1
2					Document Date: 2/8/2017
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name:			Term:	
6	2-1-1 San Diego			3/1/2017 - 2/28/2019	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification _____				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: CalFresh Benefits Linkages				
10	Salaries & Benefits				
11	Program Term	3/1/17-2/28/18	3/1/18-2/28/19		Total
12	Expenditures				
13	Salaries & Benefits	\$163,418	\$163,418		\$326,836
14	Operating Expense	\$70,500	\$70,500		\$141,000
15	Subtotal	\$233,918	\$233,918		\$467,836
16	Indirect Percentage (%)	2%	2%		
17	Indirect Cost (Line 16 X Line 15)	\$4,678.00	\$4,678.00		\$9,356
18	Capital Expenditure	\$0	\$0		\$0
19	Total Expenditures	\$238,596	\$238,596		\$477,192
20	HSA Revenues				
21	General Fund	\$35,789	\$35,789		\$71,578
22	State	\$83,509	\$83,509		\$167,018
23	Federal	\$119,298	\$119,298		\$238,596
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$238,596	\$238,596		\$477,192
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues				
37	Full Time Equivalent (FTE)				
39	Prepared by: Brian Nolan	Telephone No.: (858) 300-1290			2/8/2017
40	HSA-CO Review Signature:	_____			
41	HSA #1				1/0/1900

9

	A	B	C	D	E	F	G	H	I
1									
2									
3									
4	Program Name: CalFresh Benefits Linkages						Appendix B, Page 2		
5	(Same as Line 9 on HSA #1)						Document Date:	2/8/2017	
6									
7									
8									
9									
10									
11									
		Agency Totals		For HSA Program		3/1/17-2/28/18	3/1/18-2/28/19		TOTAL
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	3/1/17 to 2/28/19
12	POSITION TITLE								
14	Enrollment Specialists (multiple)	\$34,000	1800%	350%	265%	\$90,234	\$90,234		\$180,468
15	Program Assistants (multiple)	\$36,000	200%	50%	50%	\$18,000	\$18,000		\$36,000
16	Program Supervisors (multiple)	\$50,000	300%	62%	30%	\$15,000	\$15,000		\$30,000
17	Director of Enrollment Services	\$90,000	100%	5%	5%	\$4,500	\$4,500		\$9,000
18	Contracts & Grants Compliance Mgr	\$60,000	100%	5%	5%	\$3,000	\$3,000		\$6,000
19									\$0
20									\$0
21									\$0
22									\$0
23									\$0
24									\$0
25									\$0
26									\$0
27	TOTALS		25.00	4.72	3.55	\$130,734	\$130,734	\$0	\$261,468
28									
29	FRINGE BENEFIT RATE	25.00%							
30	EMPLOYEE FRINGE BENEFITS					\$32,684	\$32,684	\$0	\$65,368
31									
32									
33	TOTAL SALARIES & BENEFITS	\$0				\$163,418	\$163,418	\$0	\$326,836
34	HSA #2								

10

	A	B	C	D	E	F	G	H	I	J	K
1											Appendix B, Page 3
2											Document Date: 2/8/2017
3											
4	Program Name: CalFresh Benefits Linkages										
5	(Same as Line 9 on HSA #1)										
6											
7	Operating Expense Detail										
8											
9											
10											
11											
12	<u>Expenditure Category</u>			TERM	<u>3/1/17-2/28/18</u>		<u>3/1/18-2/28/19</u>				TOTAL
13	Rental of Property				\$14,000		\$14,000				\$ 28,000.00
14	Utilities(Elec, Water, Gas, Phone)				\$9,000		\$9,000				\$ 18,000.00
15	Office Supplies, Postage				\$4,000		\$4,000				\$ 8,000.00
16	Building Maintenance Supplies and Repair				\$0		\$0				\$ -
17	Printing and Reproduction				\$0		\$0				\$ -
18	Insurance				\$0		\$0				\$ -
19	Staff Training				\$0		\$0				\$ -
20	Staff Travel-(Local & Out of Town)				\$3,000		\$3,000				\$ 6,000.00
21	Rental of Equipment				\$0		\$0				\$ -
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE										\$ -
23	Wu Yee Children's Services				\$40,500		\$40,500				\$ 81,000.00
24											\$ -
25											\$ -
26											\$ -
27											\$ -
28	OTHER										\$ -
29											\$ -
30											\$ -
31											\$ -
32											\$ -
33											\$ -
34											
35	TOTAL OPERATING EXPENSE				\$70,500		\$70,500		\$0		\$141,000
36											
37	HSA #3										

(11)