



London Breed, Mayor

Department of Human Services  
 Department of Aging and Adult Services  
 Office of Early Care and Education

Trent Rhorer, Executive Director

**MEMORANDUM**

**TO:** AGING & ADULT SERVICES COMMISSION

**THROUGH:** SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

**FROM:** CINDY KAUFFMAN, DEPUTY DIRECTOR  
 JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *Ju1*

**DATE:** FEBRUARY 15, 2019

**SUBJECT:** NEW CONTRACT: **RESOURCE DEVELOPMENT ASSOCIATES (FOR-PROFIT)** TO PROVIDE RESEARCH AND ANALYSIS CONSULTANT TO DEVELOP A RESOURCE DIRECTORY

**CONTRACT TERM:** 2/1/2019-9/30/2019

<b>CONTRACT AMOUNT:</b>	New	Contingency	Total
	\$49,915	\$4,992	\$54,907

**ANNUAL AMOUNT** FY 19/20  
 \$49,915

<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Other</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>			\$49,915	\$4,992	\$54,907
<b>PERCENTAGE:</b>			100%		

The Department of Aging and Adult Services (DAAS) requests authorization to enter into a contract with Resource Development Associates for the seven-month period of February 1, 2019 through September 30, 2019, in an amount of \$49,915 plus a 10% contingency for a total amount not to exceed \$54,907. The purpose of the contract is to provide research and analysis for the development of a dynamic Resource Directory which will include services for people with disabilities and older adults, including well individuals, those with serious illness and people with dementia.

## **Background**

DAAS coordinates services for older adults, veterans, and people with disabilities, and their support systems to maximize safety, health and independence. DAAS serves approximately 60,000 of the city's 250,000 older adults and adults with disabilities annually through a variety of programs including direct services as well as contracting with more than 60 community-based organizations.

A recently conducted community needs assessment indicated that older people, adults with disabilities, caregivers, and health care providers in San Francisco are often confused about how to access much-needed services. In addition, workgroups of San Francisco's Long Term Care Coordinating Council (LTCCC) have expressed the desire for a repository of information about these services. One solution is a comprehensive resource directory that would be available to all stakeholders. This directory would assist caregivers, provide valuable information to both social services and healthcare staff, serve as a resource to older adults and people with disabilities seeking assistance, help improve quality of care, and make the system of services more accessible to all who need them.

The Stupski Foundation and Hirsch and Associates have funded services for older adults and people with disabilities for some time. Stupski Foundation is committed to end of life efforts, and to developing community driven solutions that will foster innovations to end hunger and improve access to quality food for those in need. Hirsch and Associates strives to assist in public-private partnerships and high-impact initiatives, and have worked with issues related to disability and senior services. They both have a deep interest in the community and access to resources. A major concern has been the inability of consumers in need to have a central repository of information and resources. Both foundations are committed to working to address this void through funding of this initial research.

## **Services to be Provided**

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

- Coordination and facilitation of a project kickoff meeting with the DAAS project team.
- Best practices and benchmarking research to identify and refine potential strategies, practices, functionalities, and standards that will inform the development and design process of the resource directory.
- Outreach to key informant interview subjects and participants for user experience testing of potential technology solutions via interactive focus groups.
- Engagement of diverse stakeholders through key informant interviews to inform the prioritization of content and functionalities of the online directory.
- Analysis of data across a variety of sources that will inform a report to DAAS that includes findings, recommendations, a "Top 10" list for content inclusion in the directory and a "Top 10" list for functionality of the directory.
- Research and evaluation of resource directory development options and the creation of inventory of viable platform and website possibilities.
- Facilitation of user experience testing of the short list of viable platform and website options.

- Interviews with interested and qualified vendors and firms providing short-listed platform and website options.

Analysis of data collected from directory development assessment, interactive focus groups, and vendor interviews will inform a final report to DAAS and actionable recommendations therein.

**Selection**

Contractor was selected through Informal Bid #802, which was competitively bid in August 2018.

**Funding**

The grant is being 100% funded by both Stupski Foundation and Hirsch and Associates.

**ATTACHMENTS**

Appendix A, Services to be Provided

Appendix B, Budget and Project Timeline

Appendix B-1, Calculation of Charges

**Appendix A – Services to be Provided  
Resource Development Associates  
Research and Analysis Consultant to Develop a Resource Directory  
February 1, 2019 – September 30, 2019**

**I. Purpose of Contract**

The purpose of this contract is to engage a consultant to provide research and analysis for the development of a dynamic and comprehensive resource directory to include services for people with disabilities and older adults, including well individuals, those with serious illness and people with dementia.

Through the described project services and in conjunction with the DAAS project team, Contractor will aid in the facilitation of the development of an interactive resource directory of health and social services to improve the accessibility, coordination, and quality of care for older adults, veterans, people with disabilities, and their support systems in San Francisco. Contractor’s analysis of viable design options, based upon (but not limited to) factors such as best practice research, stakeholder feedback, and departmental implementation capacity, will facilitate DAAS in its decision-making related to the most appropriate and effective resource directory design and platform to increase access of support and health services for older adults and adults with disabilities.

**II. Definitions**

Adult with a Disability	A person 18 to 59 years of age living with a disability
CARBON	Contracts Administration, Reporting and Billing Online System
City	City and County of San Francisco, a municipal corporation
Contractor	Resource Development Associates (RDA)
HSA	Human Services Agency of the City and County of San Francisco
DAAS	Department of Aging and Adult Services of the San Francisco Human Services Agency
Disability	A condition or combination of conditions attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: Activities

of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.

OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years of age or older; used interchangeably with “senior.”
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)

### **III. Target Population**

The final product, a dynamic resource directory, will serve all residents of San Francisco that are seeking services or information regarding services for older adults and/or people with disabilities including those with the greatest economic and /or social need.

### **IV. Description of Services**

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

- Coordination and facilitation of a project kickoff meeting with the DAAS project team.
- Best practices and benchmarking research to identify and refine potential strategies, practices, functionalities, and standards that will inform the development and design process of the resource directory.
- Outreach to key informant interview subjects and participants for user experience testing of potential technology solutions via interactive focus groups.
- Engagement of diverse stakeholders through key informant interviews to inform the prioritization of content and functionalities of the online directory.
- Analysis of data across a variety of sources that will inform a report to DAAS that includes findings, recommendations, a prioritized list for content inclusion in the directory and a prioritized list for functionality of the directory.
- Research and evaluation of resource directory development options and the creation of inventory of viable platform and website possibilities.
- Facilitation of user experience testing of the short list of viable platform and website options.

- Interviews with interested and qualified vendors and firms providing short-listed platform and website options.
- Analysis of data collected from directory development assessment, interactive focus groups, and vendor interviews that informs a final report to DAAS and actionable recommendations therein.

**V. Location and Time of Services**

The bulk of Contractor’s work shall be performed at their office located at 2333 Harrison Street, Oakland, California 94612. When necessary, Contractor will work directly with staff, such as attending face-to-face meetings, at locations to be determined.

**VI. Deliverables**

By September 30, 2019, Contractor will meet the following service objectives:

<b>Project Services/Tasks</b>	<b>Deliverables</b>
<p><b>1.1 Document review:</b> Contractor will request and review relevant documents to inform understanding of the context of the project and to establish the foundation from which research efforts will launch. The document review will also assist the Contractor team in defining areas of focus and parameters for best practice research.</p> <p><b>1.2 Best practices research:</b> Contractor will conduct research of best practices in health care resource directories across the country. Contractor will examine published research in the field as well as publically available reports, with a goal of identifying best practices in defining “success” in similar projects. Contractor will assess the feasibility and suitability of utilizing and implementing the identified practices within DAAS’s contexts, taking into account service domains, target populations and needs, priorities, organizational capacity, and resources to be leveraged.</p> <p><b>1.3 Benchmarking:</b> Contractor will use the document review and best practices research to identify areas of inquiry for benchmarking research and explore other online health and social services directories</p>	<p><b>Findings memorandum to DAAS:</b> Contractor will provide DAAS with a findings memorandum to communicate and validate discovery research findings developed from the document review, best practices research, and benchmarking. This memorandum will support decision-making to inform the process in the next phase of the project.</p> <p>Dates to be Completed by:</p> <p>1.1 March 15, 2019</p> <p>1.2 March 15, 2019</p> <p>1.3 March 30, 2019</p>

to glean “typical” features, innovative and effective functions.	

Project Services/Tasks	Deliverables
<p><b>2.1 Outreach and engagement:</b> Contractor will work with DAAS to identify specific individuals to engage in data collection activities from a range of stakeholder groups, including but not limited to: Long-Term Care Coordinating Council and workgroups, DAAS Resource Hub, the Advisory Council, HSA Communications team, hospital discharge planners, Age &amp; Disability Friendly committee members, community-based organizations, DAAS service providers, service consumers and their families, other City and County departments, system administrators, Transforming Care Partners, and Hirsch and Associates.</p> <p><b>2.2 Key informant interviews (KIIs) (10):</b> Contractor will conduct up to 10 one-hour key informant interviews with the engaged stakeholders noted above to seek diverse perspectives on highest-need content and functionality for the service directory and their reasoning for such prioritization. Contractor will conduct interviews according to a structured protocol that will be developed with DAAS input and approval.</p> <p><b>2.3 Data analysis:</b> Contractor will analyze data across a variety of sources to highlight results that might not be realized from one source alone. Contractor will use data collected from the key informant interviews to deepen understanding of information acquired in Phase 1’s discovery process and identify prevalent themes, patterns, and implications.</p>	<p><b>Preliminary report:</b> Contractor will prepare a report that includes an overview of research methods, stakeholder engagement process, and findings as well as any resulting recommendations and/or implications to consider in subsequent project phases. Contractor will provide the report draft to DAAS for review and incorporate feedback prior to finalization. If desired by DAAS, Contractor can develop a PowerPoint presentation summary of the report and present key aspects of the report to any variety of stakeholders.</p> <p>Dates to be Completed by:</p> <p>2.1 March 15, 2019</p> <p>2.2 April 15, 2019</p> <p>2.3 May 15, 2019</p>

<b>Project Services and Tasks</b>	<b>Deliverables</b>
<p><b>3.1 Short list development:</b> Contractor will research and evaluate a number of resource directory development options based on functionality, cost, adaptability/custom tailoring options, required maintenance, architecture review, scalability, sustainability, and other identified priorities. Contractor will then develop a short list of interested and qualified candidates to explore further.</p> <p><b>3.2 Platform/website user experience testing (3):</b> Contractor will explore the short list of interested and qualified candidates through user experience testing of their platforms/websites. Three interactive focus groups will be held with a representative sample of the stakeholders. Contractor will aggregate data from all user experience testing groups to develop a list of feedback on each vendor’s potential solution, which will be utilized in upcoming interviews with each vendor.</p> <p><b>3.3 Vendor/firm interviews (3):</b> Contractor will engage the short list of interested and qualified vendors/firms in detailed discussions of DAAS’s prioritized needs, their ability to meet the identified core functionality needs, user feedback of their platform/website, the adaptability of their technology, their capacity and timeline to complete the project, proposed project cost, availability and cost for ongoing maintenance and updates, references from current clients, and other topics as needed.</p> <p><b>3.4 Data analysis:</b> Contractor will aggregate and analyze data collected from the initial assessment of directory development options, user experience</p>	<p><b>Final Report</b> Contractor will prepare a comprehensive written report summarizing research findings. Specific and actionable recommendations will be presented to inform resource directory development efforts, including development options/product types, specific vendors/firms, prioritized content, functional and technical priorities, and suggested timeline and budget ranges.</p> <p>Dates to be Completed by:</p> <p>3.1 June 30, 2019</p> <p>3.2 June 30, 2019</p> <p>3.3 July 15, 2019</p> <p>3.4 August 15, 2019</p>



<p>testing, and interviews to develop recommendations for DAAS to consider when choosing a developer of the online resource directory. This analysis will include an in-depth evaluation of DAAS expectations compared to each potential vendor's capacity, to ensure proposed solutions address DAAS's identified needs and that honor priorities voiced by the diverse stakeholders involved.</p>	
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**VII. Reporting Requirements**

- A. Contractor will provide a monthly report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Contractor will enter the monthly metrics in the CARBON database by the 15th of the following month.
- B. Contractor 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 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 the Department.
- D. Quarterly and Annual Reports will be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system.

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

Annyse.Acevedo@sfgov.org  
 Contract Manager, Office of Contract Management

or

Melissa.McGee@sfgov.org  
 Dignity Fund Manager, Department of Aging and Adult Services

**VIII. 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 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 – Budget and Project Timeline

RDA will provide the services described according to the cost proposal below. This distribution of staff and time allocation may be altered to adapt to emerging needs, however the project will not exceed the agreed-upon budget of \$49,915 without prior negotiation and authorization. RDA bills according to the following rates for the project team:

Team Role	Hourly Rate
Project Director	\$250/hr.
Senior Project Associate	\$200/hr.
Program Associate	\$165/hr.
Research Associate	\$135/hr.
Project Support Assistant	\$110/hr.

The cost proposal is inclusive of all personnel, fringe benefit, materials, travel, equipment, insurance, communications, indirect, facilities, and administrative costs that will be incurred over the course of the proposed project. RDA bills half of the travel time related to project activities, which is included in the cost proposal and total budget amount.

<i>Project Activities</i>	<i>Project Director/Sponsor</i> (\$250/hr.)	<i>Sr Program Associate</i> (\$200/hr.)	<i>Research Associate</i> (\$135/hr.)	<i>Total Hours</i>	<i>Total Cost</i>
<b><i>Phase 1: Project Launch and Discovery</i></b>					
Project kickoff meeting	2	2.5	5	9.5	\$1,675
Document review	0	1.5	4	5.5	\$840
Best practices research	0	2	12	14	\$2,020
Benchmarking	0	3	10	13	\$1,950
<b><i>Phase 2: Prioritization of Content and Functionality</i></b>					
Outreach and engagement	1	3	6	10	\$1,660
Key informant interviews (10)	0	10	15	25	\$4,025
Data analysis	0	4	8	12	\$1,880
Key Deliverable: Preliminary Report	2	12	32	46	\$7,220
<b><i>Phase 3: Identification and Evaluation of Solutions</i></b>					
Short list development	1	8	14	23	\$3,740
Platform/website user experience testing (3)	1	13.5	16	30.5	\$5,110
Vendor/firm interviews (3)	3	5.5	9	17.5	\$3,065
Data analysis	2	8	12	22	\$3,720
Key Deliverable: Final Report	4	18	36	58	\$9,460

<i>Ongoing: Project Management and Communications</i>					
Project management	1	7	0	8	\$1,650
Communication	2	7	0	9	\$1,900
<b>Grand Total</b>	<b>19</b>	<b>105</b>	<b>179</b>	<b>303</b>	<b>\$49,915</b>

### Project Timeline

Activities	Feb	Mar	Apr	May	Jun	Jul	Aug
<b>Phase 1: Project Launch and Discovery</b>							
Project kickoff meeting	■						
Document review	■	■					
Best practices research	■	■					
Benchmarking	■	■					
<b>Phase 2: Prioritization of Content and Functionality</b>							
Outreach and engagement	■	■					
Key informant interviews		■	■				
Data analysis			■	■			
<i>Key Deliverable: Preliminary Report</i>				■			
<b>Phase 3: Identification and Evaluation of Solutions</b>							
Short list development				■	■		
Platform/website user experience testing				■	■		
Vendor/firm interviews						■	■
Data analysis						■	■
<i>Key Deliverable: Final Report</i>						■	■
<b>Ongoing: Project Management and Communications</b>							
Project management	■	■	■	■	■	■	■
Communication	■	■	■	■	■	■	■

**Appendix B-1 – Calculation of Charges**  
**Resource Development Associates**  
**Research and Analysis Consultant to Develop a Resource Directory**  
*Effective February 1, 2019 – September 30, 2019*

**I.** The contract term for Research and Analysis Consultant to Develop a Resource Directory under this Agreement will begin effective February 1, 2019 and end September 30, 2019.

**II.** Contractor will be compensated on an hourly basis in accordance with the terms of the agreement and the project timeline and budget specified in Appendix B, at the hourly rates for each individual participating in the project as specified in Appendix B, for an approximate total of 303 hours during the term of the Agreement.

Total contract amount for the period of February 1, 2019 through September 30, 2019 is not to exceed **\$54,907**.

**III.** Contractor shall submit invoices upon completion of task/deliverable outlined in Appendix A, Section VI. Invoices shall document the number of hours spent on the associated deliverable/task as outlined in Appendix A, and any additional work outside of the deliverable/task authorized in writing by HSA staff or management. The Contractor further understands that payment will be made only upon HSA staff and/or management confirmation of completion of each deliverable/task and will cover only those costs specifically associated with completion of that task/deliverable.

**IV.** Contractor understands that, of the maximum dollar obligation listed in Section 4 of this Agreement, **Four Thousand, Nine Hundred Ninety Two Dollars (\$4,992)** is included as a contingency amount and is neither to be used in the Program Budget, nor available to Contractor without a modification to this Agreement executed in the same manner as this Agreement or a revision to the Program Budget of Appendix B, which has been approved by Contract Manager. 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 Human Services Agency 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.

**V.** A final closing invoice, clearly marked “FINAL,” shall be submitted no later than forty-five (45) calendar days following the closing date of the Agreement, and shall include only those Services rendered during the referenced period of performance. If Services are not invoiced during this period, all unexpended funding set aside for this Agreement will revert to City. City’s final reimbursement to the Contractor at the close of the Agreement period shall not exceed the total amount authorized and certified for this Agreement.