



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

P.O. Box 7988
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London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DATE: FEBRUARY 2, 2022

SUBJECT: NEW CONTRACT: COREY, CANAPARY & GALANIS
(FOR PROFIT) TO PROVIDE HOUSING NEEDS
ASSESSMENT CONSULTANT SERVICES

DS
EL

CONTRACT TERM: 2/1/2022 - 8/31/2022

CONTRACT AMOUNT:	<u>New</u> \$150,000	<u>Contingency</u> \$15,000	<u>Total</u> \$165,000
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Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$ 112,500		\$37,500	\$ 15,000	\$165,000
PERCENTAGE:	75%		25%		100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into a new contract with Corey, Canapary & Galanis for the period of February 1, 2022 to August 31, 2022, in an amount of \$150,000 plus a 10% contingency for a total amount not to exceed \$165,000. The purpose of the contract is to provide consultant services to conduct Stakeholder Engagement for the 2022 Aging and Disability Affordable Housing Needs Assessment. This assessment will review current housing needs, identify equity concerns and service gaps, and develop recommendations to address these issues.

Background

SFHSA's Department of Disability and Aging Services (DAS) plans and administers a variety of federal, state and local programs to assist older adults, veterans, and people with disabilities and their families to maximize safety, health, and independence. DAS directly provides and partners with dozens of community-based organizations to offer services that support these populations to safely live and engage in the community for as long as possible and maintain the highest quality of life.

In December 2020, the San Francisco Board of Supervisors adopted legislation to implement new reporting on affordable housing for older adults and people with disabilities. Under this legislation, the Department of Disability and Aging Services is tasked with facilitating two new reports, an Aging and Disability Affordable Housing Needs Assessment and Production Pipeline Report (the Housing Needs Assessment Report).

DAS will prepare and publish the Housing Need Assessment Report for the first time by October 2022. The Housing Needs Assessment Report will help staff, commissioners, and elected officials understand current housing needs, identify equity concerns and service gaps, and develop recommendations to address these issues.

Services To Be Provided

This contract is to conduct Stakeholder and Community Engagement, which is one critical component of the Housing Needs Assessment Report that will provide an opportunity for clients, community members, and service providers to give input on senior and disability housing needs and service gaps. Insights collected through this process will be incorporated into the needs assessment to inform reporting on City-funded housing services and programs.

For more specific detail regarding services to be provided, please refer to Appendix A (attached).

Selection

On February 6, 2020, the Controller's Office created an extension of a prequalified list of vendors with demonstrated successful experience in 5 Service Areas: Service Area 1 - Stakeholder Outreach Services; Service Area 2 - Stakeholder Engagement Services; Service Area 3 - Stakeholder Facilitation; Service Area 4 - Biennial City Survey; and Service Area 5 - Miscellaneous Data Collection. Contractor was selected through the highest available ranked firm among the Office of Controller's prequalified list of vendors with demonstrated successful experience in Stakeholder Engagement Services.

Funding

Funding is provided through a combination of Federal and County General Funds.

ATTACHMENTS

Appendix A, Scope of Services
Appendix B, Budget

**APPENDIX A –SERVICES TO BE PROVIDED BY GRANTEE
Corey, Canapary & Galanis Research (CC&G)
Aging and Disability Affordable Housing Needs Assessment
February 1, 2022 – August 31, 2022**

I. Purpose

The purpose of this contract is to provide consultant services to conduct Stakeholder and Community Engagement for the 2022 Affordable Housing Needs Assessment.

II. Background

In December 2020, the San Francisco Board of Supervisors adopted legislation to implement new reporting on affordable housing for older adults and people with disabilities. Ordinance 266-20 amends the Administrative Code to require new reporting on housing needs and affordable housing production for seniors and people with disabilities; under this legislation, the Department of Disability and Aging Services is tasked with facilitating two new reports, one of which is an Aging and Disability Affordable Housing Needs Assessment and Production Pipeline Report (the Housing Needs Assessment Report).

DAS will prepare and publish the Housing Needs Assessment Report for the first time by October 2022, as outlined in Ordinance 266-20. The Housing Needs Assessment Report will help staff, commissioners, and elected officials understand current housing needs, identify equity concerns and service gaps, and develop recommendations to address these issues.

The Stakeholder and Community Engagement component of the Housing Needs Assessment Report will provide an opportunity for clients, community members, and service providers to give input on senior and disability housing needs and service gaps. Insights collected through this process will be incorporated into the needs assessment to inform reporting on City-funded housing services and programs.

III. Definitions

CARBON:	Contracts Administration Reporting & Billing Online database
CC&G:	Corey, Canapary & Galanis Research (CC&G)
CITY:	City and County of San Francisco, a municipal corporation
CONTRACTOR:	Corey, Canapary & Galanis Research (CC&G)
DAS:	San Francisco Department of Disability and Aging Services

IV. Target Population

All residents of San Francisco that are seniors aged 60 or older and individuals ages 18-59 with a disability(ies) with a primary focus on those who are eligible for or need affordable housing programs or services, including those with the greatest economic and / or social need.

V. Description of Services

Contractor shall complete the Housing Needs Assessment Stakeholder Engagement process through a seven-pronged scope of work to ensure it is built upon a foundation of robust community research and completed on time and within budget.

1. Project Planning and Management

CC&G will develop an implementation plan to gather and analyze community feedback on City-funded affordable housing programs. CC&G will work with DAS to ensure inclusion of a diverse group of individuals and stakeholders in this research work. DAS will be relied upon to coordinate contact information and provide names/introductions of key personnel who will assist CC&G in building the list of residents and key stakeholders who should be included in both the survey and focus group efforts.

The project management component outlined in DAS' original scope will be built into each of the individual components listed below.

2. Qualitative In-Depth Interviews

- a. Eighty (80) in-depth qualitative interviews with a diverse group of older adults and adults with disabilities who live in San Francisco.
- b. The interviews will focus on specific needs and barriers related to affordable housing in San Francisco.
- c. Most of the interviews will be conducted by phone, with some interviews conducted in-person, as needed.
- d. The interview will be designed to be completed in 15 minutes. However, some respondents will take longer than this and CC&G surveyors will conduct the interview at a pace that is comfortable for the respondent being interviewed. This means interviews will continue beyond 15 minutes whenever necessary.
- e. Interviews will be conducted in English, Spanish and Chinese
- f. DAS and its partner agencies will provide CC&G with contact names/phone #s/etc. to use for conducting these interviews.

3. Focus Groups

a. Six (6) Focus Group Sessions

- Three (3) group key informant sessions with providers and community advocates (virtual).
- Two (2) focus groups with residents in affordable housing sites that are collocated within the same housing development (in person or virtual, pending Covid).
- One (1) focus group with respondents who are deaf or hard of hearing (in person or virtual, pending Covid).
- Each session/group will include up to six (6) participants. This is the preferred number of participants for virtual group sessions; if the sessions are in-person we may expand this number to 7-8 participants.
- Each session/group will be scheduled for 60-75 minutes.
- The topic guide will be prepared in advance with input/feedback from DAS.
- Groups will be audio recorded and transcripts will be included in the project's final documentation. Groups will be conducted in English.
- DAS and its partner agencies will provide CC&G with contact names/phone #s/emails to use for recruiting participants. CC&G will contact and schedule participants.

b. Community Forum Research Materials

- CC&G will design research material for up to four (4) community forums coordinated by DAS. It is anticipated that the research material developed for these forums will be similar to other materials being developed for other components of this project.
- CC&G will integrate findings from the community forum research into the final report on this project.

4. Key Informant Interviews

Key informant interviews will be conducted with service providers, community advocate and/or policy leaders. Some key informant members will already be included in the group session effort outlined above. However, these one-on-one informant interviews will provide an opportunity to include feedback from others who would not be willing, or able, to participate in group research sessions.

- a. Approximately ten (10) key informant interviews will be conducted
- b. The length of each interview will be up to 20 minutes.
- c. Most of the interviews will be conducted virtually or by phone, with some interviews conducted in-person, as needed.
- d. DAS and its partner agencies will provide CC&G e-introductions, as well as contact names/phone #s/emails, to use for conducting these interviews. DAS' direct involvement in contacting potential respondents will be particularly important in this effort.

5. Population Survey

The population survey will be conducted with a broad cross section individuals living in San Francisco for whom the affordable housing programs and services have been developed. This includes older people, adults with disabilities, veterans, services providers, and others.

- a. Approximately 475+ surveys will be completed. This will provide a margin of error of +/- 4.5% at the 95% confidence level.
- b. The survey will be available in multiple formats, online, paper, as well as programmed for phone interviewing by CC&G staff.
- c. The survey will be offered in different settings, and using different approaches, in order to ensure broad and diverse participation. It is anticipated that DAS and its partner agencies will distribute the paper survey themselves during in-person meetings/events. Additionally, the online survey will be programmed by CC&G and the link will be made available to different agencies or individuals as directed by DAS. Finally, CC&G will plan to conduct the survey directly by phone using a hybrid list of contacts; the phone effort will be effective for many who might otherwise be reluctant to participate online or in-person (e.g. paper survey).
- d. The survey will be available in English, Spanish, Chinese for completion by phone, online or on the paper version of the survey. In addition, the survey will be

available in Russian, Vietnamese and Tagalog for completion online and on the paper version of the survey.

- e. The questionnaire will be designed to be completed in less than 10 minutes. Some surveys will go longer than that depending on the respondent's pace.
- f. CC&G will handle translation and printing of the paper surveys. CC&G will also program the online survey.
- g. We will use a hybrid approach in developing the phone contact list for the population survey. A primary list will be provided by DAS and its partners to CC&G with contact names and phone numbers. This list will ensure inclusion of a broad cross-section of adults who have involvement or are familiar with affordable housing programs and services in San Francisco. We anticipated completing approximately 70% of surveys using this primary list. Additionally, CC&G will obtain a secondary list of adults in San Francisco who meet the survey criteria (e.g. older people, adults with disabilities, veterans, etc.). This will ensure inclusion of others who may not be as familiar with San Francisco's affordable housing programs/services but who can provide important feedback and perspectives related to their own circumstances.

6. Data Analysis

Based on research activities, the consultant will manage data analysis to analyze stakeholder input. The consultant will compile and transmit data into usable formats, develop and execute data analysis using quantitative and qualitative methods, and create data analysis reports including a summary report of community research findings. This result of the data analysis will include cross-tabulated tables for the survey research efforts and transcripts for the focus groups.

7. Report Drafting

The consultant will synthesize their findings in a summary report. The consultant will present this report to DAS/HSA for review and comment. Report content must be provided with at least two weeks for DAS to review and prepare feedback. The consultant will incorporate feedback from the Department and stakeholder bodies.

VI. Location and Time of Services

The bulk of Contractor's work shall be done at their offices, located at 447 Sutter St #9, San Francisco, CA 94108. When necessary, Contractor will work directly with staff, such as attending face-to-face meetings, at locations to be determined.

VII. Reporting Requirements

Contractor shall submit reports on the schedule detailed in Section V

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

Tim.Vo@sfgov.org
Contract Manager, Office of Contract Management

Isabel.Clayter@sfgov.org
Senior Administrative Analyst, Planning Unit

Appendix B – Calculation of Charges
Corey, Canapary & Galanis Research (CC&G)
Aging and Disability Affordable Housing Needs Assessment
Effective February 1, 2022 – August 31, 2022

- I. The contract term for the Dignity Fund Comprehensive Community Needs Assessment under this Agreement will begin effective February 1, 2022 and end August 31, 2022.
- II. Total contract amount for the period of February 1, 2022 through August 31, 2022 in an amount of \$150,000 plus a 10% contingency for a total amount not to exceed \$165,000.
- III. Contractor shall submit invoices upon completion of each project deliverable component as outlined in Appendix A, Section V.

	Deliverables for Invoicing and Budget	Invoice Amount
1.1	Project Plan and Detailed Methodology	\$ 8,750
Task 1 Budget		\$ 8,750
2.1	Final Questionnaire: Qualitative In Depth Interviews	\$10,950
2.2	Completion Memo: Qualitative In Depth Interviews	\$10,950
Task 2 Budget		\$21,899
3.1	Final Topic Guide: Focus Groups	\$13,970
3.1	Completion Memo: Focus Groups	\$13,970
Task 3 Budget		\$27,940
4.1	Final Questionnaire: Key Informant Interviews	\$2,924
4.1	Completion Memo: Key Informant Interviews	\$2,924
Task 4 Budget		\$5,847
5.1	Final Questionnaire: Population Survey	\$25,775
5.2	Completion Memo: Population Survey	\$25,775
Task 5 Budget		\$51,550
6.1	Survey Data Review Completion Memo: Data Analysis	\$9,900
6.2	Transcripts from Focus Groups: Data Analysis	\$9,900
Task 6 Budget		\$19,800
7.1	Draft Management Report	\$7,162
7.2	Final Management Report	\$7,162
Task 7 Budget		\$14,105
Total		\$150,000

- IV. Contractor understands that, of the maximum dollar obligation listed in Article 3 of this Agreement, **Fifteen Thousand Dollars (\$15,000)** 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 Budgets 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.