

File No. 121167

Committee Item No. 1

Board Item No. 5

# COMMITTEE/BOARD OF SUPERVISORS

## AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance

Date January 9, 2013

Board of Supervisors Meeting

Date January 15, 2013

### Cmte Board

- |                                     |                                     |  |
|-------------------------------------|-------------------------------------|--|
| <input type="checkbox"/>            | <input type="checkbox"/>            | Motion                                       |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Resolution                                   |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Ordinance                                    |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Legislative Digest                           |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Budget and Legislative Analyst Report        |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Legislative Analyst Report                   |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Youth Commission Report                      |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Introduction Form                            |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/>            | <input type="checkbox"/>            | MOU  |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Grant Information Form                       |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Grant Budget                                 |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Subcontract Budget                           |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Contract/Agreement                           |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Form 126 – Ethics Commission                 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Award Letter                                 |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Application                                  |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Public Correspondence                        |

**OTHER** (Use back side if additional space is needed)

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Completed by: Alisa Miller Date January 4, 2013  
 Completed by: Alisa Miller Date January 10, 2013

An asterisked item represents the cover sheet to a document that exceeds 25 pages. The complete document can be found in the file.

1 [Accept and Expend Grant - Code for America Labs, Inc. - \$105,000]  
2

3 **Resolution authorizing the San Francisco Department of Human Services to**  
4 **retroactively accept and expend a grant in the amount of \$105,000 from Code for**  
5 **America Labs, Inc., toward the cost of participating in the 2013 Code for America (CfA)**  
6 **Fellowship Program, which has specially selected the Department of Human Services**  
7 **to receive technology design services from CfA to increase access to public benefits**  
8 **by the City's lowest income residents.**  
9

10 WHEREAS, Code for America Labs (CfA) has selected the City, through its  
11 Department of Human Services, in a competitive award process to participate in the 2013 CfA  
12 Fellowship Program; and

13 WHEREAS, CfA Fellows are experts in web technology and dedicated to  
14 creating innovative, code-based technology solutions to civic problems; and

15 WHEREAS, Under the 2013 CfA Fellowship Program, CfA will develop a web-  
16 based technology solution to increase the ability of the lowest income San Franciscans to  
17 access public benefits; and

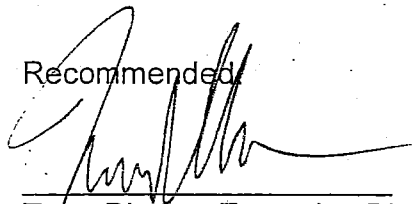
18 WHEREAS, CfA has further awarded the City a grant in the amount of \$105,000  
19 toward the full cost of its participation, to which the Department of Human Services and  
20 Department of Information Technology will jointly contribute a \$255,000 match; and

21 WHEREAS, The Department of Human Services proposes to maximize the use  
22 of available grant funds on program expenditures by not including indirect costs in the grant  
23 budget; now, therefore, be it  
24  
25

1 RESOLVED, That the Board of Supervisors hereby waives inclusion of indirect costs in  
2 the grant budget; and be it


3 FURTHER RESOLVED, That the Executive Director of the Department of Human  
4 Services or his designee is authorized to execute any and all agreements or other documents  
5 and to take any other steps as necessary to accept and expend the grant funds and  
6 participate in the 2013 CfA Fellowship Program.

7  
8 Recommended:

9 

10 Trent Rhorer, Executive Director  
11 Human Services Agency

12  
13  
14 Approved:

15   
16 Edwin M. Lee, Mayor

17  
18   
19 Ben Rosenfield, Controller  
20 *For*


CITY AND COUNTY OF SAN FRANCISCO

BOARD OF SUPERVISORS

BUDGET AND LEGISLATIVE ANALYST

1390 Market Street, Suite 1150, San Francisco, CA 94102 (415) 552-9292  
FAX (415) 252-0461

January 4, 2013

TO: Budget and Finance Committee   
FROM: Budget and Legislative Analyst  
SUBJECT: January 9, 2013 Budget and Finance Committee Meeting

**TABLE OF CONTENTS**

Item	File	Page
1	12-1167 Accept and Expend Grant – Code for America Labs, Inc. - \$105,000 .....	1-1
5	12-1139 Lease and Use Agreement – China Airlines, Limited .....	5-1
6	12-1170 Real Property Lease Amendment – Autodesk, Inc. – Pier 9.....	6-1
7	12-1169 Contract Amendment – Aon Insurance Services West, Inc. – Central Subway Project – Not to Exceed \$8,280,000.....	7-1

**Item 1**  
**File 12-1167**

**Department:**  
Human Services Agency (HSA)  
Department of Technology (DT)

## EXECUTIVE SUMMARY

### Legislative Objective

- Resolution authorizing the Human Services Agency to retroactively accept and expend a \$105,000 grant from Code for America Labs, Inc., a nonprofit organization, toward the cost of participating in the 2013 Code for America Fellowship Program, which has selected HSA to receive technology design services from Code for America to increase access to public benefits by the City's lowest income residents.

### Key Points

- Under the proposed 15-month grant, three individuals selected as fellows for Code for America would be assigned to San Francisco to research and develop technology-based solutions for improved access to public assistance benefits for HSA clients. Under the terms of the proposed grant agreement between the City and Code for America, the proposed Fellowship Program would be for a total of \$360,000, including \$105,000 from Code for America Labs, Inc. and \$255,000 of required City matching funds from HSA and the Department of Technology (DT).

### Fiscal Impacts

- The proposed \$105,000 Code for America grant would provide 29% of the total \$360,000 Code for America Fellowship Program, and the City would provide the balance of the \$255,000 or 71% of matching funds with (a) \$75,000 of General Fund revenues from HSA's FY 2012-13 budget and (b) \$180,000 of workordered revenues from DT's FY 2012-13 budget.
- The proposed resolution requests that the Board of Supervisors waive the inclusion of indirect costs (the City's costs to administer the grant), which are estimated at approximately 12 percent or \$12,600, which would be absorbed by HSA and DT, in order to maximize the use of available grant funds on program expenditures.
- Although specific savings cannot be calculated at this time, this project has the potential to generate workload efficiencies at HSA due to (a) a reduction in caseload churning and (b) the use of technology to facilitate client outreach and communication. However, such efficiencies and cost savings may be partially offset by future ongoing operating expenditures required to sustain the technology solutions developed as part of this project.

### Recommendation

- Approval of the proposed resolution is a policy decision for the Board of Supervisors as outlined in the Policy Consideration section below.

**MANDATE STATEMENT / BACKGROUND****Mandate Statement**

Administrative Code Section 10.170-1 provides that the acceptance and expenditure of federal, state or other grants of \$100,000 or more are subject to approval by resolution of the Board of Supervisors.

**Background**

Code for America Labs, Inc. is a nonprofit organization, often referred to as the “peace corps for geeks”, which is dedicated to helping governments work better for everyone through people and the power of the web. As part of Code for America Labs Fellowship Program, Code for America Labs recruits individuals who (a) are experts in web technology, (b) can dedicate a year to public service, and (c) are interested in creating innovative technology solutions to civic problems. These individuals are then matched with applicant cities that (a) demonstrate strong leadership to overcome bureaucratic obstacles, (b) have identified real cost-saving projects, (c) can provide funding to support the project, (d) promote transparency, and (e) provide community participation.

The City of San Francisco, through the Mayor’s Office, the Human Services Agency, and the Department of Technology applied and was selected through a competitive process to participate in the 2013 Code for America Labs Fellowship Program.

**DETAILS OF PROPOSED LEGISLATION**

The proposed resolution would authorize the Human Services Agency to retroactively accept and expend a grant for \$105,000 from Code for America Labs, Inc. toward the cost of participating in the 2013 Code for America Fellowship Program, which has selected HSA to receive technology design services from Code for America to increase access to public assistance benefits by the City’s lowest income residents. Under this grant, three individuals selected as fellows for Code for America would be assigned to San Francisco to research and develop technology-based solutions for improving access to public assistance for recipients of HSA benefits and services, such as the homeless, MediCal recipients and CalFresh<sup>1</sup> clients.

According to Mr. David Curto, Director of Contracts for HSA, the working problem posed to Code for America, that would be addressed under the proposed grant, is that (a) not all San Franciscans that are eligible for public assistance benefits are enrolled, and (b) those San Franciscans that are enrolled frequently “churn” on and off of HSA public benefit caseloads, creating significant workload inefficiencies for HSA and service gaps for clients. Under the proposed grant, the Code for America fellows would research, identify and develop strategies that facilitate the cross-enrollment of HSA clients who are participating in one set of HSA

<sup>1</sup> CalFresh is the name for the Food Stamps Program.  
SAN FRANCISCO BOARD OF SUPERVISORS

services into other HSA services for which those clients may be eligible. Mr. Curto advises that the specific technology solutions to these problems are yet to be determined, but the applications developed would potentially be for use by HSA staff, community-based service providers and/or current and prospective clients.

The term of the subject grant is 15 months, retroactive from October 1, 2012 through December 31, 2013. Under the terms of the proposed grant agreement between the City and Code for America, the proposed Fellowship Program would be for a total of \$360,000, including \$105,000 from Code for America Labs, Inc. and \$255,000 of required City matching funds from HSA and the Department of Technology.

Under this grant, the three fellows would receive an initial one-month intensive training from Code for America support staff working with City staff in government, industry and technology, including the specific issues affecting San Francisco, HSA and the specific clients to be served. This one-month training period is anticipated to occur in January of 2013. During February, the three fellows would conduct interviews with City staff and HSA clients to gain a better understanding of the specific problems and issues. During the remainder of the 15-month grant period, the three fellows would research potential solutions and then focus their attention on developing and implementing specific web-based applications for this project. During the last two months, the three fellows would develop plans to sustain their solutions on an ongoing basis.

## FISCAL IMPACTS

As shown in Table 1 below, the proposed \$105,000 Code for America grant would provide 29% of the total \$360,000 Code for America Fellowship Program funds. As also reflected in Table 1 below, the City would provide the balance of the \$255,000 or 71% of matching funds with (a) \$75,000 of General Fund revenues from HSA's FY 2012-13 budget and (b) \$180,000 of revenues allocated to DT's FY 2012-13 budget through workorders from other City departments. According to Mr. Ken Bukowski, Chief Financial Officer for the Department of Technology, approximately 70% or approximately \$126,000 of the total \$180,000 workordered funds are General Fund revenues. Therefore, the City's matching funds include approximately \$201,000 (\$75,000 + \$126,000) of General Fund revenues.

**Table 1: Funding Sources for \$360,000 Code for America Fellowship Program**

Funding Sources	Amount	Percentage
HSA General Fund	\$75,000	21%
DT Workordered Funds	180,000	50%
<b>Subtotal</b>	<b>\$255,000</b>	<b>71%</b>
Code for America Grant	\$105,000	29%
<b>Total</b>	<b>\$360,000</b>	<b>100%</b>

According to Mr. Curto, the \$75,000 included in HSA's FY 2012-13 budget, as previously approved by the Board of Supervisors, is a general line item included for information technology and software programming purposes to support agency operations, which is the intent of the subject grant. According to Mr. Bukowski, the \$180,000 included in DT's FY 2012-13 budget, as previously approved by the Board of Supervisors, was originally budgeted for various innovation projects, with the expectation that the City might receive this Code for America grant.

As shown in Table 2 below, most of the \$360,000 project costs would pay for salaries and benefits for the three Code for America Fellows and Code for America support staff. The overall budget also includes \$56,000 to cover office space and equipment at Code for America headquarters, located at 155 9th Street, where the three fellows will spend significant time during the grant period. In addition, Mr. Curto advises that the three Code for America Fellows would have office space in HSA's existing offices at 1650 Mission Street.

**Table 2: Projected Expenditures for \$360,000 Code for America Fellowship Program**

<b>Expenses</b>	<b>Amount</b>
Salaries, Benefits, & Taxes for 3 Code for America Fellows	\$158,000
Salary Support for Code for America Program Director, Coordinator & Technical Staff	110,000
Housing and Travel	18,000
Fellowship Training	6,500
Workspace/Office, Internet, Software, etc	56,000
Hardware Costs	3,500
Outreach, Communications, Technology Partnerships	8,000
<b>Total</b>	<b>\$360,000</b>

The proposed resolution requests that the Board of Supervisors waive the inclusion of indirect costs (the City's costs to administer the grant) in the grant budget, in order for HSA to maximize the use of available grant funds on program expenditures. Mr. Curto estimates indirect costs for the subject \$105,000 grant would be approximately 12 percent, or \$12,600, which would be absorbed by HSA and DT. Under the proposed grant agreement, the City will designate 5%-10% of HSA's and DT's staff's time to assist the three Fellows throughout the year.

Mr. Curto advises that, although specific savings cannot be calculated at this time, this project has the potential to generate efficiencies and potential cost savings to the City, including workload efficiencies at HSA due to (a) a reduction in caseload churning and (b) the use of technology to facilitate client outreach and communication.

Mr. Curto acknowledges that such efficiencies and cost savings may be partially offset by future ongoing operating expenditures required to sustain the technology solutions developed as part of



this project. However, Mr. Curto reports that the specific costs of maintaining future technology solutions, while unknown at this time, are anticipated to be primarily covered by using existing HSA information technology staff. According to Mr. Curto, Code for America develops applications using open source technology<sup>2</sup> and that one or more of HSA's information technology staff will be trained by the Code for America fellows in the use of such open source technology in order to be able to maintain such technology solutions in the future.

Mr. Curto notes that, although he was not able to provide specific calculations, Code for America estimates that if the City were to contract with a private vendor for the services that will be received under the proposed \$360,000 grant project, the market value would be worth approximately \$900,000.

### **POLICY CONSIDERATION**

Under the proposed resolution, the City would receive \$105,000 of grant funds from Code for America to undertake a \$360,000 2013 Code for America Fellowship Program for the subject 15-month period ending December 31, 2013. However, in order to receive such grant funds under the proposed resolution, the City would (a) be required to contribute \$255,000 (see Table 1 above) to this Program, including approximately \$201,000 of General Fund revenues, and (b) waive the inclusion of indirect costs (the City's costs to administer the grant) which are estimated at \$12,600, which would be absorbed by HSA and DT. In addition, the potential workload efficiencies and cost savings to HSA from the proposed technologies to be developed as well as any potential additional operating expenditures to be incurred in the future cannot be estimated at this time. Therefore, approval of the proposed resolution is a policy decision for the Board of Supervisors.

### **RECOMMENDATION**

Approval of the proposed resolution is a policy decision for the Board of Supervisors.

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<sup>2</sup> Open source technology generally refers to technology which is available to the general public free of charge for use and/or modification from its original design.



Edwin M. Lee, Mayor

Trent Rhorer, Executive Director

**MEMORANDUM**

TO: HUMAN SERVICES COMMISSION

THROUGH: TRENT RHORER, EXECUTIVE DIRECTOR

FROM: STEVE ARCELONA, DEPUTY DIRECTOR  
DAVID CURTO, DIRECTOR OF CONTRACTS

DATE: OCTOBER 19, 2012

SUBJECT: NEW GRANT: **CODE FOR AMERICA LABS INC.** (NON-PROFIT) FOR PROVISION OF TECHNOLOGY BASED SOLUTIONS FOR ACCESS TO BENEFITS

CONTRACT TERM: OCTOBER 1, 2012 - DECEMBER 31, 2013

CONTRACT AMOUNT: \$ 360,000

ANNUAL AMOUNT: FY 12-13  
\$ 360,000

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Code For America</u>	<u>Total</u>
FUNDING:	\$255,000			\$105,000	\$360,000
PERCENTAGE:	71%			29%	100%

The Department of Human Services (DHS) requests authorization to enter into a new grant agreement with Code For America Inc. for the period of October 1, 2012 through December 31, 2013, in an amount not to exceed \$ 360,000. The purpose of this grant is to participate in a competitive fellowship program awarded by Code for America to DHS to research and develop technology based solution(s) for improved access to benefits for Homeless, MediCal and CalFresh clients.

**Background**

Code for America (CfA) is a new non-profit organization with an innovative model and mission. Beginning in 2011, CfA has brought together web experts, civic leaders, and members of the technology industry to form a network of individuals who believe there is a better way of doing

things. CfA refers to themselves as the “peace corps for geeks”. CfA helps governments become more connected, lean, and participatory through new opportunities for public service both inside and outside of government. Through a collaborative effort with the Mayor’s office, Department of Technology and DHS, San Francisco applied to become a participant in the 2013 Fellowship program and was accepted into this very prestigious program. This is the first time CfA will be targeting solutions specifically for clients served by our department.

### **Services to be Provided**

Code for America is providing a cash contribution of \$105,000 to this project in addition to the \$255,000 the Departments are contributing. The market value of this specialized service is estimated to be in the \$900,000 range if purchased in the private sector.

During the grant term CfA will host a team of three “fellows” to work closely with our staff to understand the needs and challenges for access to benefits and create web based solutions to address them.

#### Selection, Recruitment, Training

Fellows are selected from a pool of passionate individuals with skills in technology, design, and management. Fellow selection is highly competitive. Applicants are evaluated by a selection committee composed of CfA staff, and industry and government leaders. Fellows will participate in a one-month intensive training experience covering relevant topics associated with government, industry and technology including an immersion into specific issues affecting San Francisco and DHS. Training continues throughout the year.

#### Residency

Over the course of the Program, Fellows will conduct interviews with our staff and clients and continue research to form and drive solutions. They will focus on developing applications that drive engagement, transparency and efficiencies targeted for this project.

#### “Wrap up and Hand-off”

The last two months of the program are dedicated to wrapping up the program and ensuring DHS has a plan to sustain the solution(s) and continue collaboration going forward. The program ends formally in December 2013.

### **Selection**

Award of fellowship participation grant by Code for America to the San Francisco Human Services Agency.

### **Funding**

Funding for this grant is provided by the City and County General Fund (71%); \$75,000 from DHS and \$180,000 via work order from the Department of Technology. Funding will also be provided through a \$105,000 contribution from Code for America (29%).

TO: Angela Calvillo, Clerk of the Board of Supervisors

FROM: DAVE CURTO

DATE: 11-16-12

SUBJECT: Accept and Expend Resolution for Subject Grant

GRANT TITLE: Code FOR America Labs INC.

Attached please find the original and 4 copies of each of the following:

- Proposed grant ordinance; original signed by Department, Mayor, Controller
- Grant information form, including disability checklist
- Grant budget — N/A
- Grant application — N/A
- Letter of Intent or grant award letter from funding agency
- Ethics Form 126 (if applicable)
- Contracts, Leases/Agreements (if applicable) NONE
- Other (Explain): SEE Code FOR America S.O.W.

**Special Timeline Requirements:**

**Departmental representative to receive a copy of the adopted resolution:**

Name: DAVE CURTO

Phone: 557-5581

Interoffice Mail Address:

Certified copy required Yes

No

(Note: certified copies have the seal of the City/County affixed and are occasionally required by funding agencies. In most cases ordinary copies without the seal are sufficient).

File Number: 121167  
(Provided by Clerk of Board of Supervisors)

**Grant Resolution Information Form**  
(Effective July 2011)

Purpose: Accompanies proposed Board of Supervisors resolutions authorizing a Department to accept and expend grant funds.

The following describes the grant referred to in the accompanying resolution:

1. Grant Title: **CODE for America Labs Inc.**
2. Department: **Human Services Agency**
3. Contact Person: **Trent Rhorer** Telephone: **557-6541**
4. Grant Approval Status (check one):  
 Approved by funding agency                       Not yet approved
5. Amount of Grant Funding Approved or Applied for: **\$ 105,000**
- 6a. Matching Funds Required: **\$ 255,000**  
b. Source(s) of matching funds: **\$75,000 HSA General Fund \$180,000 Department of Technology General fund.**
- 7a. Grant Source Agency: **N/A**  
b. Grant Pass-Through Agency (if applicable): **N/A**
8. Proposed Grant Project Summary: **Technology Solution for client access to benefits**
9. Grant Project Schedule, as allowed in approval documents, or as proposed:  
Start-Date: **October 1, 2012**                      End-Date: **December 31, 2013**
- 10a. Amount budgeted for contractual services: **\$255,000**  
b. Will contractual services be put out to bid? **No**  
c. If so, will contract services help to further the goals of the Department's Local Business Enterprise (LBE) requirements? **Not applicable**  
d. Is this likely to be a one-time or ongoing request for contracting out? **One time**
- 11a. Does the budget include indirect costs?                       Yes                       No  
b1. If yes, how much? **N/A**  
b2. How was the amount calculated? **N/A**  
c1. If no, why are indirect costs not included?  
 Not allowed by granting agency                       To maximize use of grant funds on direct services  
 Other (please explain):

c2. If no indirect costs are included, what would have been the indirect costs? N/A

12. Any other significant grant requirements or comments: Fellowship Program

**\*\*Disability Access Checklist\*\*\*(Department must forward a copy of all completed Grant Information Forms to the Mayor's Office of Disability)**

13. This Grant is intended for activities at (check all that apply):

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Existing Site(s)      | <input type="checkbox"/> Existing Structure(s)      | <input type="checkbox"/> Existing Program(s) or Service(s)       |
| <input type="checkbox"/> Rehabilitated Site(s) | <input type="checkbox"/> Rehabilitated Structure(s) | <input checked="" type="checkbox"/> New Program(s) or Service(s) |
| <input type="checkbox"/> New Site(s)           | <input type="checkbox"/> New Structure(s)           |  |

14. The Departmental ADA Coordinator or the Mayor's Office on Disability have reviewed the proposal and concluded that the project as proposed will be in compliance with the Americans with Disabilities Act and all other Federal, State and local disability rights laws and regulations and will allow the full inclusion of persons with disabilities. These requirements include, but are not limited to:

1. Having staff trained in how to provide reasonable modifications in policies, practices and procedures;
2. Having auxiliary aids and services available in a timely manner in order to ensure communication access;
3. Ensuring that any service areas and related facilities open to the public are architecturally accessible and have been inspected and approved by the DPW Access Compliance Officer or the Mayor's Office on Disability Compliance Officers.

If such access would be technically infeasible, this is described in the comments section below:

Comments:

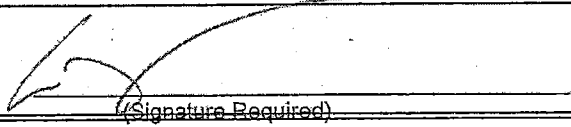
**This is a IT web based solution and it shall be 508 compliant, consistent with the CCSF's Web Accessibility Standards and Guidelines**

Departmental ADA Coordinator or Mayor's Office of Disability Reviewer:

Carla Johnson  
(Name)

Interim Director, Mayor's Office on Disability  
(Title)

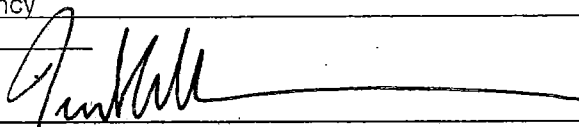
Date Reviewed: November 13, 2012

  
(Signature Required)

**Department Head or Designee Approval of Grant Information Form:**

Human Services Agency  
Trent Rhorer  
(Name)

Executive Director  
(Title)



Date Reviewed: November 13, 2012

(Signature Required)

Code for America Program Proposed Budget

<u>Uses</u>	CY 2013	Comments
<b>Fellowship Expenses - 3 Fellows</b>		
Salary, benefits, taxes, etc	\$ 158,000	Includes health, dental, taxes, etc.
Travel (including residency)	\$ 18,000	One month residency plus travel expenses over the
Team Building	\$ 5,000	
Hardware Costs	\$ 3,500	
<b>Total:</b>	<b>\$ 184,500</b>	
<b>Program Support Expenses (Organizational)</b>		
Salaries of key program staff and organizational support	\$ 110,000	Program Director, Program Coordinator, Technical
Fellowship Training	\$ 6,500	Intensive month-long January training and ongoing training
Infrastructure	\$ 51,000	Collaborative workspace/office, internet, software, etc
Strategy & Communications	\$ 8,000	Outreach, technology partnerships, etc.
<b>Total:</b>	<b>\$ 175,500</b>	
<hr/>		
<b>TOTAL PROGRAM BUDGET</b>	<b>\$ 360,000</b>	
<hr/>		
<u>Sources</u>		
<b>Code for America Grant</b>	<b>\$ 105,000</b>	
HSA and TIS Match	\$ 255,000	
	<b>\$ 360,000</b>	

# CODE *for* AMERICA

September 5, 2012

Trent Rhorer  
Executive Director, Human Services Agency  
City of San Francisco  
170 Otis Street, 8<sup>th</sup> Floor  
San Francisco, CA 94103

Re: **STATEMENT OF WORK**

Dear Trent:

Congratulations! We are pleased to inform you that Code For America Labs, Inc. ("CfA") has selected your application for participation in the 2013 Fellowship program ("Program"). CfA fellows will partner with your city to improve access to benefits. The potential problem areas discussed are: access to shelters, access to food stamps and access to MediCal.

To move the process forward, this letter identifies the Statement of Work (SOW) and shall operate as a binding agreement ("Agreement") together with the Terms and Conditions. Please review this letter and if you consent to the SOW, provide your signature in the appropriate place at the end of the letter.

Should you have any questions or comments, feel free to contact us at any time.

## Section A: Elements of Fellowship Program

<b>2013 Program Selection</b>	CfA selects partners that demonstrate strong leadership, secured funding, and a dedication to building efficiencies, transparency and citizen participation into government.
<b>Fellow Recruitment</b>	CfA recruits and selects passionate individuals with skills in technology, design, and management who want to dedicate a year to public service. Fellow selection is highly competitive. Applicants are evaluated by a selection committee composed of CfA staff, and industry and government leaders.
<b>CfA Training</b>	CfA fellows participate in a one-month intensive training experience covering relevant topics associated with government, industry and technology and will do a deep dive into learning about you city. Training also continues throughout the year.
<b>Residency</b>	During February 2013 the fellows will be on site in [Your City] working with the designated team there. Goals during this month include learning how City X operates, gathering information about the proposed program focus, building a network of government, community and developer support, and brainstorming ideas and solutions with industry leaders and city staff. City X is expected to provide tours of major departments and training in the major functions of the city, set up appropriate meetings between the Fellows and staff, and to make the necessary introductions to city employees in order to ensure a successful Program. City will host the CfA Fellows on site in city offices and provide them with space to work.
<b>Solution Building</b>	Over the course of the Program, Fellows will conduct interviews and research to inform and drive solutions. They will focus on developing applications that drive engagement, transparency and efficiencies. They will also catalyze the



Section B: Projected Milestones

2013 Program Selection – Finalists Announced	July 1, 2012
Recruitment of Fellows for 2013 Program	January 1 – October 1, 2012
Contract Completed	September 1, 2012
2013 Program Begins	January 2013
CfA Training	January 2013
City Residency	February 2013
Solution Building	March 2013 – September 2013
Program Conferences	October 2012 & October 2013
Wrap-Up and Hand Off	October – November 2013
Program Completed	November 2013

Section C: City Expectations

<b>Program Coordinator</b>	City will designate a Program Coordinator that will work with CfA staff to execute the contract, ensure the success of the Residency, support Fellows throughout the Program, and participate in team meetings and other meetings, as needed.
<b>Contract Execution</b>	City will ensure timely execution of the contract. This will require contract to be signed and completed by September 1, 2012.
<b>CfA Training</b>	Your City Team will participate in specific modules during CfA Training designed to introduce you to your assigned Fellows and help them understand program goals and objectives. These modules can be conducted via a video conference call.
<b>Host 2013 Residency</b>	City is expected to set up appropriate meetings between CfA Fellows and city staff and relevant community leaders and groups to ensure a successful Program. City X will host the CfA Fellows on site in city offices and provide them with space to work. As necessary, City X will also provide necessary access to government buildings and systems.
<b>City X Support</b>	City will be prepared to designate 5% - 10% of one or two staff's time to help support the Fellows during the program including serving as an overall resource, participating in planning and organizing meetings, identifying project sponsors, helping with sustainability planning, etc..
<b>Team Meetings</b>	City will participate in regular team meetings as required. Team meetings may occur more frequently during the Residency month and occasionally throughout Program..
<b>Program Conferences</b>	City will participate in two Program Conferences in San Francisco, CA tentatively scheduled for October 2012 and October 2013.
<b>Program Sustainability</b>	City will plan for and ensure sustainability of the solution after the 2013 Program. This may require identifying city resources that can support, maintain, and grow the solution over time.

Section D: Code for America Expectations

<b>Fellow Recruitment and Selection</b>	CfA recruits and selects passionate technologists throughout the country who want to give a year to public service. Fellow selection is highly competitive. Fellows are evaluated by a selection committee made up of CfA staff, and industry and government leaders.
<b>CfA Head of Government Relations</b>	CfA's head of Government Relations will be the City's primary point person within CfA for issues associated with contracting, overall program performance, and other issues as they arise. Other CfA staff will interact with the cities periodically around City Residency planning and overall program execution

	communication, client management, negotiation and team building.
<b>Residency</b>	CfA staff will partner with City X's Program Coordinator to ensure the success of Residency. CfA provides travel and housing expenses for the Fellows during the Residency period.
<b>Solution Building</b>	CfA Fellows will partner with city staff to develop solution(s) to the proposed focus, as defined in the 2013 Program application, or other focus that is mutually determined during the Program.
<b>Program Conferences</b>	CfA will host two conferences - one in October 2012 to orient the City Coordinator (and other applicable staff) to the 2013 program. The other will be in October, 2013 that will bring together city staff, Fellows, government partners, and industry leaders, to review and share progress, stories and further opportunities.
<b>Wrap-up and Hand Off</b>	CfA will dedicate the last two months of the Program to wrap-up and hand off the solution to ensure City X has the ability to sustain the solution. Events may be conducted in your city to formalize the transition.

Section E: Payments

**Program Fee.** City shall pay to CFA a fee for the City's participation in our program in the amount of \$180,000. Invoices will be issued 30 days prior to the scheduled payment date. Payments are scheduled as follows:

1. \$120,000 on November 1, 2012
2. \$120,000 on February 1, 2013
3. \$40,000 on May 1, 2013

Late Payments

In the event that the City fails to pay when due any amounts set forth above, CFA shall send to City written notice of such failure. If the City fails to cure the breach by paying such amounts within fifteen (15) days after receipt of such written demand, then City shall be deemed to be in material breach of this Agreement and CFA shall have the right to take any of the following actions: (i) suspend its own performance under this Agreement until such payment has been received; or (ii) terminate the Agreement, in which case CFA shall be entitled to receive payment of all amounts due under this Agreement through the effective date of termination. Regardless of the action taken by CFA, any amounts owed to CFA by City shall be calculated from the date the last payment was made up to, and, including the last day of the notice period by calculating a pro rata portion of the Program Fee.

Code for America Labs, Inc.

Name: Meghan Reilly

Title: CFO & Operations Director

Date: \_\_\_\_\_

X \_\_\_\_\_

Name: Trent Rhorer

Title: Executive Director

Date: \_\_\_\_\_

X \_\_\_\_\_

City and County of San Francisco

Human Services Agency

Department of Human Services  
Department of Aging and Adult Services



Edwin M. Lee, Mayor

Trent Rhorer, Executive Director

November 6, 2012

Ms. Angela Calvillo, Clerk  
Board of Supervisors  
City and County of San Francisco  
#1 Dr. Carlton B. Goodlett Place, Room 244  
San Francisco, CA 94102

Re: Accept and Expend Grant – Code for America \$105,000

Dear Ms. Calvillo:

Enclosed for the Board of Supervisors' approval is a proposed Resolution accepting a grant from Code for America in the amount of \$105,000 and authorizing its expenditure by the San Francisco Human Services Agency for the purpose of increasing access to public benefits by San Francisco's low income residents.

Please schedule this item on the Board's agenda at your earliest convenience. If you need additional information, please contact David Curto, Contract and Facilities Manager at 557-5581. Thank you for your assistance.

Sincerely,

A handwritten signature in cursive script, appearing to read "Trent Rhorer", followed by a horizontal line.

Trent Rhorer  
Executive Director

Enclosure

OFFICE OF THE MAYOR  
SAN FRANCISCO



EDWIN M. LEE  
MAYOR

TO: Angela Calvillo, Clerk of the Board of Supervisors  
FROM: *for* Mayor Edwin M. Lee *JE*  
RE: Accept and Expend Grant – Code for America – \$105,000  
DATE: December 4, 2012

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Attached for introduction to the Board of Supervisors is the resolution authorizing the San Francisco Department of Human Services to retroactively accept and expend a grant in the amount of \$105,000 from Code for America Labs, Inc. toward the cost of participating in the 2013 Code for America (CfA) Fellowship Program, which has specially selected the Department of Human Services to receive technology design services from CfA to increase access to public benefits by the City's lowest income residents.

I request that this item be calendared in Budget and Finance Committee.

Should you have any questions, please contact Jason Elliott (415) 554-5105.

RECEIVED  
BOARD OF SUPERVISORS  
SAN FRANCISCO

AK  
2012 DEC -4 PM 2:30

12/167

**FORM SFEC-126:**  
**NOTIFICATION OF CONTRACT APPROVAL**  
(S.F. Campaign and Governmental Conduct Code § 1.126)

<b>City Elective Officer Information</b> <i>(Please print clearly.)</i>	
Name of City elective officer(s): Members, Board of Supervisors	City elective office(s) held: Members, Board of Supervisors
<b>Contractor Information</b> <i>(Please print clearly.)</i>	
Name of contractor: Code for America Labs, Inc.	
<i>Please list the names of (1) members of the contractor's board of directors; (2) the contractor's chief executive officer, chief financial officer and chief operating officer; (3) any person who has an ownership of 20 percent or more in the contractor; (4) any subcontractor listed in the bid or contract; and (5) any political committee sponsored or controlled by the contractor. Use additional pages as necessary.</i>	
<ol style="list-style-type: none"> <li>1. Andrew McLaughlin, John Lily, Stacy Donohue, Andrew Greenhill, eric Reis, Nigel Jacob</li> <li>2. Jeffiner Pahlka CEO; Meghan Reilly CFO and COO</li> <li>3. NA</li> <li>4. NA</li> <li>5. NA</li> </ol>	
Contractor address: 155 – 9 <sup>th</sup> Street San Francisco, CA 94103	
Date that contract was approved: <i>(By the SF Board of Supervisors)</i>	Amount of contract: \$105,000
Describe the nature of the contract that was approved: Grant to go toward the cost of participating in the 2013 Code for America Fellowship Program	
Comments:	

This contract was approved by (check applicable):

the City elective officer(s) identified on this form

a board on which the City elective officer(s) serves: San Francisco Board of Supervisors  
Print Name of Board

the board of a state agency (Health Authority, Housing Authority Commission, Industrial Development Authority Board, Parking Authority, Redevelopment Agency Commission, Relocation Appeals Board, Treasure Island Development Authority) on which an appointee of the City elective officer(s) identified on this form sits

Print Name of Board

<b>Filer Information</b> <i>(Please print clearly.)</i>	
Name of filer: Angela Calvillo, Clerk of the Board	Contact telephone number: (415) 554-5184
Address: City Hall, Room 244, 1 Dr. Carlton B. Goodlett Pl., San Francisco, CA 94102	E-mail: Board.of.Supervisors@sfgov.org

Signature of City Elective Officer (if submitted by City elective officer)

Date Signed

Signature of Board Secretary or Clerk (if submitted by Board Secretary or Clerk)

Date Signed

**FORM SFEC-126:**  
**NOTIFICATION OF CONTRACT APPROVAL**  
(S.F. Campaign and Governmental Conduct Code § 1.126)

**City Elective Officer Information** *(Please print clearly.)*

Name of City elective officer(s):	City elective office(s) held:
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**Contractor Information** *(Please print clearly.)*

Name of contractor:  
Code for America Labs, Inc.

*Please list the names of (1) members of the contractor's board of directors; (2) the contractor's chief executive officer, chief financial officer and chief operating officer; (3) any person who has an ownership of 20 percent or more in the contractor; (4) any subcontractor listed in the bid or contract; and (5) any political committee sponsored or controlled by the contractor. Use additional pages as necessary.*

*Board: Andrew McLaughlin, John Lilly, Stacy Donohue, Andrew Greenhill, Eric Reis, Nigel Jacob*

*CEO: Jennifer Pahlka  
CFO & COO: Meghan Reilly*

Contractor address:  
155 9<sup>th</sup> Street, San Francisco, CA 94103

Date that contract was approved:	Amount of contract:
----------------------------------	---------------------

Describe the nature of the contract that was approved:

Comments:

This contract was approved by (check applicable):

- the City elective officer(s) identified on this form
- a board on which the City elective officer(s) serves

Print Name of Board

- the board of a state agency (Health Authority, Housing Authority Commission, Industrial Development Authority Board, Parking Authority, Redevelopment Agency Commission, Relocation Appeals Board, Treasure Island Development Authority) on which an appointee of the City elective officer(s) identified on this form sits

Print Name of Board

**Filer Information** *(Please print clearly.)*

Name of filer:	Contact telephone number:
Address:	E-mail:

Signature of City Elective Officer (if submitted by City elective officer)

Date Signed

Signature of Board Secretary or Clerk (if submitted by Board Secretary or Clerk)

Date Signed

S:\ALL FORMS\2008\Form SFEC-126 Contractors doing business with the City 11.08.doc