

AGREEMENT FOR PROFESSIONAL SERVICES

THIS AGREEMENT is made and entered into this ____ day of _____, 2022, by and between the City of Merced, a California Charter Municipal Corporation, whose address of record is 678 West 18th Street, Merced, California 95340, (hereinafter referred to as “City”) and United Way of Merced County, a California Non-Profit Corporation, whose address of record is 531 W. Main Street, Merced, California 95340, (hereinafter referred to as “Consultant”).

WHEREAS, City is undertaking a project to provide non-profit support to mitigate the impact of COVID-19 through American Rescue Plan Act (“ARPA”) funds for Fiscal Year 2022-2023; and,

WHEREAS, Consultant represents that it possesses the professional skills to provide community resources through the Mountain Valley 211 Program in connection with said project.

NOW, THEREFORE, the parties hereto, in consideration of the mutual covenants hereinafter recited, hereby agree as follows:

1. **SCOPE OF SERVICES.** The Consultant shall furnish the following services: Consultant shall provide the program services described in Exhibit “A” attached hereto.

No additional services shall be performed by Consultant unless approved in advance in writing by the City, stating the dollar value of the services, the method of payment, and any adjustment in contract time. All such services are to be coordinated with City and the results of the work shall be monitored by the City Manager or designee. However, the means by which the work is accomplished shall be the sole responsibility of the Consultant.

2. **TIME OF PERFORMANCE.** All of the work outlined in the Scope of Services shall be completed in accordance with the Schedule outlined in Exhibit “A” attached hereto and incorporated herein by reference. By mutual agreement and written addendum to this Agreement, the City and the Consultant may change the requirements in said Schedule.

3. **TERM OF AGREEMENT.** The term of this Agreement shall commence upon the day first above written and end on June 30, 2023.

4. COMPENSATION. Payment by the City to the Consultant for actual services rendered under this Agreement shall be made upon presentation of an invoice detailing services performed under the Scope of Services, in accordance with the fee schedule set forth in Exhibit "A" attached hereto and incorporated herein by reference. The Consultant agrees to provide all services required under the Scope of Services in Exhibit "A" within the compensation amount set forth in Exhibit "A". For Consultant's services rendered under this Agreement, City shall pay Consultant the not to exceed sum of Fifty Thousand Dollars (\$50,000.00).

5. METHOD OF PAYMENT. Compensation to Consultant shall be paid by the City after submission by Consultant of an invoice delineating the services performed.

6. RECORDS. It is understood and agreed that all plans, studies, specifications, data magnetically or otherwise recorded on computer or computer diskettes, records, files, reports, etc., in possession of the Consultant relating to the matters covered by this Agreement shall be the property of the City, and Consultant hereby agrees to deliver the same to the City upon termination of the Agreement. It is understood and agreed that the documents and other materials including but not limited to those set forth hereinabove, prepared pursuant to this Agreement are prepared specifically for the City and are not necessarily suitable for any future or other use.

7. CONSULTANT'S BOOKS AND RECORDS. Consultant shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or relating to charges for services or expenditures and disbursements charged to the City for a minimum of three (3) years, or for any longer period required by law, from the date of final payment to the Consultant to this Agreement. Any records or documents required to be maintained shall be made available for inspection, audit and/or copying at any time during regular business hours, upon oral or written request of the City.

8. INDEPENDENT CONTRACTOR. It is expressly understood that Consultant is an independent contractor and that its employees shall not be employees of or have any contractual relationship with the City. Consultant shall be responsible for the payment of all taxes, workers' compensation insurance and unemployment insurance. Should Consultant desire any insurance protection, the Consultant is to acquire same at its expense.

In the event Consultant or any employee, agent, or subcontractor of Consultant providing services under this Agreement is determined by a court of competent jurisdiction or the California Public Employees Retirement System (PERS) to be eligible for enrollment in PERS as an employee of the City, Consultant shall indemnify, protect, defend, and hold harmless the City for the payment of any employee and/or employer contributions for PERS benefits on behalf of Consultant or its employees, agents, or subcontractors, as well as for the payment of any penalties and interest on such contributions, which would otherwise be the responsibility of City.

9. INDEMNITY. Consultant shall indemnify, protect, defend (with legal counsel selected by the City), save and hold City, its officers, employees, and agents, harmless from any and all claims or causes of action for death or injury to persons, or damage to property resulting from intentional or negligent acts, errors, or omissions of Consultant or Consultant's officers, employees, volunteers, and agents during performance of this Agreement; Consultant shall indemnify, protect, defend (with counsel selected by the City) save and hold City, its officers, employees and agents harmless from any and claims or causes of action for any violation of any federal, state, or municipal law or ordinance, to the extent caused, in whole or in part, by the willful misconduct, negligent acts, or omissions of Consultant or its employees, subcontractors, or agents, or by the quality or character of Consultant's work, or resulting from the negligence of the City, its officers, employees, volunteers and agents, except for loss caused by the sole negligence or willful misconduct of the City or its officers, employees, volunteers or agents. It is understood that the duty of Consultant to indemnify and hold harmless includes the duty to defend as set forth in Section 2778 of the California Civil Code. Acceptance by City of insurance certificates and endorsements required under this Agreement does not relieve Consultant from liability under this indemnification and hold harmless clause. This indemnification and hold harmless clause shall survive the termination of this Agreement and shall apply to any damages or claims for damages whether or not such insurance policies shall have been determined to apply. By execution of this Agreement, Consultant acknowledges and agrees to the provisions of this Section and that it is a material element of consideration.

10. INSURANCE. During the term of this Agreement, Consultant shall maintain in full force and effect at its own cost and expense, the following insurance coverage:

a. Workers' Compensation Insurance. Full workers' compensation insurance shall be provided with a limit of at least One Hundred Thousand Dollars (\$100,000) for any one person and as required by law, including Employer's Liability limits of \$1,000,000.00 per accident. The policy shall be endorsed to waive the insurer's subrogation rights against the City.

b. General Liability.

- (i) Consultant shall obtain and keep in full force and effect general liability coverage at least as broad as ISO commercial general liability coverage occurrence Form CG 0001.
- (ii) Consultant shall maintain limits of no less than One Million Dollars (\$1,000,000) per occurrence for bodily injury, personal injury and property damage.
- (iii) The City, its officers, employees, volunteers and agents are to be named as additional insureds under the policy, as respects liability arising out of work or operations performed by or on behalf of the Consultant.
- (iv) The policy shall stipulate that this insurance will operate as primary insurance for work performed by Consultant and its sub-contractors, and that any other insurance or self insurance maintained by City or other named insureds shall be excess and non-contributory.
- (v) Consultant shall maintain its commercial general liability coverage for three (3) years after completion of the work and shall add an additional insured endorsement form acceptable to the City naming the City of Merced, its officers, employees, agents and volunteers for each year thereafter for at least three (3) years after completion of the work. Copies of the annual renewal and additional insured endorsement form shall be sent to the City within thirty (30) days of the annual renewal.

c. Automobile Insurance.

- (i) Consultant shall obtain and keep in full force and effect an automobile policy of at least One Million Dollars (\$1,000,000) per accident for bodily injury and property damage.

- (ii) The City, its officers, employees, volunteers and agents are to be named as additional insureds under the policy, as respects automobiles owned, leased, hired or borrowed by the Consultant.
- (iii) The policy shall stipulate that this insurance will operate as primary insurance for work performed by Consultant and its sub-contractors, and that any other insurance or self insurance maintained by City or other named insureds shall be excess and non-contributory.

d. Professional Liability Insurance. Consultant shall carry professional liability insurance appropriate to Consultant's profession in the minimum amount of One Million Dollars (\$1,000,000). Architects and engineers' coverage is to be endorsed to include contractual liability.

e. Qualifications of Insurer. The insurance shall be provided by an acceptable insurance provider, as determined by City, which satisfies all of the following minimum requirements:

- (i) An insurance carrier admitted to do business in California and maintaining an agent for service of process within this State; and,
- (ii) An insurance carrier with a current A.M. Best Rating of A:VII or better (except for workers' compensation provided through the California State Compensation Fund).

f. Certificate of Insurance. Consultant shall complete and file with the City prior to engaging in any operation or activity set forth in this Agreement, certificates of insurance evidencing coverage as set forth above and which shall provide that no cancellation or expiration by the insurance company will be made during the term of this Agreement, without thirty (30) days written notice to City prior to the effective date of such cancellation—including cancellation for nonpayment of premium. In addition to any other remedies City may have, City reserves the right to withhold payment if Consultant's insurance policies are not current.

11. PREVAILING WAGES.

A. Labor Code Compliance. If the work performed under this Agreement falls within Labor Code Section 1720(a)(1) definition of a “public works” the Vendor agrees to comply with all of the applicable provisions of the Labor Code including, those provisions requiring the payment of not less than the general prevailing rate of wages. The Consultant further agrees to the penalties and forfeitures provided in said Code in the event a violation of any of the provisions occurs in the execution of this Agreement.

B. These wage rate determinations are made a specific part of this Agreement by reference pursuant to Labor Code Section 1773.2. General Prevailing Wage Rate Determinations may be obtained from the Department of Industrial Relations Internet site at <http://www.dir.ca.gov/>.

C. After award of the Agreement, and prior to commencing work, all applicable General Prevailing Wage Rate Determinations, if applicable, are to be obtained by the Vendor from the Department of Industrial Relations. These wage rate determinations are to be posted by the Consultant at the job site in accordance with Section 1773.2 of the California Labor Code.

D. Consultant agrees to include prevailing wage requirements, if applicable, in all subcontracts when the work to be performed by the subcontractor under this Agreement is a “public works” as defined in Labor Code Section 1720(a)(1) and Labor Code Section 1771.

12. ASSIGNABILITY OF AGREEMENT. It is understood and agreed that this Agreement contemplates personal performance by the Consultant and is based upon a determination of its unique personal competence and experience and upon its specialized personal knowledge. Assignments of any or all rights, duties or obligations of the Consultant under this Agreement will be permitted only with the express written consent of the City.

13. TERMINATION FOR CONVENIENCE OF CITY. The City may terminate this Agreement any time by mailing a notice in writing to Consultant that the Agreement is terminated. Said Agreement shall then be deemed terminated, and no further work shall be performed by Consultant. If the Agreement is so terminated, the Consultant shall be paid for that percentage of the phase of work actually completed, based on a pro rata portion of the compensation for said phase satisfactorily completed at the time the notice of termination is received.

14. CONFORMANCE TO APPLICABLE LAWS. Consultant shall comply with its standard of care regarding all applicable Federal, State, and municipal laws, rules and ordinances. No discrimination shall be made by Consultant in the employment of persons to work under this contract because of race, color, national origin, ancestry, disability, sex or religion of such person.

Consultant hereby promises and agrees to comply with all of the provisions of the Federal Immigration and Nationality Act (8 U.S.C.A. 1101 *et seq.*), as amended; and in connection therewith, shall not employ unauthorized aliens as defined therein. Should Consultant so employ such unauthorized aliens for the performance of work and/or services covered by this Agreement, and should any agency or instrumentality of the federal or state government, including the courts, impose sanctions against the City for such use of unauthorized aliens, Consultant hereby agrees to, and shall, reimburse City for the cost of all such sanctions imposed, together with any and all costs, including attorneys' fees, incurred by the City in connection therewith.

15. WAIVER. In the event that either City or Consultant shall at any time or times waive any breach of this Agreement by the other, such waiver shall not constitute a waiver of any other or succeeding breach of this Agreement, whether of the same or any other covenant, condition or obligation. Waiver shall not be deemed effective until and unless signed by the waiving party.

16. INCONSISTENT OR CONFLICTING TERMS IN AGREEMENT AND EXHIBITS. In the event of any contradiction or inconsistency between any attached document(s) or exhibit(s) incorporated by reference herein and the provisions of the Agreement itself, the terms of the Agreement shall control.

Any exhibit that is attached and incorporated by reference shall be limited to the purposes for which it is attached, as specified in this Agreement. Any contractual terms or conditions contained in such exhibit imposing additional obligations on the City are not binding upon the City unless specifically agreed to in writing, and initialed by the authorized City representative, as to each additional contractual term or condition.

17. AMBIGUITIES. This Agreement has been negotiated at arms' length between persons knowledgeable in the matters dealt with herein. Accordingly, any rule of law, including, but not limited to, Section 1654 of the Civil Code of California, or any other statutes, legal decisions, or common-law principles of similar effect, that would require interpretation of any ambiguities in this

Agreement against the party that drafted this Agreement is of no application and is hereby expressly waived.

18. VENUE. This Agreement and all matters relating to it shall be governed by the laws of the State of California and any action brought relating to this agreement shall be held exclusively in a state court in the County of Merced.

19. AMENDMENT. This Agreement shall not be amended, modified, or otherwise changed unless in writing and signed by both parties hereto.

20. INTEGRATION. This Agreement constitutes the entire understanding and agreement of the parties and supersedes all previous and/or contemporaneous understanding or agreement between the parties with respect to all or any part of the subject matter hereof.

21. AUTHORITY TO EXECUTE. The person or persons executing this Agreement on behalf of the parties hereto warrants and represents that he/she/they has/have the authority to execute this Agreement on behalf of their entity and has/have the authority to bind their party to the performance of its obligations hereunder.

22. COUNTERPARTS. This Agreement may be executed in one or more counterparts with each counterpart being deemed an original. No counterpart shall be deemed to be an original or presumed delivered unless and until the counterparts executed by the other parties hereto are in the physical possession of the party or parties seeking enforcement thereof.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed on the date first above written.

CITY OF MERCED
A California Charter Municipal
Corporation

BY: _____
City Manager

ATTEST:
STEPHANIE R. DIETZ, CITY CLERK

BY: _____
Assistant/Deputy City Clerk

APPROVED AS TO FORM:

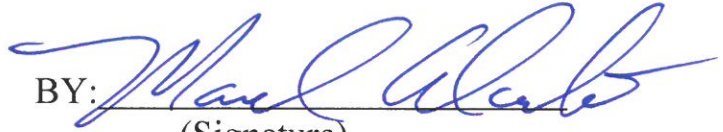
BY: Kimberly W. Maden 5/24/22
City Attorney Date

ACCOUNT DATA:

BY: _____
Verified by Finance Officer

{Signatures continued on next page}

CONSULTANT
UNITED WAY OF MERCED
COUNTY, A California Non-Profit
Corporation

BY: 
(Signature)

Manuel Alvarado
(Typed Name)

Its: CEO
(Title)

BY: _____
(Signature)

(Typed Name)

Its: _____
(Title)

Taxpayer I.D. No. _____

ADDRESS: 531 W. Main Street
Merced, CA 95340

TELEPHONE: (209) 383-4242

FAX: _____

E-MAIL: ceo@unitedwaymerced.org

United Way of Merced County

531 W. Main Street Merced, CA 95340

(209) 383-4242

www.unitedwaymerced.org

(A 501 (c) (3) Organization—Donations are tax deductible)

LIVE UNITED



Officers

President

Tim Robertson

*North Valley Labor
Federation*

Vice President

Daniel Sabzehzar

Tesseract Ventures

Past President

Enrique Guzman

U.C. Merced

Board of Directors

Joy Alexander

Mid-Valley IT

Jeff Porto, Jr.

*California State
University, Stanislaus*

Ashley Smith-Jenkins

Aureus Consultants Inc.

Jose Gonzales

*Planada Unified School
District*

Colton Dennis

*Merced Multi-Cultural
Art Center*

Sheila Brooks

*Merced County Office
of Education*

Christie Hendricks

*Retired from MCOE as
Assistant
Superintendent*

Rosanna Ayers

Biomimicry Institute

Jessica Moran

Merced College

Susan Walsh

Walsh, Cassidy & Walsh

Chief Executive Officer

Manuel J Alvarado

City of Merced

c/o Stephanie R Dietz

678 W 18th Street

Merced, CA 95340

Dear Mrs. Dietz,

The United Way of Merced County (UWMC) respectfully submits this proposal to you for the funding in the amount of \$50,000 to assist with the upgrading the Mountain Valley 211 Program (MV-211) system. At UWMC we stride to improve lives by mobilizing the caring power of communities around the world to advance the common good.

The Mountain Valley 211 Program adheres to the UWMC vision statement, to fight for the education, health, and financial stability of every person in every community. An equitable society has an obligation to remove barriers while providing support to all people. We have the power to end poverty, dismantle racism, and create a just nation for all. This vision is accomplished through providing all residents in the City of Merced with an easy-to-use resource/referral center. This program will reduce barriers for our community.

The goal of the UWMC is to combine the existing Help Hub Merced County with the MV-211 to deliver smooth, real-time assistance to residents of the City of Merced searching for community resources. Development of the Help Hub Merced County website began March 2020 out of the need of residents to locate much needed local resources. Residents would complete an online form asking for PPE, food, financial assistance, housing, and medical assistance. Staff would receive those requests, arrange for help to the individuals than follow up to make sure assistance receive was satisfactory.

The UWMC believes that MV-211 meets the service being requested through the Community Funding Grant. The program is accessible to all City of Merced residents via telephone or online. In fact, since the beginning of 2022, 61% of all calls and requests for assistance to the 2-1-1 program have been from the city of Merced. The reason for not moving completely online is to remain user friendly to our population who are not comfortable with technology. The program assists residents with locating community partners that provide affordable housing or housing for older adults. MV-211 assists residents in finding medical services, test and vaccination clinics, referrals to homeless services, older adult socialization, and fitness program, basically all services available through agencies and community partners in the City of Merced.

In 2019 the UWMC made the decision to bring MV-211 “in house” to the Merced office from United Ways of California. Doing so would allow for not only better referrals but allow for the database to be updated weekly. Due to a loss of \$118,000 in unrestricted funds through annual fundraisers in 2020 and 2021, this community service project had to be postponed.

Mountain Valley 211 Program

Mountain Valley 211 program will provide a comprehensive and localized system of information and referral from those seeking resources in a variety of human services categories, ranging from healthcare to housing to food resources. Services will be provided by live community resource specialists both by phone and by two-way SMS messaging services. In addition, a mobile application will be developed, allowing help seekers to access self-service searches and the existing website will be redeveloped with an emphasis on accessibility and ease of use, allowing more and quicker paths to assistance for those in need.

The Mountain Valley 211 Resource Database contains over three thousand programs in 2438 active categories. See the attached for a listing of the taxonomy terms that describe the needs contained in the database at present. The goal of the service itself is to provide a one-stop contact for connection to any community resource available to those in need with a high degree of convenience and precision and a minimal amount of frustration on the part of the help-seeker.

United Way of Merced County has developed the below timeline/benchmarks to keep the program upgrades/additions/enhancements on track

a. July 2022: Hire one to two part time bilingual staff members for call center to better serve the diverse population of the county. Having additional bilingual staff will reduce the need to rely on language interpretation services, providing a better overall client experience. In addition, another part-time staff member will be hired to clean up the MV-211 database with the program manager to make sure all information is up-to-date and provides quick service to our clients. The database manager and program manager will complete two major goals: ensure as close as possible to 100% participation by service providers and all records in the database are up to date with current contact information.

b. September 2022: Locate and secure web developer to assist in mobile app creation. The goal is to create a downloadable app for Android and IOS that will allow clients to search the MV-211 database and find referral contacts in self-service environments. After the release of the app in Fall 2022, UWMC will explore the feasibility of publishing MV-211 data online and/or in an App for smart phone in other languages, especially focusing on Spanish, Hmong, and/or Punjabi. This process would begin January 2023 and extend into the first part of 2023.

c. September 2022: In conjunction with the app, UWMC would secure another web developer to maximize ease-of-use of the website with a total redesign. The website will be easier to use on mobile devices, will have fresh and modern appearance and will incorporate easy functionality for service providers to request updates to their database entries.

d. October 2022: Create and launch paper/online marketing campaign targeted toward human service providers which will increase awareness of MV-211 and provide a case for the benefit of inclusion in the database to service providers.

e. January 2023: Identify gaps in the database or gaps in services within the county. Locate organizations to fill those gaps in services or provide funding opportunities to create services in those gaps with UWMC and other community-based organizations.

f. February 2023: Work with Unite Us platform to determine whether integration is feasible

United Way of Merced County Experience

Experience Past Five Years:

- 1.) You, Me COVID Free: Working in conjunction with Duke University, UWMC was tasked with distributing 200,000 at-home COVID testing kits to the general populace of the county. Over the six-week period, United Way successfully managed the program by partnering with local Community Based Organizations, county and city organizations, and local businesses. Currently the program is being evaluated as the go-to model for community engagement by Duke University.
- 2.) Small Business Grants: With funding from the City of Merced, UWMC was tasked with distributing \$450,000 worth of grants to local businesses affected by the COVID-19 pandemic. The HUD program began in October with the launch of an online application portal and as of March has had four successfully completed applications and forty-five applications in progress. Beginning in May 2022, the program will adapt and focus on businesses in districts who have not begun applying for funding.
- 3.) CIC grant funding: Through January – June 2022, UWMC has granted \$30,000 to 8 local nonprofits for capacity building and general use of funds for their organizations.
- 4.) Aliados por la salud: In partnership with UC San Francisco, Aliados por la salud provides rapid COVID-19 Testing to the residents of Planada and Le Grand at our testing facility. As of February 2022, Aliados por la salud has begun testing in the city of Merced at the UWMC office once a week and looks to expand testing to other parts of the county in the Spring of 2022.
- 5.) VITA: From February 2022 – June 2022, UWMC provides free tax preparation to the residents of Merced County. This service is provided to low-income families. Each year, the VITA program serves upwards of one hundred families and provides thousands of dollars in tax refunds to its residents. The program is made up of two UW staff members and volunteers who are trained in tax preparation and gain valuable experience and training in tax preparation.
- 6.) Mountain Valley 211 – MV-211 is a free phone number for the residents of Merced County to call to receive information regarding the services they need within the county. As of October 2021, the program was taken back by UWMC from the United Ways of California to provide better, more localized services to our residents. The program re-launched locally in March 2022 with a MV-211 app and new website launching towards the end of 2022, early 2023.

- 7.) COVID-19 Pandemic Relief: From March 2020 – present, UWMC has been actively engaged in supporting its community through our Rise United Relief Fund in which over \$1.4 million was distributed within the county in a variety of programs:
- a. Distance Learning Support to schools in Planada, Delhi, and Ballico
 - b. Individual rent and utility relief
 - c. Nonprofit Stabilization grants from \$2,500 - \$10,000 to 30 different county nonprofits.
 - d. Food Support to food pantries in which they could get the groceries they needed at a free/price reduced cost from the Merced County Food Bank
 - e. A partnership with the county of Merced, the Merced County Food Bank, and Better Homes and Gardens Realty which resulted in a senior food delivery program which served 200+ seniors a month.
 - f. PPE and supplies purchased on behalf of the county which was distributed amongst at-risk workers and community members
 - g. Support to county foster youth

Should you need more information or have questions regarding these programs/projects, please feel free to contact Robert Hypes, 531 W Main Street, Merced CA or by telephone: 209-947-1798.

Sincerely,



Manuel J Alvarado, CEO (he, him & his)
United Way of Merced County
531 W Main Street
Merced, CA 95340
(209) 383-4242
ceo@unitedwaymerced.org

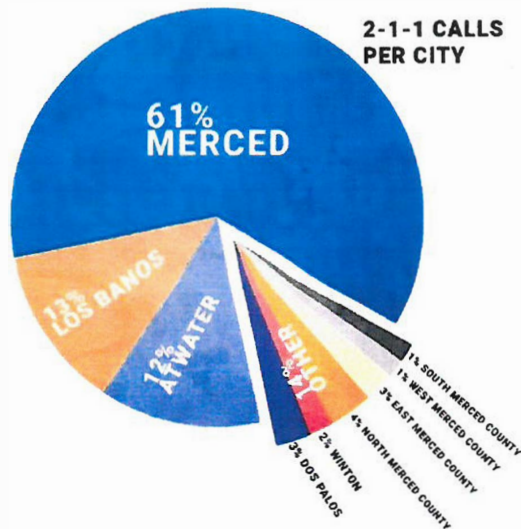
INDIVIDUAL STAFF EXPERIENCE

211 Program Manager: Andrew Burkum – 25 Years Experience	
Andrew has spent the last 25 years in leadership positions, managing individuals and processes with a number of organizations. He has been a supervisor/training coordinator for two previous call centers, most recently a high-volume fraud claims and investigation center for Chase bank. He also has a background in creative communications and marketing, having completed multiple successful campaigns for local organizations within the last five years.	Program Manager Core Functions: The 2-1-1 Program Manager assures that daily operations of the 2-1-1 Merced program are high quality, efficient and in accordance with United Way of Merced County standards. 2-1-1 Mountain Valley provides accurate, compassionate and appropriate referrals of community, health and social services to people who are navigating the social services network. Through community outreach and by developing strong relationships with organizational partners, the Program Manager's work increases overall client satisfaction.
211 Call Center Specialist (2 Hired, 2 TBD)	
Marty Christman – Four and a half years experience Marty worked in the customer service/call center area for over four and a half years with AT & T and San Jose Collection Agency. In addition, she brings over 10 years experience in office management having worked in medical offices, the Greater Chamber of Commerce and United Way.	211 Call Center Specialist Core Functions Deliver high quality, professional information and referral services to callers and actively support department functions. Assess caller needs, search online database for organizations that are capable of meeting those needs, provide caller with referrals to multiple organizations and thoroughly document each call. Other duties as assigned.
Luis Mejia-Jimenez Luis studied Psychology at UC Merced, graduating in 2019. He then worked directly with clients as a counselor for Creative Alternatives, Inc., a foster family agency. Coming to the United Way of Merced County in 2020 he has since worked as a program coordinator, overseeing logistics for multiple Human Services projects and has performed significant data entry and registration at UWMC's Planada-based COVID-19 test sites.	
2 Call Center Specialists (TBD) Bilingual with a focus in Spanish and Hmong	

211 Database Coordinator (TBD)

	211 Database Coordinator Core Functions Responsible for developing and maintaining 211 resource database entries representing Merced and Mariposa Counties to ensure the 211 Contact Center and the public have access to accurate, easily understood, up-to-date information about health and human services in each area. Requires the ability to maintain high quality, detail-oriented, efficient work on multiple projects on an ongoing basis. Reports to 211 Resource and Project Supervisor.
--	--

PROPOSED PROJECT AND SCOPE OF SERVICES



Mountain Valley 211 program will provide a comprehensive and localized system of information and referral from those seeking resources in a variety of human services categories, ranging from healthcare to housing to food resources. Services will be provided by live community resource specialists both by phone and by two-way SMS messaging services. In addition, a mobile application will be developed, allowing help seekers to access self-service searches and the existing website will be redeveloped with an emphasis on accessibility and ease of use, allowing more and quicker paths to assistance for those in need.

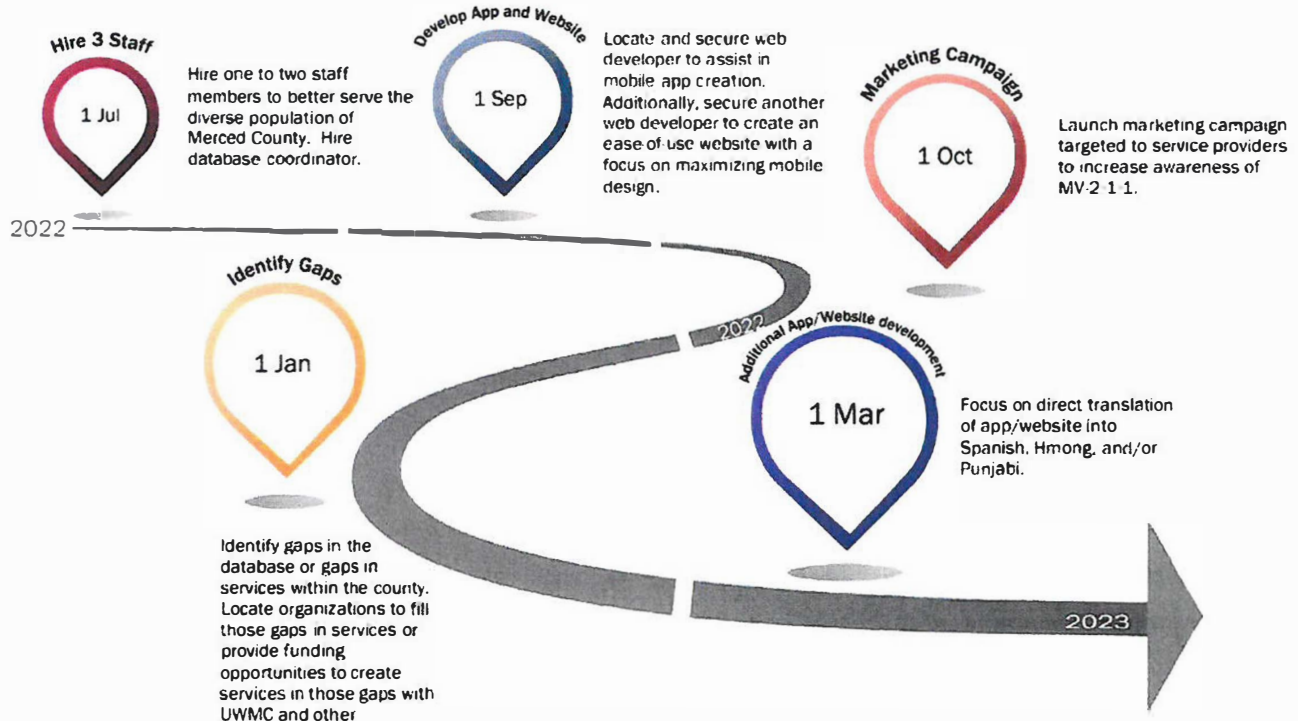
The Mountain Valley 211 Resource Database contains over three thousand programs in 2438 active categories. See the attached for a listing of the taxonomy terms that describe the needs contained in the database at present. The goal of the service itself is to provide a one-stop contact for connection to any community resource available to those in need with a high degree of convenience and precision and a minimal amount of frustration on the part of the help-seeker.

PROJECT TIMELINE AND DELIVERABLES

The major goals of the 2-1-1 program for July 2022 – June 2023 occur in multiple milestones.

PHASE	DELIVERABLE
Hire one to two part time bilingual staff members for the call center to better serve the diverse population of the county. In addition, another part-time staff member will be hired to clean up the MV-211 database with the program manager to make sure all information is up-to-date and provides quick service to our clients.	- Reduce the need to rely on language services, reducing cost of language translation services by 50% -Ensure as close as possible to 100% participation by service providers and all records in the database are up to date with current contact information
Locate and secure web developer to assist in mobile app creation. Locate web developer to maximize ease-of-use of the website with a total redesign of the 2-1-1 website	- create a downloadable app for Android and IOS that will allow clients to search the MV-211 database and find referral contacts in self-service environments. - website will be easier to use on mobile devices, will have fresh and modern appearance and will incorporate easy functionality for service providers to request updates to their database entries.

Create and launch paper/online marketing campaign targeted toward human service providers which will increase awareness of MV-211 and provide a case for the benefit of inclusion in the database to service providers.	-Increase service provider participation
Identify gaps in the database or gaps in services within the county.	-UWMC provides up to \$25,000 in funding to CBOs within the county to provide services for gaps identified by the 2-1-1 program
Work with United Us Platform	-Identify whether integration is feasible
Explore feasibility of publishing MV-211 data online and/or in an App for smart phone in other languages.	-Provide Spanish option for app and website



2-1-1 PROGRAM BUDGET

United Way of Merced County is requesting \$100,000 from the city to assist us in growing and expanding our 2-1-1 program in order to better serve the needs of our community. As part of the overall budget for 2-1-1 for July 2022 – June 2023, United Way has already secured funding from First Five of Merced County and Sunlight Giving. Additionally, we are seeking funding from outside sources to continue with the project.

211 Program Budget (July 2022 – June 2023)

Personnel	Total Budget	Requested City Funding	First 5 Funding	Sunlight Giving Funding	Additional Funding
Salaries/Wages	\$123,450	\$31,200	\$71,450	0	\$20,800
Benefits	\$19,014	\$3,078	\$10,922	0	\$5,014
Total Personnel	\$142,464	\$34,278	\$82,372	\$0	\$25,814
Operational Expenses					
Office Expenses	\$1,250	\$0	\$1,000	\$0	\$250
Travel and Training	\$4,605	\$0	\$1,057	\$0	\$3,548
Program Expenses	\$46,301	\$0	\$1,736	\$0	\$44,565
Other Expenses	\$9,200	\$9,200	\$0	\$0	\$0
Total Operating	\$61,356	\$9,200	\$3,793	\$0	\$48,363
Indirect @ 15% of Operating Personnel +	\$30,573	\$6,522	\$12,925	\$0	\$11,127

Total Personnel + Operating + Indirect		\$234,393	\$50,000	\$99,090	\$0	\$85,304
Subcontractors						
211	Call Outsourcing	\$25,910	0	\$910	\$25,000	\$0
Total Personnel + Operating + Indirect + Subcontractors		\$260,303	\$50,000	\$100,000	\$25,000	

United Way Budget Justification

PERSONNEL

Andrew Burkum: Program Manager: 1.00FTE - \$61,050

Mr. Burkum will serve as the Program Manager for 211 Merced. He has extensive experience in leadership, training, and call center management. As the Program Manager Mr. Burkum will be responsible for overseeing the daily operations of the program, ensuring quality assurance controls are in place and met, and overseeing program expansion via advertising and outreach

211 Call Specialist(s); 1.0FTE- \$41,600

The Community Resource Specialist will be responsible for delivering high quality, professional information and referral services to callers and actively support department functions. The 211 Call Specialists will be our boots on the ground and will be taking the majority of inbound calls.

Database Coordinator; 0.50FTE - \$20,800

The Database Coordinator is a temporary only position. The current database has not been updated in a few years and needs to be reviewed for validity. The Database Coordinator will be responsible for reviewing the existing database for accuracy by contacting all of the service providers listed and updating / confirming that the program info they offer is still valid and current as well as assisting with data entry for new service providers that are being added to the database.

Fringe and Related Benefits @ \$19,014 (See budget for breakdown of benefits per position)

Medical and Dental Benefits	\$6,600
Social Security Employment Tax	\$7,654
Medicare Employment Tax	\$1,790
Workers Compensation Insurance	\$1,235
Unemployment Insurance	\$1,736

OPERATING EXPENSES

Office Expenses: \$2,000

Yearly office supply budget which consists of consumable office supplies, postage, printing costs, and promotional expenses.

Travel & Training: \$4,605

Onboard training for Community Resource Specialists which consists of:

- Alliance of Information and Referral Systems (AIRS) - Training that teaches new call specialists on how to handle calls, make recommendations, the taxonomy of referral systems and how to manage databases.
- Crisis training - Training that teaches call specialists how to react and respond to a caller who is in a crisis situation (natural disasters, job loss, homelessness, suicidal thoughts)
- Travel - Mileage reimbursement to cover travel costs for Program Manager.
Reimbursable at maximum federal rate of \$0.585 / mile

AIRS Training for Call Specialists	\$267.50 ea. - \$2,675 total
AIRS Training for Database Specialists	\$367.50 ea. - \$735 total
Annual AIRS Membership	\$305.00 / year
Crisis Training	\$39.00 ea - \$390 total
Travel - Mileage allowance	\$500.00 / year

Program Expenses: \$46,300

Program specific 2-1-1 expenses related to:

1. **Advertising / Marketing** - We are planning a large social media campaign to let all of Merced County residents know that 211 is back and should be there one stop shop for when they need help. We will advertise via: Facebook, Instagram, Spotify, Pandora, and local transit ads (Merced The Bus)
2. **Meeting Expenses** - Costs associated with hosting meetings such as space reservations/rentals, food, etc.
3. **Live Translation Services** - Our 211 Call Specialists will be bilingual, but for any calls we receive in languages other than English or Spanish we will utilize an on demand translation service called Language Line which charges us \$1.15 / minute. This line item will cover approx. 21 hours of phone translation services for the year.
4. **10 New Call Workstations** - The 211 calls are routed through a voice over internet provider (VOIP) allowing our 211 Call Specialists or 211 Call Volunteers the ability to answer calls from anywhere. To do so they will need access to reliable technology. These workstations will consist of (1) business class laptop & accessories (mouse, carrying bag, etc), and a high quality headset.
5. **Website Development** - Currently the 211 website is outdated and clunky. We plan to hire a third party website developer that specializes in creating accessible websites to redesign / refresh the website. We anticipate this to cost \$15,000
6. **App Development** - We will be deploying a 211 Merced mobile application that will be compatible with all smartphones and tablets. This app will integrate directly with our database and making connecting residents to local resources even easier We anticipate this to cost \$15,000

Advertising / Marketing	\$8,000
Meeting Expenses	\$800
Live Translation Services	\$1,500
10 New Call Workstations @ \$600 ea.	\$6,000
Mobile App / Website Development	\$30,000

Other Expenses: \$9,200

iCarol Database Subscription \$5,000 - iCarol is the resource database that houses all of the available programs, the contact information for those programs, and the eligibility requirements.

Five9 Call Software \$4,200 - Five9 is a cloud based telephony system that will handle all inbound and outbound 211 calls. Utilizing a cloud based system instead of an on-premise system allows our call specialists to answer calls from anywhere.

CONTRACTORS

Community Action Partnership of Kern County: \$25,910

Community Action Partnership of Kern County provides assistance to the call center by providing trained Call Specialists during off hours. These hours include: Monday - Friday 5:00 pm - 8:00 am, all day Saturday & Sunday, and holidays.

INDIRECT COSTS

United Way of Merced County @ 15%: 30,685

It is standard policy for the United Way to have indirect costs calculated as 15% of the total program costs. Indirect costs are those that are incurred to support the program, but cannot be directly linked back to the program. Examples of these are executive oversight, human resources, finance, and quality management

TOTAL BUDGET

Year Two: \$261,164

Secured Funding: \$125,000

Requested Funding: \$100,000

Additional Funding to be sourced: \$36,125

REFERENCES

Michael Cohen-Wolkowicz, MD PhD
Kiser-Arena Distinguished Professor of Pediatrics, Duke University
Head, Pediatrics, Duke Clinical Research Institute
Co-Investigator, You & Me COVID-Free Program
Michael.cohenwolkowicz@duke.edu

Sheriff Vernon Warnke
Merced County Sheriff's Office
700 W 22nd Street
Merced, CA 95340
209-385-7445
Partnered in the COVID Free You and Me Program

Doug Dunford, City Manager
City of Gustine
352 Fifth St
Gustine, CA 95322
209-854-6471
Partnered in the COVID Free You and Me Program

Assemblyman Adam Gray
State Assembly
P.O. Box 911
Merced, CA 95341
2069-536-2131
Partnered in the COVID Free You and Me Program



Manuel Alvarado
Chief Executive Officer
United Way of Merced County
531 W Main St, Merced, CA 95340

February 1, 2022

To Whom It May Concern:

This serves as a letter of recommendation for United Way of Merced County as they seek American Rescue Plan Act funding. I am the Head of Pediatrics at the Duke Clinical Research Institute (DCRI), which is the largest academic research organization in the world with 900+ faculty and staff. The DCRI leads and oversees >500 clinical studies and has >\$250M in annual revenue from research programs sponsored by the federal government, industry corporations, and non-profit foundations. The DCRI leads national research programs addressing COVID-19 research questions including the Rapid Acceleration of Diagnostics in Underserved Populations Coordination and Data Collection Center (RADx-UP CDCC). This program aims to increase access and uptake of COVID-19 tests in historically marginalized populations and it is the single largest investment in health disparities in the history of the National Institutes of Health.

Collaborators from the Duke Clinical Research Institute (DCRI), University of North Carolina Center for Health Equity Research, and Community-Campus Partnerships for Health collaborated with United Way of Merced County from Nov. 2021 to Jan. 2022 to address at-home testing during the COVID-19 pandemic through the RADx-UP-funded [You & Me COVID-Free/Tú y Yo LIBRES de COVID](#) program. United Way of Merced County served as the lead community partner for the program, which provided free, at-home test kits to Merced County residents to slow the spread of COVID-19 by encouraging testing before gathering.

In their role as lead community partner, United Way of Merced County:

- Facilitated the distribution of **200,000 test kits** to Merced County residents in **six weeks**;
- Recruited more than **65 community partners** to assist with the effort;
- Coordinated more than **34 distribution events** to place test kits into the hands of community members; and
- Managed all on-the-ground logistics for the program, including the warehousing, tracking, and distribution.

Results from a survey of more than 30 community partner organizations in Merced County suggests that partners overwhelmingly agreed that the United Way met their expectations to support the You & Me COVID-Free program. According Pastor Ella Luna-Garza, United Methodist Church, Merced:

“What an amazing and productive partnership United Methodist Church of Merced has participated in with the You & Me COVID-Free program. The effort to distribute 200,000 test-at-home kits has helped to care for the health and wellness of families across Merced County. Persons were able to make safe holiday plans, receive needed care in a timely manner, and reduce the probabilities of larger outbreaks. Because of access to the COVID at-home tests, new grandmothers were able to hold newborn babies, brothers and sisters were able to visit each other over the holidays, friends could



share a meal together, the faithful could worship in community, and others could isolate safely. We are thankful for the outreach of the tests, and the ways in which it has cared for Merced.”

As the lead community partner, United Way was confident, competent, enthusiastic, and worked tirelessly to ensure the success of the You & Me COVID-Free program. On behalf of the entire You & Me COVID-Free leadership team, I wholeheartedly endorse United Way of Merced County to support future public health programs in Merced County and beyond. Our partnership and experience with United Way will inform similar strategies to increase at-home testing in underserved populations nationally.

Regards,
Micky

Michael Cohen-Wolkowicz, MD PhD
~~Kiser-Arena Distinguished Professor of Pediatrics, Duke University~~
Head, Pediatrics, Duke Clinical Research Institute
Co-Investigator, You & Me COVID-Free Program
michael.cohenwolkowicz@duke.edu, @mickycwMD
He/him/his