



# County of San Mateo

## Inter-Departmental Correspondence

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**Department:** HEALTH

**File #:** 21-579

Board Meeting Date: 7/13/2021

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**Special Notice / Hearing:** None  
**Vote Required:** Majority

**To:** Honorable Board of Supervisors

**From:** Louise F. Rogers, Chief, San Mateo County Health  
Scott Gilman, Director, Behavioral Health and Recovery Services

**Subject:** Agreement with LIFE Inc.

**RECOMMENDATION:**

Adopt a resolution authorizing an agreement with Living in Familiar Environments dba LIFE Inc. to provide representative payee services for the term of July 1, 2021 through June 30, 2023, in an amount not to exceed \$432,000.

**BACKGROUND:**

Representative payee services provide financial management for those individuals who are unable to manage their finances due to a serious mental illness and/or substance use conditions, or who are dependent adults. In San Mateo County, representative payee services traditionally have been divided between financial vendors who oversee the funds and issue checks, and the case managers who provide clinical services and disburse the funds to their clients. This has led to conflicting roles and occasional delays in payments. Receiving representative payee services from a single organization that can provide efficient, responsive, and flexible services will decrease the delay in getting funds to clients and provide more flexibility in payment practices. Moreover, it will reduce the number of late notices clients receive for essential items such as rent, which in turn reduces stress on our most vulnerable population.

In December 2018, the Behavioral Health and Recovery Services (BHRS) and Aging and Adult Services divisions released a Request for Proposals for representative payee services, and LIFE Inc. was awarded the contract in March 2019. LIFE Inc. has successfully been providing representative payee services since July 1, 2019.

**DISCUSSION:**

It is anticipated that LIFE Inc. will provide representative payee services to 350-400 BHRS clients. Services will include an initial intake process and money case management services.

The resolution contains the County's standard provision allowing amendment of the County's fiscal

obligations by a maximum of \$25,000 (in aggregate).

The agreement and resolution have been reviewed and approved by County Counsel as to form. This agreement is coming to your Board late due to prolonged contract negotiations and is on the Continuing Resolution.

It is anticipated that 95% of clients' bills managed by LIFE Inc. will be paid on time.

**PERFORMANCE MEASURE:**

Measure	FY 2020-21 Estimated	FY 21-22 Projected
Percentage of clients' bills managed by LIFE Inc. that are paid on time	95%* 332-380 clients	95%* 332-380 clients

\* It is not possible to reach 100% for this performance measure, as the remaining 5% is typically the result of late requests for new payments, billing errors, etc.

**FISCAL IMPACT:**

The term of the agreement is July 1, 2021 through June 30, 2023. The amount of the agreement is not to exceed \$432,000 for the two-year term. Of the maximum amount, \$216,000 will be allocated for FY 2021-22. Of this amount, it is anticipated that \$216,000 will be Net County Cost. These funds are included in the BHRS FY 2021-22 Recommended Budget. Similar arrangements will be in place for FY 2022-23.

Attachments:

1. RFP Matrix

<b>Representative Payee RFP - Matrix</b>		
<b>1</b>	Where was the RFP advertised?	www.publicpurchase.com
<b>2</b>	In addition to any advertisement, list others to whom the RFP announcement was sent:	An announcement was posted at <a href="https://www.smcgov.org/rfps">https://www.smcgov.org/rfps</a> providers to the Public Purchasing Office
<b>3</b>	State the total number of RFP's sent to prospective proposers:	none
<b>4</b>	How many proposals did you receive?	one

5	List in alphabetical order the names of the proposers (or finalists, if applicable) and the location:	LIFE Inc./Benefits Management
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