



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

Department of Benefits  
and Family Support  
Department of Disability  
and Aging Services  
Office of Early Care  
and Education

**MEMORANDUM**

P.O. Box 7988  
San Francisco, CA  
94120-7988  
[www.SFHSA.org](http://www.SFHSA.org)

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

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

**DATE:** JANUARY 6, 2021

**SUBJECT:** NEW GRANT: **SENIOR AND DISABILITY ACTION**  
(NON-PROFIT) FOR THE PROVISION OF SENIOR AND  
DISABILITY EMPOWERMENT, HOME CARE  
ADVOCACY, HOUSING ADVOCACY AND  
COUNSELING, AND FOR LONG-TERM CARE  
CONSUMER RIGHTS ADVOCACY

DS  
*EL*

**GRANT TERM:** 1/1/2021 – 6/30/2024

**GRANT AMOUNT:** See Table Below

<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$2,100,000			\$210,000	\$2,310,000
<b>PERCENTAGE:</b>	100%				100%



**London Breed**  
Mayor  
**Trent Rhorer**  
Executive Director

The Department of Disability and Aging Services (DAS) requests authorization to enter into a new grant with Senior and Disability Action for the following programs: 1) Senior and Disability Empowerment, 2) Home Care Advocacy, 3) Housing Advocacy and Counseling, 4) Long-Term Care Consumer Rights Advocacy, for the period of January 1, 2021 to June 30, 2024 in the amount of \$2,100,000, plus a 10% contingency, for a total grant amount not to exceed \$2,310,000. The purpose of these grants is for empowerment and advocacy training and coalition building. The focus is to help older adults and adults with disabilities understand services available to them, understand their rights as consumers, and understand how to ensure these services and rights. Much of the work is



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accomplished through collaboration building and joint advocacy with consumers, CBO's and policy makers.

<b>Grantee</b>	<b>FY 20/21<sup>1</sup> Annually for 3 years<sup>2</sup> Total</b>	<b>10% Contingency</b>	<b>Not to exceed</b>
Home Care Advocacy	\$55,000 \$110,000 <b>\$385,000</b>	\$38,500	\$423,500
Housing Advocacy and Counseling	\$80,000 \$160,000 <b>\$560,000</b>	\$56,000	\$616,000
Long-Term Care Consumer Rights Advocacy	\$60,000 \$120,000 <b>\$420,000</b>	\$42,000	\$462,000
Older Adults & Adults with Disabilities Empowerment	\$105,000 \$210,000 <b>\$735,000</b>	\$73,500	\$808,500
<b>Total</b>	<b>\$300,000</b> <b>\$1,800,000</b> <b>\$2,100,000</b>	<b>\$210,000</b>	<b>\$2,310,000</b>

<sup>1</sup> 1/1/2021 – 6/30/2021

<sup>2</sup> 7/1/2021 – 6/30/2022, 7/1/2022 – 6/30/2023, 7/1/2023 – 6/30/2024

### **Background**

In October of 2010 DAS conducted a Consumer Advocacy needs assessment to identify programs that best support seniors and adults with disabilities understand and advocate for their own rights and services. The needs assessment was updated in 2015 and listening sessions with community stakeholders have occurred in the interim that confirm earlier assessments. Four stratagems were identified as being most able to positively impact the well-being of seniors and adults with disabilities: 1) Training and Empowerment, 2) Home Care Advocacy, 3) Housing Advocacy and Counseling, 4) Long-Term Care Consumer Rights Advocacy.

### **Services to be Provided**

#### Home Care Advocacy

The Home Care Advocacy program works with consumers, community groups and policy-makers to guarantee older adults and adults with disabilities receive the in-home care essential to living independently in the community. Home care advocacy convenes two interrelated groups:



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1) Healthcare Action Team (HAT) and 2) the In- Home Supportive Services (IHSS) Task Force. HAT is a consumer advocacy group that works to empower seniors and people with disabilities. HAT works directly with consumers to gather their experiences, build leadership, and strategize on issues that affect them. The IHSS Task Force knows the importance of policy-makers remaining connected to those directly affected by the IHSS program. The IHSS Task Force brings together leaders of government agencies, non-profit organizations, and labor representatives with IHSS consumers and providers to facilitate listening, understanding and open communication.

### Housing Advocacy and Counseling

The Housing Advocacy and Counseling program works with seniors and adults with disabilities in need of housing, tenant's rights, and Single Room Occupancy hotel ("SRO") intercessions. This is accomplished, in part, through counseling services provided in conjunction with the Housing Rights Committee of San Francisco. Housing advocacy efforts include outreach and education, and coalition building. It also includes participation in public hearings and community forums that advocate for affordable housing, tenant and SRO resident rights. Meetings to specifically advocate for SRO residents are held with the goal of promoting improved living conditions and services for the senior and disabled residents of SRO buildings throughout San Francisco.

### Long-Term Care Consumer Rights Advocacy (LTCCRA)

The LTCCRA program provides information and training to individuals, family members, caregivers, and agencies on the services guaranteed through long-term care options in San Francisco. LTCCRA facilitates group trainings, and drop-in clinics at community hubs and resource fairs. Through a multi-lingual call center LTCCRA provides consolidated assistance to consumers. The call center is staffed by trained peer advocates and functions as an advice line by providing referrals, assistance and follow-up services. LTCCRA has developed ongoing training and retention practices to establish a core of peer advocates that provide direct one-to-one support and counseling on long-term care issues and referrals when appropriate.

### Senior and Disability Empowerment

Senior and Disability Empowerment includes the Senior and Disability Survival School and the Senior and Disability University Empowerment programs which are two skills training modules. Senior and Disability



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Survival School educates older adults and people with disabilities on the supportive services available to them, and how to access those services. Senior and Disability University Empowerment provides leadership training to enable consumers to advocate for their communities and themselves. The Empowerment program instructors take their curriculum into the community, with focus on the City’s most underserved neighborhoods. Sessions are held at community centers, public libraries and housing complexes and are publicized beforehand in conjunction with community partners. Classes can be translated into several languages, are free of cost, and offered in neighborhood hubs throughout San Francisco.

A newsletter, **SDA News and Views**, is disseminated each month to give updates to the community on SDA programs and events.

For more specific information regarding the services to be provided, please refer to the attached Appendix A.

**Selection**

Grantee was selected through Request for Proposal 864 which was competitively bid in August 2020.

**Funding**

Funding for this grant is provided through County General Funds.

**ATTACHMENTS**

<p><u>Home Care Advocacy</u> Appendix A – Scope of Services to be provided Appendix B – Budget</p>	<p><u>Housing Advocacy and Counseling</u> Appendix A1 – Scope of Services to be provided Appendix B1 – Budget</p>
<p><u>Long-Term Care Consumer Rights Advocacy</u> Appendix A2 – Scope of Services to be provided Appendix B2 – Budget</p>	<p><u>Senior and Disability Empowerment</u> Appendix A3 – Scope of Services to be provided Appendix B3 – Budget</p>

## APPENDIX A – SCOPE OF SERVICES

### SENIOR AND DISABILITY ACTION HOME CARE ADVOCACY

**January 1, 2021 to June 30, 2024**

#### I. Purpose

Grantee will work with consumers, community groups, unions, and local government, to educate and mobilize older adults and people with disabilities to advocate for critical home care services and form networks of advocacy. This advocacy informs and influences public opinion, media, and government decisions about home care services.

#### II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Frail	An individual that is determined to be functionally impaired because the individual: (a) is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision; and/or (b) due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Senior and Disability Action (SDA)
HSA	Human Services Agency of the City and County of San Francisco
IHSS	In-Home Supportive Services
In-Home Care	Supportive care provided in the home. Care may be provided by healthcare professionals who provide medical care needs or by informal caregivers who provide daily care to help to ensure the activities of daily living (ADL's) are met.

LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130
Older Adult	Person who is 60 years or older, used interchangeably with senior
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity. <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )

### III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited-English speaking
- Minority
- Frail
- LGBTQ+

### IV. Eligibility for Services

Participants in the Home Care Advocacy program are individuals involved in the delivery and enhancement of home care and related health issues; and are working to ensure that older adults and persons with disabilities are able to live independently in the community.

**V. Location and Time of Services**

Home Care Advocacy services are provided at SDA offices and at other settings around the City, and on phone and video. SDA offices are located at 1360 Mission St., 4th Floor, San Francisco, CA 94103. The hours of operation are 9:00 a.m. to 5 p.m., Monday through Friday.

**VI. Services to be Provided**

Home Care Advocacy includes two main components: Healthcare Action Team (HAT) and the In-Home Supportive Services (IHSS) Task Force.

- 1) HAT is a consumer advocacy group that focuses on mobilizing older adults and people with disabilities. HAT gathers consumer experiences and stories, builds leadership, and takes action on issues that affect the lives of its members. Volunteer HAT members educate the community, meet with local and state legislators, and hold rallies and other public events to inform and influence public opinion, media, and government decisions.
- 2) The IHSS Task Force recognizes the need for decision makers to hear the voices of those directly affected by the IHSS program. The IHSS Task Force brings together leaders of government agencies, non-profit organizations, and labor representatives, along with IHSS consumers and providers.
- 3) A bi-monthly newsletter is produced to give updates to the community on issues pertaining to home care and related issues (i.e., legislative matters, meeting notices, city and/or state budget matters, etc.)

**VII. Unit of Service Definitions**

- Grantee will hold IHSS Task Force and HAT meetings to address planning and action for home care advocacy.

UNIT: one meeting.

- Grantee will form committees and groups to work as advocates to improve the IHSS delivery system.

UNIT: one committee or group.

- Grantee will provide presentations and outreach activities to educate the public, involve older adults and people with disabilities in home care advocacy.

UNIT: one presentation.

- Grantee will develop relationships with policy makers/legislators, lobbying groups and consumer groups to seek support for IHSS and other home care issues and elicit their participation in impacting the legislative arena.

UNIT: one contact.

- Grantee will develop and create multi-media exposures: news articles, TV or radio talk show appearances, computer exposure, or other creative marketing techniques.

Unit: one exposure.

## **VIII. Service Objectives**

### On an annual basis:

- Grantee will convene at least **10** IHSS Task Force meetings.
- Grantee will convene at least **10** HAT meetings.
- Grantee will establish or maintain at least **6** strategic committees or alliances.
- Grantee will perform at least **16** community presentations.
- Grantee will document at least **12** advocacy connections with agencies & organizations.
- Grantee will participate in at least **10** opportunities for community engagement.
- Grantee will distribute updates to at least **1000** people per month through the SDA newsletter, email lists, and social media to educate and foster advocacy.
- Grantee will engage in at least **24** legislative contacts to strengthen relationships and to advocate for homecare issues.
- Grantee will complete at least **10** multi-media events including a full range of medical outlets such as social media, TV, radio and print.

## **IX. Outcome Objectives**

- 1) At least **85%** of the participants in the IHSS Task Force and HAT will participate actively in campaigns and events held by the group.
- 2) At least 85% of the participants in the IHSS Task Force and HAT will report in an annual consumer survey feeling satisfied with the operation and accomplishments of the group.

## **X. Reporting and Other Requirements**

Grantee will provide various reports during the term of the grant agreement.

- 1) The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- 2) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the Service Objectives.:
- 3) Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee, and the IHSS Task Force advocacy priority list and work plan. Grantee will enter the

annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis

- 4) Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- 5) Grantee will provide an annual consumer satisfaction survey report to OCP by March 15 each grant year. At least 60% of the participants of the IHSS Task Force will complete the consumer satisfaction survey. At least 70% of the Healthcare Action Team (HAT) will complete the consumer satisfaction survey.
- 6) Grantee shall develop and deliver ad hoc reports as requested by DAS and/or HSA.
- 7) Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Rick Appleby  
Program Analyst  
DAAS, Office on the Aging  
PO Box 7988  
San Francisco, CA 94120  
[rick.appleby@sfgov.org](mailto:rick.appleby@sfgov.org)

Steve Kim  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
[Steve.Kim@sfgov.org](mailto:Steve.Kim@sfgov.org)

## **XI. Monitoring Activities**

- 1) Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VIII & IX, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not

activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 2) Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name			Term		
6	<b>Senior and Disability Action</b>			1/1/21-6/30/24		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.			No. of Mod.		
9	<b>Program: Home Care Advocacy</b>					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$41,160	\$80,945	\$80,945	\$80,945	\$283,995
14	Operating Expense	\$6,666	\$14,707	\$14,707	\$14,707	\$50,788
15	<b>Subtotal</b>	<b>\$47,826</b>	<b>\$95,652</b>	<b>\$95,652</b>	<b>\$95,652</b>	<b>\$334,783</b>
16	Indirect Percentage (15%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$7,174	\$14,348	\$14,348	\$14,348	\$50,217
18	Capital Expenditure	\$0	\$0	\$0	\$0	\$0
19	<b>Total Expenditures</b>	<b>\$55,000</b>	<b>\$110,000</b>	<b>\$110,000</b>	<b>\$110,000</b>	<b>\$385,000</b>
20	<b>HSA Revenues</b>					
21	General Fund	\$55,000	\$110,000	\$110,000	\$110,000	\$385,000
22						
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$55,000</b>	<b>\$110,000</b>	<b>\$110,000</b>	<b>\$110,000</b>	<b>\$385,000</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	<b>Total Revenues</b>	<b>\$55,000</b>	<b>\$110,000</b>	<b>\$110,000</b>	<b>\$110,000</b>	<b>\$385,000</b>
37	Full Time Equivalent (FTE)	0.54	1.08	1.08	1.08	
39	Prepared by: Jessica Lehman		Telephone No.: 510-427-7535		Date: 12/17/20	
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>10/25/2016</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3										
4	<b>Program: Home Care Advocacy</b>									
5	(Same as Line 9 on HSA #1)									
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10										
11		Agency Totals		HSA Program		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Executive Director	\$73,046	1.00	9%	0.09	\$4,383	\$6,766	\$6,766	\$6,766	\$24,681
14	Health Care Organizing Director	\$56,316	1.00	91%	0.91	\$25,625	\$51,190	\$51,190	\$51,190	\$179,195
15	<i>IHSS Task Force Assistant</i>	\$53,100	1.00	8%	0.08	\$1,655	\$4,310	\$4,310	\$4,310	\$14,585
16					-					
17					-					
18					-					
19					-					
20					-					
21					-					
22					-					
23					-					
24					-					
25					-					
26					-					
27					-					
28					-					
29					-					
30	TOTALS	\$182,462.00	3.00	108%	1.08	\$31,663	\$62,266	\$62,266	\$62,266	\$218,461
31	FRINGE BENEFIT RATE	30%								
32	EMPLOYEE FRINGE BENEFITS	\$54,739				\$9,497	\$18,679	\$18,679	\$18,679	\$65,534
33										
34										
35										
36	TOTAL SALARIES & BENEFITS	\$237,201				\$41,160	\$80,945	\$80,945	\$80,945	\$283,995
37	HSA #2									10/25/2016



## APPENDIX A1- SCOPE OF SERVICES

### SENIOR AND DISABILITY ACTION HOUSING ADVOCACY AND COUNSELING

**January 1, 2021 to June 30, 2024**

#### I. Purpose

The purpose of this grant is to empower older adults and adults with disabilities in the areas of housing and tenant rights and Single Room Occupancy hotel (“SRO”) advocacy. This empowerment is accomplished through counseling, education and information, community outreach, and civic engagement.

#### II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services (previously Department of Aging and Adult Services/DAAS)
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Senior and Disability Action (SDA)
Housing Counseling	Provides information to individuals who believe they are in jeopardy of being evicted and provides assistance to those individuals requiring tenant rights advocacy.
Housing Advocacy	Training of individuals and groups to provide information regarding the need of affordable and accessible senior housing. Development of and participation with coalitions working for housing and tenant rights in San Francisco.

Housing Collaborative	A group of tenants, homeowners, community advocates organizing to preserve and create quality, affordable, accessible housing in San Francisco. There is a monthly meeting to strategize community organizing and policy change.
HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130
Older Adult	Person who is 60 years or older, used interchangeably with senior
OCP	Office of Community Partnerships (previously Office on the Aging/OOA)
Outreach And Education	Preparation and distribution of materials that inform and advise older adults and adults with disabilities of their housing rights as well as opportunities to participate in advocacy coalitions.
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity. <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )
SRO	Single room occupancy hotel
SRO Collaborative	Organizations funded by Department of Building Inspection to help organize tenants within the SROs.

### **III. Target Population**

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- LGBTQ+

### **IV. Eligibility for Housing Advocacy and Counseling Services**

- 1) A resident of San Francisco and
- 2) Aged 60 and above, or
- 3) Aged 18 -59 living with a disability

### **V. Location and Time of Services**

Housing Advocacy and Counseling services are provided at SDA offices and at other settings around the City, and online. SDA offices are located at 1360 Mission St., 4th Floor, San Francisco, CA 94103. The hours of operation are 9:00 a.m. to 5 p.m., Monday through Friday.

### **VI. Services to be Provided**

- 1) Education and Outreach: Preparation and distribution of information to help inform older adults and people with disabilities of housing rights and available housing options, and to empower older adults and people with disabilities to advocate for improved housing options.
- 2) Housing Counseling: will help prevent eviction by providing face to face counseling regarding tenant rights.
- 3) Housing Advocacy: support of affordable and accessible housing for older adults and adults with disabilities. Much of the work is in coalition with other service providers or community groups including participation in public hearings, community forums and group meetings.
- 4) SRO Advocacy: To help promote supportive services, housing stability and improved living conditions for older adults and adults with disabilities who reside in SROs. Including convening of meetings to advocate for supportive services, housing stability, improved living conditions in SROs.

### **VII. Unit of Service Definitions**

- Grantee will provide counseling assistance to individuals on tenant rights and eviction prevention issues.

UNIT: one consumer receiving counseling

- Grantee will participate in and facilitate meetings to advocate for housing options for older adults and adults with disabilities and improved living conditions, access to supportive services and housing stability for SRO residents.

UNIT: one public hearing, meeting, demonstration, information sharing event, or other public gathering.

- Grantee will convene the SRO Senior and Disability Workgroup which will include SRO residents, the SRO Collaboratives, the Department of Building Inspection, the Mayor's Office on Disability, and/or other concerned city and community representatives. The purpose of the Workgroup will be to advocate for improved SRO living conditions.

UNIT: one meeting focused on SRO issues.

- Grantee will hold meetings of the Housing Collaborative, bringing together partner agencies with older adults and people with disabilities, to advocate for tenant rights and affordable housing.

UNIT: one meeting of the Housing Collaborative.

- Grantee will involve older adults and people with disabilities in housing and SRO advocacy efforts.

UNIT: one volunteer.

- Grantee will provide outreach to the older adult and disability communities.

UNIT: one consumer.

## **VIII. Service Objectives**

On an annual basis:

- Grantee will provide counseling to at least **250** consumers.
- Grantee will participate in and/or facilitate **96** public hearings, public events, or meetings.
- Grantee will convene at least **10** meetings of the SRO Senior and Disability Workgroup
- Grantee will hold at least **10** meetings of the Housing Collaborative.
- Grantee will involve at least **50** older adults and people with disabilities per month in housing and SRO advocacy efforts.
- Grantee will provide **50** older adults and people with disabilities per month with tenant rights information and advocacy opportunities.

## **IX. Outcome Objectives**

- 1) At least 85% of consumers will state that the agency provided accurate and current tenants rights information to help them with their housing issue.

- 2) At least 75% of participants in the Housing Collaborative and SRO Work Group will take part in advocacy activities; attending community meetings, rallies, letter writing, public testimony.
- 3) At least 75% of SRO residents participating with SDA's SRO Advocacy will agree that advocacy efforts are making progress toward improving housing stability and/or living conditions in SROs.
- 4) At least 75% of people participating with SDA's Housing Collaborative agree that advocacy efforts are making progress toward affordable and accessible housing.

**X. Reporting Requirements**

Grantee will provide various reports during the term of the grant agreement.

- 1) The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- 2) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding Service Objectives
- 3) Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis.
- 4) Number of consumers satisfied that the agency provided accurate and current tenant rights information to help them prevent eviction or during an eviction proceeding, or to seek affordable housing.
- 5) Number of public hearings, community forums, or meetings held as it relates to housing advocacy issues.
- 6) Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- 7) Grantee will provide an annual consumer survey report of 35% of contracted consumers served to OOA by March 15 each grant year.

Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Rick Appleby  
Program Analyst  
DAAS, Office on the Aging  
P.O. Box 7988  
San Francisco, CA 94120  
[rick.appleby@sfgov.org](mailto:rick.appleby@sfgov.org)

Steve Kim  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120  
[Steve.Kim@sfgov.org](mailto:Steve.Kim@sfgov.org)

## **XI. Monitoring Activities**

- 1) Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VIII & IX, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
  
- 2) Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name			Term		
6	<b>Senior and Disability Action</b>			1/1/21-6/30/24		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.			No. of Mod.		
9	<b>Program: Housing Advocacy and Counseling</b>					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$54,044	\$100,656	\$100,656	\$100,656	\$356,012
14	Operating Expense	\$15,521	\$38,474	\$38,474	\$38,474	\$130,943
15	<b>Subtotal</b>	<b>\$69,565</b>	<b>\$139,130</b>	<b>\$139,130</b>	<b>\$139,130</b>	<b>\$486,955</b>
16	Indirect Percentage (15%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$10,434.75	\$20,870	\$20,870	\$20,870	\$73,043
18	Capital Expenditure	\$0	\$0	\$0	\$0	\$0
19	<b>Total Expenditures</b>	<b>\$80,000</b>	<b>\$160,000</b>	<b>\$160,000</b>	<b>\$160,000</b>	<b>\$560,000</b>
20	<b>HSA Revenues</b>					
21	General Fund	\$80,000	\$160,000	\$160,000	\$160,000	\$560,000
22						
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$80,000</b>	<b>\$160,000</b>	<b>\$160,000</b>	<b>\$160,000</b>	<b>\$560,000</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	<b>Total Revenues</b>	<b>\$80,000</b>	<b>\$160,000</b>	<b>\$160,000</b>	<b>\$160,000</b>	<b>\$560,000</b>
37	Full Time Equivalent (FTE)	0.71	1.41	1.41	1.41	
39	Prepared by: Jessica Lehman		Telephone No.: 510-427-7535		Date: 12/16/20	
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>10/25/2016</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3										
4	Program: Housing Advocacy and Counseling									
5	(Same as Line 9 on HSA #1)									
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10										
11		Agency Totals		HSA Program		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
12	POSITION TITLE									
13	Executive Director	\$73,046	1.00	16%	0.16	\$6,574	\$11,687	\$11,687	\$11,687	\$41,635
14	Housing Organizer 1	\$53,560	1.00	50%	0.50	\$16,068	\$26,780	\$26,780	\$26,780	\$96,408
15	Housing Organizer 2	\$52,000	1.00	75%	0.75	\$18,930	\$38,960	\$38,960	\$38,960	\$135,810
16					-					
17					-					
18					-					
19					-					
20					-					
21					-					
22					-					
23					-					
24					-					
25					-					
26					-					
27					-					
28					-					
29					-					
30	TOTALS	\$178,606	3.00	141%	1.41	\$41,572	\$77,427	\$77,427	\$77,427	\$273,853
31										
32	FRINGE BENEFIT RATE	30%								
33	EMPLOYEE FRINGE BENEFITS	\$53,582				\$12,472	\$23,229	\$23,229	\$23,229	\$82,159
34										
35										
36	TOTAL SALARIES & BENEFITS	\$232,188				\$54,044	\$100,656	\$100,656	\$100,656	\$356,012
37	HSA #2									10/25/2016



## APPENDIX A2 – SCOPE OF SERVICES

### SENIOR AND DISABILITY ACTION LONG-TERM CARE CONSUMER RIGHTS ADVOCACY ("LTCCRA")

**January 1, 2021 to June 30, 2024**

#### I. Purpose

The purpose of this grant is to provide information and training to individuals, caregivers, and agencies on the basic rights and services guaranteed through long-term care services in San Francisco.

#### II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services (previously Department of Aging and Adult Services/DAS)
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Senior and Disability Action (SDA)
HSA	Human Services Agency of the City and County of San Francisco
IHSS	In-Home Supportive Services
Long-Term Care Services	Individualized, coordinated service that enables individual independence, and quality of life. It is common for long-term care to provide assistance with Activities of Daily Living (ADLs) bathing, dressing, eating, toileting. Long-Term Care Services can include services such as In-Home Support Services (IHSS), adult daycare, and caregiver support.

LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LTCCC	Long-Term Care Coordinating Council is the single body in San Francisco to advise the Mayor on policy, planning and service delivery issues for older adults and people with disabilities. The LTCCC advises, implements and evaluates all issues relating to long term care (LTC) and supportive services, including how different service systems interact.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130
Older Adult	Person who is 60 years or older, used interchangeably with senior
OCP	Office of Community Partnerships (previously the Office on the Aging/OCP)
Peer Advocate	A trained consumer who provides a communication bridge between providers and consumers through the call center.
Senior	Person who is 60 years or older, used interchangeably with older adult

### III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following groups with the greatest economic and social need.

- Low-income
- Non or limited-English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

### IV. Eligibility for Long-Term Care Consumer Rights Advocacy

- 1) Resident of San Francisco
- 2) Aged 18 and above and in need of or a recipient of long-term care services or
- 2) A family member or care provider to persons eligible for long-term care services.

**V. Location and Time of Services**

Long-Term Care Consumer Rights Advocacy services are provided at SDA offices and at other settings around the City, and over phone and video. SDA offices are located are located at 1360 Mission St., 4th Floor, San Francisco, CA 94103. The hours of operation are 9:00 a.m. to 5 p.m., Monday through Friday.

**VI. Services to be Provided**

- 1) Training for consumers and providers on the basic rights and services made available through many programs offering long-term care services in San Francisco.
- 2) Outreach and information sharing including: development of informational materials, discussion sessions, drop-in clinics at community centers, and resource fairs.
- 3) Centralized information and assistance by creating a multi-lingual, consumer-directed call center that is a central advice line, providing problem-solving referrals, assistance and follow-ups.
- 4) Development and retention of a group of peer advocates that will provide direct one-to-one support and counseling on long-term care issues and related issues.
- 5) Compiling data on consumer contacts and issues that arise and reporting regularly to DAS and the LTCCC.

**VII: Units of Service Definitions**

On an annual basis, the Grantee will provide the following services as part of LTCCRA

- 1) Consumer contact which includes:
  - a. Information and Referral: Providing consumers with information on long-term care services available within their communities.
  - b. Assistance and Advocacy: Linking individuals to available services.
  - c. Follow-up: Contacting the consumer to ascertain status of their concern.

UNIT: one consumer contact.

- 2) Outreach activities include in-person and online trainings, discussion sessions, drop-in clinics at community centers, resource fairs.

UNIT: one outreach activity

- 3) Status report: a compilation of consumer requests and concerns accrued by the call center and field workshops.

UNIT: unit is one report given to LTCCC.

**VIII. Service Objectives**

On an annual basis:

- Grantee will serve at least **250** unduplicated consumers.
- Grantee will provide at least **50** contacts.
- Grantee will provide at least **48** units of outreach activities.
- Grantee will provide **1** status report to the Long-Term Care Coordinating Council.

- Grantee will recruit, train and engage at least **6** peer advocates to provide one-to-one assistance to consumers.

**IX. Outcome Objectives**

- 1) At least **70%** of consumers credit LTCCRA with providing valuable resources and information about long-term care and related services.
- 2) At least **70%** of consumers rate the quality of services they received as good or excellent.
- 3) At least **75%** of peer advocates are satisfied with their ability to help consumers.

**X. Reporting and Other Requirements**

Grantee will provide various reports during the term of the grant agreement.

- 1) The grantee will enter into the CA Getcare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- 2) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the Service Objectives.:
- 3) Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee.
- 4) Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- 7) Grantee will provide an annual consumer satisfaction survey report to OCP by March 15 each grant year. At least 35% of contracted unduplicated consumers will complete the Consumer Satisfaction Survey.
- 8) The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to Appendices F-1 & F-2.
- 9) Grantee shall develop and deliver ad hoc reports as requested by DAS and/or HSA. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Rick Appleby  
Program Analyst  
DAS, Office on the Aging  
PO Box 7988  
San Francisco, CA 94120  
[rick.appleby@sfgov.org](mailto:rick.appleby@sfgov.org)

Steve Kim  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120  
[Steve.Kim@sfgov.org](mailto:Steve.Kim@sfgov.org)

## **XI. Monitoring Activities**

- 1) Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VIII & IX, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
  
- 2) Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name			Term		
6	<b>Senior and Disability Action</b>			1/1/21-6/30/24		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.			No. of Mod.		
9	<b>Program: Long-Term Care Consumer Rights Advocacy</b>					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$43,447	\$82,060	\$82,060	\$82,060	\$289,627
14	Operating Expense	\$8,727	\$22,288	\$22,288	\$22,288	\$75,591
15	<b>Subtotal</b>	<b>\$52,174</b>	<b>\$104,348</b>	<b>\$104,348</b>	<b>\$104,348</b>	<b>\$365,218</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$7,826	\$15,652	\$15,652	\$15,652	\$54,783
18	Capital Expenditure	\$0	\$0	\$0	\$0	\$0
19	<b>Total Expenditures</b>	<b>\$60,000</b>	<b>\$120,000</b>	<b>\$120,000</b>	<b>\$120,000</b>	<b>\$420,000</b>
20	<b>HSA Revenues</b>					
21	General Fund	\$60,000	\$120,000	\$120,000	\$120,000	\$420,000
22						
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$60,000</b>	<b>\$120,000</b>	<b>\$120,000</b>	<b>\$120,000</b>	<b>\$420,000</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	<b>Total Revenues</b>	<b>\$60,000</b>	<b>\$120,000</b>	<b>\$120,000</b>	<b>\$120,000</b>	<b>\$420,000</b>
37	Full Time Equivalent (FTE)	0.57	1.14	1.14	1.14	
39	Prepared by: Jessica Lehman		Telephone No.: 510-427-7535		Date: 12/17/20	
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>10/25/2016</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3										
4	Program: Long-Term Care Consumer Rights Advocacy									
5	(Same as Line 9 on HSA #1)									
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10										
11		Agency Totals		HSA Program		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Executive Director	\$73,046	1.00	9%	0.09	\$4,243	\$6,766	\$6,766	\$6,766	\$24,541
14	Consumer Rights Director	\$53,560	1.00	98%	0.98	\$26,244	\$52,489	\$52,489	\$52,489	\$183,711
15	LTC Supervisor	\$58,686	1.00	7%	0.07	\$2,934	\$3,869	\$3,869	\$3,869	\$14,541
16					-					
17					-					
18					-					
19					-					
20					-					
21					-					
22					-					
23					-					
24					-					
25					-					
26					-					
27					-					
28					-					
29					-					
30	TOTALS	\$185,292	3.00	114%	1.14	\$33,421	\$63,124	\$63,124	\$63,124	\$222,793
31	FRINGE BENEFIT RATE	30%								
32	EMPLOYEE FRINGE BENEFITS	\$55,588				\$10,026	\$18,936	\$18,936	\$18,936	\$66,834
33										
34										
35										
36	TOTAL SALARIES & BENEFITS	\$240,880				\$43,447	\$82,060	\$82,060	\$82,060	\$289,627
37	HSA #2									10/25/2016



## APPENDIX A3 – SCOPE OF SERVICES

### SENIOR AND DISABILITY ACTION SENIOR AND DISABILITY EMPOWERMENT

**January 1, 2021 to June 30, 2024**

#### I. Purpose

The purpose of this grant is to empower older adults and adults with disabilities through a comprehensive overview of community resources and services. Individuals will learn effective public speaking and communication skills. These trainings will help consumers become advocates on their own behalf and to represent the greater older adult and adult with disabilities community as well.

#### II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
CARBON City	Contracts Administration, Reporting and Billing On Line System City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services (previously Department of Aging and Adult Services/DAAS)
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Empowerment	Two training modules: Senior and Disability Survival School and Senior and Disability University. Classes include activities that help participants learn the various components of independent living: accessing essential services, conflict resolution, leadership, facilitating effective meetings, leadership skills, community organizing, diversity training and political advocacy
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Senior and Disability Action (SDA)
HSA	Human Services Agency of the City and County of San Francisco

LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OCP	Office of Community Partnerships (previously Office on the Aging/OOA)
Outreach and Education	The preparation and distribution of materials that inform and advise older adults and adults with disabilities of their housing rights and the opportunities to participate in advocacy coalitions. Efforts will include referrals from former clients, grassroots constituencies, other non-profits, City agencies, as well as direct outreach at tenant gatherings and forums, resource fairs, apartment buildings, and word of mouth, and distributing general flyers at community centers, senior centers, and community-wide festivals.
Semester	An SDA academic session: four class days with a singular curriculum each day.
Senior & Younger Adults with Disabilities Empowerment Advisory Committee.	An advisory committee made up of consumers, older adults and adults living with disabilities and advocates. The Advisory Committee meets regularly with the Senior and Disability Survival School and the Senior and Disability University instructors to review class offerings and provide feedback.
Senior	Person who is 60 years or older, used interchangeably with older adult.
Senior & Disability Survival School	A multi-lingual and culturally diverse four-session class that empowers older adults and persons with disabilities in San Francisco. The school aims to provide students with the information, understanding and resources necessary for independent living.

Senior & Disability University	A multi-lingual and culturally diverse four session class that empowers older adults and persons with disabilities in San Francisco. The school aims to provide students with formal training on how to affect change in the civic/political process through advocacy and volunteerism.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )

### III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited –English speaking
- Minority
- Frail
- LGBTQ+

### IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above, or
- 3) Aged 18 to 59 living with a disability

### V. Location and Time of Services

Senior and Disability Empowerment services are provided at SDA offices and at other settings around the City, as well as online. SDA offices are located at 1360 Mission St., 4th Floor, San Francisco, CA 94103. The hours of operation are 9:00 a.m. to 5 p.m., Monday through Friday.

### VI. Services to be Provided

The purpose of the Empowerment programs is to educate and inform older adult and people with disabilities in understanding and accessing essential services and help them become advocates on behalf of the greater community of which they are apart.

#### **Senior and Disability Survival School**

The Senior and Disability Survival School brings consumer information to older adults and people with disabilities throughout San Francisco. Senior and Disability Survival School trains older adults and adults with disabilities to effectively access vital community resources and to exercise their rights when they do. Classes cover: 1) consumer rights training, 2) healthcare and benefits, 3) transportation, and 4) housing. Each session of the Senior and Disability Survival School includes presentations from a variety of service providers, agency representatives, and

advocates. Classes are offered in several languages: Chinese, English, Russian and Spanish. Classes are free of cost and offered in neighborhoods throughout San Francisco.

**Senior and Disability University**

Senior and Disability University is a leadership training program by and for older adults and people with disabilities in San Francisco. Grantee will prepare students to speak in public, engage in the civic/local government process, and help connect students to the volunteer and advocacy opportunities that will allow them to make a difference in the community. Classes cover 1) public speaking, 2) community organizing skills, 3) leadership development, and 4) empowerment. Classes are offered in several languages: Chinese, English, Russian and Spanish. Classes are free of cost and offered in neighborhoods throughout San Francisco.

In conjunction with both Empowerment Programs, Grantee convenes the Empowerment Leadership Group. Its purpose is to steer the direction of the empowerment programs by providing feedback, suggesting class topics and locations and helping with outreach, set-up, and facilitation. Members of the Leadership Group are community representatives, older adults and people with disabilities themselves, and they play a role in planning or facilitating classes. They take part in at least one semester each and meet as a group at least once a year..

**VII. Units of Service Definitions**

**Senior and Disability Survival School**

- 1) Grantee will provide Senior and Disability Survival School classes. A unit is one class day, between 1.5 hours online and 3 hours in person. Classes can be part of a larger ‘semester’ long curriculum or one-day classes provided at and tailored to community partner requests.

UNIT: one class day

- 2) Grantee will maintain a minimum of number of students for Senior and Disability Survival School to achieve annual goal.

UNIT: one student

- 3) Grantee will recruit and support members of the Empowerment Leadership Group.

UNIT: one group member.

### **Senior and Disability University**

- 1) Grantee will provide classes as part of the Senior and Disability University. A unit is generally one 3-hour class day in person or 1.5 to 2 hours online. Classes can be part of larger 'semester' long curriculum or one-day classes provided at and tailored to community partner requests.

UNIT: one class day.

- 2) Grantee will maintain a minimum of number of students for Senior and Disability University to achieve annual goal.

UNIT: one student

### **VIII. Service Objectives**

On an annual basis:

- Grantee will recruit, train and engage at least 16 volunteers for advocacy efforts.

### **Senior and Disability Survival School**

On an annual basis:

- Grantee will serve at least **125** unduplicated consumers.
- Grantee will provide at least **16** class days.
- Grantee will maintain an average of at least **15** students per semester.
- Grantee will work with at least **5** community members as part of the Empowerment Leadership Group.

### **Senior and Disability University**

On an annual basis:

- Grantee will serve at least **100** unduplicated consumers.
- Grantee will provide at least **16** class days.
- Grantee will maintain an average of at least **15** students per semester.
- Grantee will work with at least **3** community members as part of the Empowerment Leadership Group

### **IX. Outcome Objectives**

#### **Senior and Disability Survival School**

- 1) At least **50%** of the students completing a course evaluation will rate themselves as more proficient in accessing services and more likely to do so.
- 2) At least **85%** of consumers completing a course evaluation will report satisfaction with their educational experience.
- 3) At least **20%** of the students of the Senior & Disability Survival School will volunteer or express interest in joining a community organization or will participate in a community meeting or public hearing.

**Senior and Disability University**

- 4) At least **75%** of the students completing course evaluation will report feeling more comfortable speaking in public and express a willingness to do so.
- 5) At least **85%** of consumers completing a course evaluation will report satisfaction with their educational experience.
- 6) At least **90%** of participants will practice public speaking.
- 7) At least **20%** of the students will volunteer or express interest in joining a community organization or will participate in a public policy process during the contract year.

**X. Reporting and Other Requirements**

Grantee will provide various reports during the term of the grant agreement.

- 1) Grantee will enter CA GetCare the consumer data including the Intake Form by the required due date as specified by the OCP.
- 2) The grantee will enter the CA Getcare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- 3) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the Service Objectives.
- 4) Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis.
- 5) Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- 6) Grantee will provide a summary of course evaluations to OCP by March 15 each grant year. Response rate will be at least 50% of contracted unduplicated consumers.
- 7) Grantee shall develop and deliver ad hoc reports as requested by DAS and/or HSA.
- 8) Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Rick Appleby  
Program Analyst  
DAS, Office of Community Partnerships  
PO Box 7988  
San Francisco, CA 94120  
[rick.appleby@sfgov.org](mailto:rick.appleby@sfgov.org)

Steve Kim  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
[steve.kim@sfgov.org](mailto:steve.kim@sfgov.org)

## **XI. Monitoring Activities**

- 1) Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VIII & IX, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
  
- 2) Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name			Term		
6	<b>Senior and Disability Action</b>			1/1/21-6/30/24		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.			No. of Mod.		
9	<b>Program: Older Adults &amp; Adults with Disability Empowerment</b>					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$72,680	\$145,363	\$145,363	\$145,363	\$508,769
14	Operating Expense	\$18,624	\$37,246	\$37,246	\$37,246	\$130,362
15	<b>Subtotal</b>	<b>\$91,304</b>	<b>\$182,609</b>	<b>\$182,609</b>	<b>\$182,609</b>	<b>\$639,131</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$13,696	\$27,391	\$27,391	\$27,391	\$95,870
18	Capital Expenditure	\$0	\$0	\$0	\$0	\$0
19	<b>Total Expenditures</b>	<b>\$105,000</b>	<b>\$210,000</b>	<b>\$210,000</b>	<b>\$210,000</b>	<b>\$735,000</b>
20	<b>HSA Revenues</b>					
21	General Fund	\$105,000	\$210,000	\$210,000	\$210,000	\$735,000
22						
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$105,000</b>	<b>\$210,000</b>	<b>\$210,000</b>	<b>\$210,000</b>	<b>\$735,000</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	<b>Total Revenues</b>	<b>\$105,000</b>	<b>\$210,000</b>	<b>\$210,000</b>	<b>\$210,000</b>	<b>\$735,000</b>
37	Full Time Equivalent (FTE)	1.13	2.26	2.26	2.26	
39	Prepared by: Jessica Lehman		Telephone No.: 510-427-7535		Date: 12/17/20	
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>10/25/2016</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3										
4	Program: Older Adults & Adults with Disability Empowerment									
5	(Same as Line 9 on HSA #1)									
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10										
11		Agency Totals		HSA Program		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Executive Director	\$73,046	1.00	8%	0.08	\$4,383	\$5,766	\$5,766	\$5,766	\$21,681
14	SDU Educator	\$61,108	1.00	37%	0.37	\$13,749	\$22,499	\$22,499	\$22,499	\$81,246
15	SDU Organizer	\$53,560	1.00	96%	0.96	\$21,709	\$51,418	\$51,418	\$51,418	\$175,963
16	SDSS Organizer	\$26,780	1.00	50%	0.50	\$6,695	\$13,390	\$13,390	\$13,390	\$46,865
17	SDU-Housing Organizer	\$53,560	1.00	35%	0.35	\$9,373	\$18,746	\$18,746	\$18,746	\$65,611
18					-					
19					-					
20					-					
21					-					
22					-					
23					-					
24					-					
25					-					
26					-					
27					-					
28					-					
29					-					
30	TOTALS	\$268,054.00	5.00	226%	2.26	\$55,909	\$111,819	\$111,819	\$111,819	\$391,366
31										
32	FRINGE BENEFIT RATE	30%								
33	EMPLOYEE FRINGE BENEFITS	\$80,416				\$16,771	\$33,544	\$33,544	\$33,544	\$117,403
34										
35										
36	TOTAL SALARIES & BENEFITS	\$348,470				\$72,680	\$145,363	\$145,363	\$145,363	\$508,769
37	HSA #2									10/25/2016

