



Edwin M. Lee, Mayor

Trent Rhorer, Executive Director

MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: MELISSA MCGEE, INTERIM DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *JKT*

DATE: JUNE 16, 2016

SUBJECT: GRANT RENEWAL: **INDEPENDENT LIVING RESOURCE CENTER OF SAN FRANCISCO (ILRCSF)** (NON-PROFIT) TO PROVIDE LEGAL SERVICES FOR YOUNGER ADULTS WITH DISABILITIES

	<u>Current</u>	<u>Renewal</u>	<u>Contingency</u>	<u>Total</u>	
GRANT TERM:	7/1/15-6/30/16	7/1/16-6/30/18			
GRANT AMOUNT:	\$87,125	\$178,500	\$17,850	\$196,350	
ANNUAL AMOUNT:	<u>FY 16/17</u> \$89,250	<u>FY 17/18</u> \$89,250			
	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$178,500			\$17,850	\$196,350
PERCENTAGE:	100%			10%	100%

The Department of Aging & Adult Services (DAAS) requests authorization to renew the grant agreement with the Independent Living Resource Center of San Francisco (ILRCSF) for the period from July 1, 2016 through June 30, 2018, in the amount of \$178,500 plus a 10% contingency for a total amount not to exceed \$196,350. The purpose of the grant is to ensure the rights and entitlements of younger adults with disabilities by providing or securing legal services.

Background

While the Older Americans Act provides Title III B funding for Senior Legal Services, DAAS recognized the need to provide younger adults with disabilities access to legal services. Legal services and

intervention are critical to maintaining or securing a better quality of life affecting seniors and adults with disabilities. Legal services help younger adults with disabilities remain safely in the community and out of institutions.

Within the past year, the Independent Living Resource Center of San Francisco (ILRCSF) has created and successfully maintained a legal unit within its existing independent living center. ILRCSF's mission is to ensure that people with disabilities are full social and economic partners, both within their families and in a fully accessible community.

Services to be Provided

The Grantee will provide legal services to eligible consumers who are residents of San Francisco and aged 18 to 59 living with a disability. Legal services offered primarily focus on public benefits, including disability determinations, appeals, and technical assistance. Other services may include (but are not limited to) consumer/fraud issues, disability planning and advance directives, and simple will preparation as resources may allow.

In addition, the Grantee will keep up with changes in legislation on a myriad of issues that affect adults with disabilities. The Grantee will remain experienced and knowledgeable about working with adults with disabilities. They will also remain culturally and linguistically competent to serve an ethnically diverse population.

Services are delivered at 825 Howard Street, San Francisco. Time of Services: Monday – Friday from the hours of 9:00 am to 4:30 pm (or by appointment).

Performance

Fiscal Monitoring

As part of the citywide joint fiscal and compliance monitoring, the Independent Living Resource Center of San Francisco was selected for monitoring during FY 15-16. The monitoring site visit was led by staff from the Mayor's Office of Housing and Community Development in March of 2016. A report on the monitoring results has not been issued as of yet.

Program Monitoring

Program Monitoring for the Independent Living Resource Center of San Francisco was conducted in May of 2016 by Department of Aging and Adult Services staff. ILRCSF's performance has been excellent and they have exceeded their service units for the current year.

Selection

Grantee was selected through Request for Proposals #635 (Consumer Advocacy Services for Seniors and Younger Adults with Disabilities), which was competitively bid in February 2015.

Funding

Funding for these services will be provided through County General Funds.

Attachments

Appendix A – Services to be Provided by Grantee

Appendix B – Program Budget

APPENDIX A – Services to be Provided by Grantee

INDEPENDENT LIVING RESOURCE CENTER – SAN FRANCISCO

Effective July 1, 2016 to June 30, 2018

LEGAL SERVICES FOR YOUNGER ADULTS WITH DISABILITIES

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of younger adults with disabilities by providing or securing legal services.

II. Definitions

HSA Human Services Agency of City and County of San Francisco

DAAS Department of Aging and Adult Services

Grantee Independent Living Resource Center San Francisco

Adult with Disability Person 18 years of age or older living with a disability.

Legal Services To provide services to a senior or an adult with disabilities for legal advice, counseling and/or representation by an attorney, or other person acting under the supervision of an attorney.

California State Bar The State Bar of California is the regulatory agency for the state's lawyers, charged with admitting and disciplining attorneys.

Legal Services Program The scope of services shall include:
(1) Research, advice and counseling regarding legal rights
(2) Representation before courts, administrative agencies, and other government bodies
(3) Assistance in dispute resolution, including negotiation
(4) Drafting of legal documents
(5) Assistance in securing alternative legal assistance or other appropriate services
(6) Technical assistance to advocates on legal questions regarding legal rights of older persons or person with disabilities

III. Target Population

Individuals between 18 and 59 years of age that are living with disabilities. According to the federal mandates of the Older Americans Act, services must target clients who are

members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited –English speaking
- Minority
- Frail
- LGBT

IV. Eligibility for Legal Services

- 1) A resident of San Francisco
- 2) Aged 18 to 59 living with a disability*

*It will be a best practice to allow the consumer to self-identify to the extent possible. However, should there be a case where the consumer’s disability status based solely on self-identification is in question, additional verification may be requested. The Grantee will be permitted to ask the consumer to provide any one of the following items: a) Disabled Transit Identification card; b) Medi-Care card; c) Social Security Disability Insurance card, or, as a last resort, d) Medical verification.

V. Location and Time of Services

Services are delivered at 825 Howard Street, San Francisco. Time of Services: Monday – Friday from the hours of 9:00 am to 4:30 pm (or by appointment).

VI. Description of Services

The Legal Services program providers help eligible consumers with, but not limited to, benefit appeals, eviction prevention, consumer fraud/issues, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and intervention is critical to maintaining or securing a better quality of life affecting seniors and adults with disabilities. Legal service program providers work in conjunction with other service providers to carefully assess and triage consumer needs.

Consumers contacting legal services go through an initial screening process. In general, senior legal providers categorize the service they give into the following four modules:

1. Information and Referral – the consumer concern is more appropriately referred to another service for assistance.
2. Advise and Close – the consumer issue is very easily addressed, advice is provided and the case is closed
3. Brief Services – the consumer is in need of assistance to prepare legal correspondence, fill out an official form, review of legal documents, etc.
4. Case Acceptance – the consumer issue warrants more extensive legal representation and a case file is opened, i.e., consumer fraud, challenging eviction petitions, etc.

This program geared to younger disabled adults will entail a comprehensive outreach effort to inform the community of the availability of this new service. The Grantee has agreed to hold sessions with existing community groups and agencies currently serving the persons living with a disability population in an effort to best design a service model that meets the needs of younger disabled adults.

In addition, Legal Service providers keep up with changes in legislation on a myriad of issues that affect seniors and adults with disabilities.

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an older adult and adult with disability population. To the best of its ability, the providers are also culturally and linguistically competent to serve an ethnically diverse population.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service issues.

Other expectations include:

1. To maintain various areas of legal expertise relevant to seniors and/or persons living with disabilities. Areas of expertise include but are not limited to:
 - a) eviction assistance/prevention
 - b) homelessness/lack of housing/fair housing
 - c) benefits appeals
 - d) simple wills
 - e) consumer issues/fraud
 - f) immigration/naturalization issues
 - g) elder abuse prevention
 - h) planning for disability/advance directives
 - i) debt collection
2. Provide quality legal services to seniors and adults with disabilities wherein consumer needs are met or satisfactorily resolved.

VII. Service Objectives

On an annual basis:

- Grantee will serve a minimum of **110** unduplicated consumers (younger adults with disabilities).
- Grantee will provide a minimum of **1,095** units of service of legal assistance. Legal assistance includes providing legal information, advice, counseling, administrative representation, and judicial representation to an individual or to a group by a member of

the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar. A unit is one hour of legal assistance.

VII. Outcome Objectives

1. At least **10%** of consumers assisted will complete the consumer satisfaction surveys.
2. At least **85%** of consumers assisted in the above-listed areas of expertise will be satisfied with the service provided.
3. At least **85%** of consumers surveyed, consumers assisted with legal services (where a case is opened and closed), will be satisfied of the resolution provided by the legal counselor within the contract period.

VIII. Reporting Requirements

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

- A. 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.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
 1. Number of unduplicated consumers 18 years of age and older with a disability served during the month.
 2. Number of units of legal assistance services provided during the month.
- C. 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.
- D. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year.
- E. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA.

- G. 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:

Michael Zaugg, Program Analyst
DAAS, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120-7988
(415) 355-6790

michael.zaugg@sfgov.org

Rocio Duenas, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
(415) 355-3619

rocio.duenas@sfgov.org

X. Monitoring Activities

- A. 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, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OOA 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 VI and VII.
- B. 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
1				Appendix B, Page 1
2				Document Date: 6/8/16
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Independent Living Resource Center of San Francisco			Term
6				7/1/2016- 6/30/2018
7	(Check One) New ___ Renewal <input checked="" type="checkbox"/> Modification ___			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Legal Services - YAD			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/2016 - 6/30/2017	7/1/2017 - 6/30/2018	Total 7/1/2016-6/30/18
12	Expenditures			
13	Salaries & Benefits	\$55,369	\$55,369	\$110,738
14	Operating Expense	\$22,571	\$22,571	\$45,142
15	Subtotal	\$77,940	\$77,940	\$155,880
16	Indirect Percentage (%)	14.5%	14.5%	\$0
17	Indirect Cost (Line 16 X Line 15)	\$11,310	\$11,310	\$22,620
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$89,250	\$89,250	\$178,500
20	HSA Revenues			
21	General Fund	\$89,250	\$89,250	\$178,500
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$89,250	\$89,250	\$178,500
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$89,250	\$89,250	\$178,500
37	Full Time Equivalent (FTE)			
39	Prepared by: Shelby Malvosio		Telephone No.: 415-543-6222	
40	HSA-CO Review Signature: _____			
41	HSA #1			11/15/2007

Program Name: Legal Services - YAD
 (Same as Line 9 on HSA #1)

Salaries & Benefits Detail

	A	B	C	D	E	F	G	H
1								
2								
3								
4	Program Name: Legal Services - YAD							
5	(Same as Line 9 on HSA #1)							
6								
7								
8								
9								
10								
11		Agency Totals		For HSA Program		For DHS Program	For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	7/1/2016 - 6/30/2017	7/1/2017 - 6/30/2018	7/1/16 to 6/30/18
13	Attorney	\$70,000	100%	60%	60%	\$42,000	\$42,000	\$84,000
14	Executive Director	\$100,502	100%	1%	1%	\$1,005	\$1,005	\$2,010
15	Community Coordinator	\$56,650	100%	1%	1%	\$567	\$567	\$1,134
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS		3.00	0.62	0.62	\$43,572	\$43,572	\$87,144
31								
32	FRINGE BENEFIT RATE	27%						
33	EMPLOYEE FRINGE BENEFITS					\$11,797	\$11,797	\$23,594
34								
35								
36	TOTAL SALARIES & BENEFITS	\$0				\$55,369	\$55,369	\$110,738
37	HSA #2	11/15/2007						

	A	B	C	D	E	F	G	H	I
1									
2									
3									
4	Program Name: Legal Services - YAD								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11									TOTAL
12	Expenditure Category		TERM		7/1/2016 - 6/30/2017		7/1/2017 - 6/30/2018		7/1/16-6/30/18
13	Rental of Property				\$9,988		\$9,988		\$19,976
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$2,945		\$2,945		\$5,890
15	Office Supplies, Postage				\$191		\$191		\$382
16	Building Maintenance Supplies and Repair								
17	Printing and Reproduction				\$61		\$61		\$122
18	Insurance (Malpractice)				\$3,218		\$3,218		\$6,436
19	Staff Training				\$2,435		\$2,435		\$4,870
20	Staff Travel-(Local & Out of Town)				\$30		\$30		\$60
21	Rental of Equipment & Software				\$1,486		\$1,486		\$2,972
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23	Language Line				\$731		\$731		\$1,462
24	IT Services				\$444		\$444		\$888
25									
26									
27									
28	OTHER								
29	Publication and membership dues				\$921		\$921		\$1,842
30	Food for client meetings				\$30		\$30		\$60
31	Outreach & Education				\$91		\$91		\$182
32									
33									
34									
35	TOTAL OPERATING EXPENSE				\$22,571		\$22,571		\$45,142
36									
37	HSA #3								11/15/2007