



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

Department of Benefits  
and Family Support

**MEMORANDUM**

Department of Disability  
and Aging Services

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** KELLY DEARMAN, EXECUTIVE DIRECTOR

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

**DATE:** APRIL 5, 2023

**SUBJECT:** GRANT MODIFICATION: **FELTON INSTITUTE (NON-PROFIT)** FOR PROVISION OF THE LONG-TERM CARE OMBUDSMAN PROGRAM

DS  
EE

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



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
<b>GRANT TERM:</b>	07/01/21- 06/30/25	04/01/23- 6/30/23	07/01/21- 06/30/25		
<b>GRANT AMOUNT:</b>	\$3,176,800	\$23,661	\$3,200,461	\$320,046	\$3,520,507
<b>ANNUAL AMOUNT:</b>	<u>FY 21/22</u>	<u>FY 22/23</u>	<u>FY 23/24</u>	<u>FY24/25</u>	
	\$786,955	\$820,276	\$796,615	\$796,615	
<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
	\$2,168,799	\$760,375	\$271,287	\$320,046	\$3,520,507
<b>FUNDING PERCENTAGE:</b>	68%	24%	8%		100%

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant agreement with Felton Institute for the period of April 1, 2023 through June 30, 2023, in the additional amount of \$23,661 plus a 10% contingency for a revised total amount not to exceed \$3,520,507. The purpose of this modification is to add additional California Department of Aging (CDA) area plan funds for the current fiscal year.



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**Background**

An Ombudsman is an official appointed to investigate individuals' complaints against maladministration. The Long-Term Care Ombudsman Program (LTCOP) was established and mandated by the federal Older American's Act and the Older Californian's Act to serve as a resource and advocate for residents of long-term care (LTC) facilities. Long-term care facilities include skilled nursing facilities (SNF) and residential care facilities for the elderly (RCFE). (RCFEs are also commonly known as 'board and care' or assisted living homes.)

The LTCOP in California includes a State Ombudsman program, which is part of the California Department of Aging (CDA). Each of the 33 Area Agencies on Aging in the State of California has their own local Long-Term Care Ombudsman program.

**Services to be Provided**

Residents living in long-term care facilities have rights that are guaranteed by federal and state regulations. The LTCOP will work to protect and promote these rights by providing services, which include:

- Receiving, investigating, and resolving complaints submitted by, or on behalf of, residents of long-term care facilities
- Ensuring a regular presence in long-term care facilities
- Identifying and addressing patterns of poor practices in long-term care facilities

LTCOP services also include a public education and advocacy component, with the goal of maximizing community awareness and involvement, influencing public policy, and ensuring effective program administration.

The LTCOP is based at Grantee's offices located at 6221 Geary, 3rd floor in San Francisco. Offices are open Monday through Friday during regular business hours. LTC Ombudsman staff is regularly on site at long-term care facilities to provide program services.

**Modification**

This modification will add additional CDA area plan funding for the current fiscal year. The additional funds will support salary increases to the existing Ombudsman Program staff and a small portion will go to operational costs such as staff training, staff travel, and program outreach. There are no changes to the Appendix A – Services to be Provided.



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**Selection**

Grantee was selected through Request for Proposals #904, which was competitively bid in March of 2021.

**Funding**

Funding for this grant is provided by Local, State, and Federal Funds.

**ATTACHMENTS**

Appendix A, Services to be Provided  
Appendix B-1, Budget

## APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

**Effective July 1, 2021 – June 30, 2025**

**FELTON INSTITUTE**

### LONG -TERM CARE OMBUDSMAN PROGRAM

#### I. Purpose

The purpose of this grant is to improve the quality of life and quality of care of people living in nursing homes, residential care homes, and assisted living facilities by providing access to the Long-Term Care Ombudsman Program. The Ombudsman Program seeks to accomplish this goal by 1) receiving and responding to complaints and issues presented by, or on behalf of residents of long-term care facilities and 2) providing consultation and education on resident rights and good care practices system wide.

#### II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability.
California State Office of the Long-Term Care Ombudsman	Program established and operated by the California Department of Aging (CDA) to carry out the State Long-Term Care Ombudsman Program, both directly and by contract with the local Area Agencies on Aging (AAAs). As a program of CDA, the Ombudsman Program is responsible for activities that promote the development, coordination, and utilization of Ombudsman services. The program analyzes local level performance data, monitors government actions, and provides recommendations pertaining to long-term care facilities and services. The program periodically updates training procedures for local Ombudsman Programs and provides them with administrative and technical assistance.
CARBON	Contracts Administration, Reporting and Billing On Line System
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
Grantee	Felton Institute
HSA	Human Services Agency of City and County of San

	Francisco
Local Ombudsman Program	Usually either a program of the Area Agency on Aging or its subcontractor that is selected to carry out the duties of the State Long-Term Care Ombudsman Program with respect to the planning or service area. The selection is in accordance with policies and procedures established by the State Ombudsman and meet the State Ombudsman's criteria for designation and concurrence.
Long-Term Care (LTC) / Long-Term Care Facility	1) Any nursing or skilled nursing facility, as defined in Section 1250 of the Health and Safety Code, including distinct parts of facilities that are required to comply with licensure requirements for skilled nursing facilities. 2) Any residential care facility for the elderly as defined in Section 1569.2 of the Health and Safety Code.
Low Income	Having income at or below 100% 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.
Older Adult	Person who is 60 years or older, used interchangeably with senior
RCFE	Residential Care Facility for the Elderly
Senior	Person who is 60 years or older, used interchangeably with older adult
SNF	Skilled Nursing Facility
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 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 (Chapter 104, Sections 104.1 through 104.9.)

### III. Eligibility for LTC Ombudsman Services

- 1) Individual living in a long-term care facility (as defined above) in San Francisco
- 2) Legal representative of individual living in a long-term care facility

### IV. Location and Time of Services

The LTC Ombudsman Program is based at Grantee's offices located at 6221 Geary, 3<sup>rd</sup> floor in San Francisco. Offices are open Monday through Friday during regular business hours. LTC Ombudsman staff is regularly on site at long-term care facilities to provide program services.

## **V. Grantee Responsibilities**

The Grantee, in accordance with policies and procedures established by the California Department of Aging and California State LTC Ombudsman, will at minimum:

1. Identify, investigate, and resolve complaints made by, or on behalf of, residents of long-term care facilities that relate to actions, inactions, or decisions of providers or representatives of providers of long-term care services, public agencies, or health and social services agencies that may adversely affect the health, safety, welfare, or rights of residents.
2. Inform residents about the means of obtaining services delivered by long-term care providers and organizations in their communities.
3. Provide witnessing services for advance health care directives.
4. Ensure that residents have regular and timely access to the services provided through the LTC Ombudsman Program and that the residents or other complainants receive timely responses from representatives of the LTC Ombudsman Program.
5. Represent the interests of the residents before governmental agencies and seek administrative, legal, and other remedies to protect the health, safety, welfare, and rights of the residents.
6. Recommend changes to relevant laws, regulations, policies, or actions as needed. This may include providing information that the Ombudsman Program determines to be necessary to public and private agencies, legislators, and other persons, regarding the problems and concerns of residents of long-term care facilities and recommendations relating to resolving these problems and concerns.
7. Develop internal policies and procedures for recruitment, training, and retention of LTC Ombudsman certified volunteers.
8. Ensure that all LTC Ombudsman Program services are free and confidential.
9. Meet all requirements as established and requested by the California Department of Aging and State of California LTC Ombudsman Program for the operation of a local LTC Ombudsman Program.

## **VI. Units of Service and Definitions**

During the term of the grant, the Grantee will record program performance in the following areas for the purpose of determining the extent and impact of services delivered:

### **1) Unduplicated Consumer**

An individual who is eligible for and receives Ombudsman services.

UNIT: One Unduplicated Consumer

**2) Complaint/Abuse Investigation and Facility Monitoring**

Activities related to receiving, verifying, investigating, or resolving a complaint. Time related to the delivery of this service includes all hours spent in facilities by staff or volunteers, traveling to and from facilities and completing required records.

UNIT: One Hour

**3) Work with Resident Councils**

LTC Ombudsman Program staff or volunteer participation in Resident Council meetings at LTC facilities. LTC Ombudsman Program will provide information or instruction to Resident Council about the LTC Ombudsman Program or LTC issues.

UNIT: One Resident Council Meeting Attended

**4) Work with Family Councils**

LTC Ombudsman Program staff or volunteer participation in Family Council meetings at LTC facilities. LTC Ombudsman Program will provide information or instruction to Family Council about the LTC Ombudsman Program or LTC issues.

UNIT: One Family Council Meeting Attended

**5) Consultation to Facilities**

Count of instances of LTC Ombudsman staff or volunteer interactions with facility staff for the purpose of providing general information and assistance unrelated to a complaint. May be accomplished by telephone, letter, email, fax, or in person.

UNIT: One Consultation

**6) Information and Consultation to Individuals**

Count of instances of LTC Ombudsman staff or volunteer interactions with residents, family members, friends, and others in the community for the purpose of providing general information and assistance unrelated to a complaint. Consultation may be accomplished by telephone, letter, email, fax, or in person.

UNIT: One Consultation

**7) Community Education:**

LTC Ombudsman Program staff or volunteer participation in public events planned to provide information or instruction to community members about the LTC Ombudsman Program or LTC issues. The number of sessions refers to the number of events, not the number of participants.

UNIT: One Session

**8) Facility Coverage – Nursing Facilities (other than in response to a complaint)**

Percentage of nursing facilities within the service area (San Francisco) that were visited by LTC Ombudsman staff or volunteer at least once each quarter not in response to a

complaint. The percentage is determined by dividing the number of nursing facilities in the service area that were visited at least once each quarter, not in response to a complaint, by the total number of nursing facilities in the service area. This is not a count of visits, but a count of facilities. In determining the number of facilities visited for this measure, no nursing facility may be counted more than once.

UNIT: Percentage, as calculated based on formula above.

**9) Facility Coverage – Residential Care Facilities for the Elderly (other than in response to a complaint)**

Percentage of Residential Care Facilities for the Elderly (RCFE) within the service area (San Francisco) that were visited by LTC Ombudsman staff or volunteer at least once each quarter not in response to a complaint. The percentage is determined by dividing the number of RCFEs in the service area that were visited at least once each quarter, not in response to a complaint, by the total number of RCFEs in the service area. This is not a count of visits, but a count of facilities. In determining the number of facilities visited for this measure, no RCFE can be counted more than once.

UNIT: Percentage, as calculated based on formula above.

**10) Number of Full-Time (FTE) Equivalent Staff**

This number may only include staff time legitimately charged to the LTC Ombudsman Program. Time spent working for or in other programs may not be included in this number. For example, in a local LTC Ombudsman Program that considers full-time employment to be 40 hours per week, the FTE for a staff member who works in the LTC Ombudsman Program 20 hours a week should be a 0.5 FTE, even if the staff member works an additional 20 hours in another program.

UNIT: Full Time Equivalent (FTE)

**11) Number of Certified LTC Ombudsman Volunteers:**

The utilization of LTC Ombudsman volunteers is essential to completing the program mission. Grantee will recruit and train volunteers to assist with program function. Volunteers will meet the initial and ongoing training requirements as established by the California State LTC Ombudsman Program for certified volunteer status.

UNIT: One Certified LTC Ombudsman Volunteer

**VII. Service Objectives**

On an annual basis:

- Grantee will attend at least **35** Resident Council meetings
- Grantee will attend at least **26** Family Council meetings
- Grantee will provide at least **500** consultations to facilities
- Grantee will provide at least **600** consultations to individuals
- Grantee will participate in at least **10** community education events



- Grantee will meet a minimum **100%** for nursing facility coverage.
- Grantee will meet a minimum **75%** for RCFE facility coverage
- Grantee will maintain a minimum **7.65** FTE equivalent for the LTC Ombudsman Program
- Grantee will recruit, train, and maintain at least **20** certified LTC Ombudsman volunteers

In addition, on an annual basis, Grantee will report:

- Total number of unduplicated consumers receiving LTC Ombudsman services
- Total hours of complaint/abuse investigation and facility monitoring

## **VIII. Outcome Objectives**

- On an annual basis, LTC Ombudsman Program will demonstrate a complaint resolution rate of **78% or above**. (Complaint resolution rate is calculated as follows: number of complaints resolved plus number of complaints partially resolved divided by total number of complaints received.)
  - Complaint Resolution = The complaint was addressed to the resident's satisfaction. If the resident cannot communicate their satisfaction, the Ombudsman may look to the resident's representative or to the complainant to determine if addressed to their satisfaction. In cases where the resident is not the complainant and the resident is deceased, a complaint may be considered resolved if addressed to the satisfaction of the complainant.

## **IX. Reporting Requirements**

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

- A. Grantee shall input all required data into the State Ombudsman Data Integration Network (ODIN) and National Ombudsman Reporting System (NORS) databases as required for Local Ombudsman Program.
- B. Grantee is also responsible for providing reports as scheduled and requested by the California Department of Aging, ensuring that copies are shared with Office of Community Partnerships program analyst.
- 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 31st.
- D. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCF and Contracts Department staff.
- 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 a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.

H. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP staff.

I. Grantee will assure that services delivered are consistent with professional standards for this service.

J. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.

K. Grantee will develop a Grievance Policy consistent with Office on the Aging (Office of Community Partnerships) Program Memorandum #33 - Consumer Grievance Policy.

L. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults connect to services throughout the City. These “Designated Community Focal Points” are:

<b>Name</b>	<b>Address</b>	<b>Phone</b>
Western Addition Senior Center	1390 ½ Turk St, SF, CA 94115	415-921-7805
Bayview Senior Center	5600 3 <sup>rd</sup> St, SF, CA 94124	415-647-5353
OMI Senior Center (CCCYO)	65 Beverly St, SF, CA 94132	415-335-5558
Richmond Senior Center (GGSS)	6221 Geary Blvd, SF, CA 94121	415-404-2938
30 <sup>th</sup> Street Senior Center (On-Lok)	225 30 <sup>th</sup> St, SF, CA 94131	415-550-2221
Openhouse	1800 Market St., SF, CA 94102	415-347-8509
San Francisco Senior Center (SFSC)	481 O’Farrell St, SF, CA 94102	415-202-2983
Aquatic Park Senior Center (SFSC)	890 Beach St, SF, CA 94109	415-202-2983
South Sunset Senior Center (SHE)	2601 40 <sup>th</sup> St, SF, CA 94116	415-566-2845
Geen Mun Activity Center (SHE)	777 Stockton St, SF, CA 94108	415-438-9804
Toolworks	25 Kearney St, SF, CA 94108	415-733-0990
DAS Benefits and Resource Hub	2 Gough St, SF, CA 94103	415-355-6700

M. For assistance with reporting requirements or submission of reports, please contact:

Melissa McGee  
 DAS  
 P.O. Box 7988  
 San Francisco, CA 94120-7988  
[Melissa.mcgee@sfgov.org](mailto:Melissa.mcgee@sfgov.org)

and

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**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 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 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, and HIPAA compliance.

	A	B	E	F	G	H	I	J	K
1	Appendix B-1, Page								3/17/2023
2	Date:3/17/2023								
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>								
4									
5	<b>Name:</b>								
6	<b>Felton Institute</b>								
7	(Check One):    New    Renewal    Modification X								
8	If modification, Effective date of Mod. 4/1/23    No. of modification 1								
9	<b>Program: Long-Term Care Ombudsman Services program</b>								
10	<b>Budget Ref. Page(s):</b>								
11	<b>Program Term:</b>	<b>7/1/21-6/30/22</b>	<b>7/1/22-6/30/23</b>	<b>Modification</b>	<b>Revised</b>	<b>7/1/23-6/30/24</b>	<b>7/1/24-6/30/25</b>	<b>7/1/21-6/30/25</b>	
13	<b>Expenditures</b>								
14	Salaries & Benefits	\$558,595	\$ 572,923	\$ 31,218	\$ 604,142	\$572,923	\$572,923	\$2,308,583	
15	Operating Expenses	\$84,564	\$ 70,349	\$ 2,921	\$ 73,270	\$70,349	\$70,349	\$298,532	
16	<b>Subtotal</b>	<b>\$643,159</b>	<b>\$ 643,272</b>	<b>\$ 34,139</b>	<b>\$ 677,412</b>	<b>\$643,272</b>	<b>\$643,272</b>	<b>\$2,607,115</b>	
17	Indirect Percentage	15%	15%	15%	15%	15%	15%	15%	
18	Indirect Cost	\$96,454	\$ 96,493	\$ 5,122	\$ 101,613	\$96,493	\$96,493	\$391,053	
19	Capital/Subcontractor Expenditures	\$47,342	\$ 56,850	\$ (15,600)	\$ 41,250	\$56,850	\$56,850	\$202,292	
20									
21	<b>Total Expenditures</b>	<b>\$786,955</b>	<b>\$ 796,615</b>	<b>\$ 23,661</b>	<b>\$ 820,276</b>	<b>\$796,615</b>	<b>\$796,615</b>	<b>\$3,200,461</b>	
22									
23	<b>HSA Revenues</b>								
24	General Funds (66%)	\$518,157	\$551,135	\$ (2,763)	\$548,372	\$551,135	\$551,135	\$2,168,799	
25	State Funds (25%)	\$201,850	\$180,500	\$17,025	\$197,525	\$180,500	\$180,500	\$760,375	
26	Federal Funds (CFDA 93.044 & 93.042) (9%)	\$66,948	\$64,980	\$9,399	\$74,379	\$64,980	\$64,980	\$271,287	
27									
28	<b>Subtotal</b>	<b>\$786,955</b>	<b>\$796,615</b>	<b>\$23,661</b>	<b>\$820,276</b>	<b>\$796,615</b>	<b>\$796,615</b>	<b>\$3,200,461</b>	
29	<b>Other Revenues</b>								
30									
31									
32									
33	<b>Subtotal</b>								
35	<b>Total Revenues</b>	<b>\$786,955</b>	<b>\$796,615</b>	<b>\$23,661</b>	<b>\$820,276</b>	<b>\$796,615</b>	<b>\$796,615</b>	<b>\$3,200,461</b>	
37	<b>Full Time Equivalent (FTE)</b>								
38									
39	<b>Prepared by:</b> Ray Mallett, Finance Director								
40									
41	<b>HSA-CO Review Signature:</b>								
42									
43	<b>HSA #1</b>								

A	B	D	E	F	J	K	L	M	N	O	P	
1	Program: Long-Term Care Ombudsman											
2	Services program											
3	(Same as Line 9 on HSA #1)											
4	30.77											
5	Salaries & Benefits Detail											
6												
7												
8												
9												
10		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	Modification 7/1/22-6/30/23	Revised 7/1/22-6/30/23	7/1/23-6/30/24	7/1/24-6/30/25	TOTAL 7/1/21-6/30/25
	POSITION TITLE	Annual Full Time Salary FTE	Total FTE	HSA Funded FTE%	Adjusted FTE							
11	Senior Division Director	\$155,000	1.00	5%	0.05	\$7,750	\$7,750		\$7,750	\$7,750	\$7,750	\$31,000
12	Program Director	\$83,417	1.00	100%	1.00	\$81,500	\$81,500	\$1,917	\$83,417	\$81,500	\$81,500	\$327,917
13	Program co-Director	\$80,833	1.00	100%	1.00	\$75,000	\$72,500	\$8,333	\$80,833	\$72,500	\$72,500	\$300,833
14	Field Services Coordinator/Volunteer Manager	\$75,833	1.00	100%	1.00	\$68,500	\$68,500	\$7,333	\$75,833	\$68,500	\$68,500	\$281,333
15	Residential Care/Transition Advocate	\$65,000	1.00	100%	1.00	\$65,000	\$65,000	-\$3,750	\$61,250	\$65,000	\$65,000	\$256,250
16	Ombudsman Specialist / Abuse Investigator	\$60,000	1.00	100%	1.00	\$60,000	\$60,000	-\$7,250	\$52,750	\$60,000	\$60,000	\$232,750
17	Language-specific Ombudsman/Cantonese	\$70,433	1.00	100%	1.00	\$55,000	\$65,000	\$5,433	\$70,433	\$65,000	\$65,000	\$255,433
18	Administrative assistant	\$58,500	0.60	100%	0.60	\$17,550	\$20,494	\$12,000	\$32,494	\$20,494	\$20,494	\$91,032
19												
20	Total Salaries/Wages	\$649,016	7.60	705%	6.65	\$430,300	\$440,744	\$24,016	\$464,760	\$440,744	\$440,744	\$1,776,548
21												
22	Fringe Benefit Rate	30%										
23	Total Employee Fringe Benefits	\$194,640				\$128,295	\$132,179	\$7,202	\$139,382	\$132,179	\$132,179	\$532,035
24												
25												
26	Total Salaries/Wages/Benefits	\$843,656				\$558,595	\$572,923	\$31,218	\$604,142	\$572,923	\$572,923	\$2,308,583
27												
28	HSA #2											

	A	B	C	D	E	H	I	J	K	L	M	N
1												Appendix B-1, Page 3
2	Program: Long-Term Care Ombudsman Services program											Date: 3/17/2023
3	(Same as Line 9 on HSA #1)											
4												
5												
6												
7												
8	<b>EXPENDITURE CATEGORY</b>							Modification 7/1/22-6/30/23	Revised 7/1/22-6/30/23			<b>TOTAL</b> 7/1/21-6/30/25
9	Rental of Property	\$37,000	\$35,909						\$35,909	\$35,909	\$35,909	\$144,727
10	Utilities(Elec, Water, Gas, Phone, Garbage)	\$6,034	\$6,034						\$6,034	\$6,034	\$6,034	\$24,136
11	Office Supplies, Postage	\$4,500	\$5,173						\$5,173	\$5,173	\$5,173	\$20,019
12	Building Maintenance Supplies and Repair	\$800	\$800						\$800	\$800	\$800	\$3,200
13	Printing and Reproduction	\$2,700	\$2,700						\$2,700	\$2,700	\$2,700	\$10,800
14	Insurance	\$3,600	\$3,433						\$3,433	\$3,433	\$3,433	\$13,899
15	Staff Training	\$3,000	\$1,500		\$1,000			\$2,500	\$1,500	\$1,500	\$1,500	\$8,500
16	Staff Travel-(Local & Out of Town)	\$4,500	\$4,000		\$421			\$4,421	\$4,000	\$4,000	\$4,000	\$16,921
17	Rental of Equipment	\$1,800	\$1,800						\$1,800	\$1,800	\$1,800	\$7,200
18												
19												
20	<b>OTHER</b>											
21	Volunteer Recruitment and Support	\$5,586	\$6,000						\$6,000	\$6,000	\$6,000	\$23,586
22	Organizational Dues and Conferences	\$2,300	\$1,000		\$1,000			\$2,000	\$1,000	\$1,000	\$1,000	\$6,300
23	Program Related Expenses	\$3,844	\$2,000					\$2,000	\$2,000	\$2,000	\$2,000	\$9,844
24	Program Outreach and Marketing	\$8,900			\$500			\$500				\$9,400
25												
26	<b>TOTAL OPERATING EXPENSE</b>	<b>\$84,564</b>	<b>\$70,349</b>		<b>\$2,921</b>			<b>\$73,270</b>	<b>\$70,349</b>	<b>\$70,349</b>	<b>\$70,349</b>	<b>\$298,532</b>
27												
28	<b>HSA #3</b>											

	A	B	F	G	H	I	J	K	L
1									Appendix B-1, Page
2		Program: Long-Term Care Ombudsman Services program							Date:3/17/2023
3									
4									
5		Program Expenditure Detail							
6									
7		SUBCONTRACTORS							TOTAL
			7/1/21-6/30/22	7/1/22-6/30/23	Modification 7/1/22-6/30/23	Revised 7/1/22-6/30/23	7/1/23-6/30/24	7/1/24-6/30/25	7/1/21-6/30/25
8		(Contractor) Residential Care/Abuse Specialist	\$9,000	\$17,750	(5,500.00)	\$12,250	\$17,750	\$17,750	\$56,750
9		(Contractor) Lead Cantonese/Mandarin-speaking Specialist	\$12,000	\$24,000	(8,000.00)	\$16,000	\$24,000	\$24,000	\$76,000
10		Ombudsman Training Specialist	\$0	\$9,100	(9,100.00)	\$0	\$9,100	\$9,100	\$18,200
11		(Contractor) Cantonese/Mandarin-speaking Specialist	\$4,400	\$6,000	7,000.00	\$13,000	\$6,000	\$6,000	\$29,400
12		Curriculum Developer	\$5,000			\$0			\$5,000
13			\$0				\$0	\$0	\$0
14		Total Subcontractor Cost	\$30,400	\$56,850	(15,600.00)	\$41,250	\$56,850	\$56,850	\$185,350
15									
16		EQUIPMENT / FURNITURE							
17		REMODELING							
18	No.	ITEM/DESCRIPTION							
19		Office furniture desks, credenza, blinds etc., for meeting room	\$2,578						\$2,578
20		2 x Jarvis desks and small cabinets	\$2,766						\$2,766
21		Replacement Desktop PC and monitor and 4 laptop	\$7,075						\$7,075
22		Robopets	\$3,423						\$3,423
23		Provide cell phones for all staff	\$1,100						\$1,100
24									\$0
25			\$16,942						
26		Total Capital/Subcontractor Expenditures	\$47,342	\$56,850	(15,600.00)	\$41,250	\$56,850	\$56,850	\$202,292
27									
28		HSA #4							