



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DATE: MAY 3, 2023 DS
EL

SUBJECT: NEW GRANT: **SELF-HELP FOR THE ELDERLY (NON-PROFIT)** TO PROVIDE A WORKFORCE SUPPORT PROGRAM

GRANT TERM: 7/1/2023-6/30/2027

GRANT AMOUNT:	New	Contingency	Total
	\$1,037,604	\$103,760	\$1,141,364

ANNUAL AMOUNT	<u>FY23/24</u>	<u>FY24/25</u>	<u>FY25/26</u>	<u>FY26/27</u>
	\$259,401	\$259,401	\$259,401	\$259,401

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$1,037,604			\$103,760	\$1,141,364
PERCENTAGE:	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 Self-Help for the Elderly for the time period of July 1, 2023 through June 30, 2027, in an amount of \$1,037,604, plus a 10% contingency for a total amount not to exceed \$1,141,364. The purpose of this grant is to provide a workforce training program for home care workers and/or paid personal caregivers of older adults and/or adults with disabilities living in the City and County of San Francisco.



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Background

The Department of Disability and Aging Services (DAS) is responsible for planning, administering and delivering a variety of services to assist older adults and adults with disabilities and their families. The programs and services aim to maximize self-sufficiency, safety, health and independence so older adults and adults with disabilities may live in the community for as long as possible while maintaining the highest quality of life.

The fiscal year 2017-2018 Dignity Fund Community Needs Assessment (DFCNA) revealed a need for additional training and support for home care workers and/or personal caregivers to ensure a competent caregiver workforce and increase the pool of skilled workers who provide paid care to older adults and adults with disabilities living in their homes and communities in the City. The DFCNA also noted a particular need to strengthen and expand training for home care workers and/or personal caregivers with limited or no English-speaking proficiency. In response to information and recommendations from in the FY17-18 DFCNA, a workforce support program was established in early 2019.

The population of older adults is the fastest growing age group among all residents in the City. It is estimated almost 30% of San Franciscans will be age 60 or older by 2030. As people age, the need for receiving care and support increases significantly. The demand for both formal and informal caregivers is expected to grow substantially over the next decade. In addition, the current nationwide caregiver shortage highlights the importance of having a training program in place to support caregivers at various levels so they can effectively and safely provide home care to their care recipients and loved ones.

Services to be Provided

The grantee will develop and oversee a training program for paid personal caregivers and/or home care workers who provide care to older adults and/or adults with disabilities living in the City and County of San Francisco. The training program will encompass multiple levels of training for paid caregivers and/or home care staff to provide skilled and quality caregiving in home and community based settings. The grantee will focus on reaching individuals who identify as members of the Asian or Pacific Islander community and/or have limited English-speaking proficiency.



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The individuals trained through this program go to work for In-Home Supportive Services (IHSS), home care, home health care, adult day health care, adult social day and respite care. Personal Caregiver Training is a 2-week training program taught by a registered nurse. Four (4) days in total are required with 8 hours' lecture and 8 hours' Vocational ESL per week.

Please refer to attached Appendices A and B for more detailed information regarding service objectives, outcome objectives, and budget.

Selection

Grantee was selected through Request for Proposals #1058, which was competitively bid on January 31, 2023.

Funding

Funding for this grant is provided through County General Funds.

ATTACHMENTS

Appendix A – Services to be Provided

Appendix B – Budget

Appendix A – Services to be Provided
Self-Help for the Elderly
Workforce Support Program
July 1, 2023 – June 30, 2027

I. Purpose of Grant

The purpose of this grant is to provide a workforce training program for home care workers and/or paid personal caregivers of older adults and/or adults with disabilities living in the City and County of San Francisco. A workforce training program will help ensure a competent caregiver workforce and increase the pool of skilled workers who provide paid care to older adults and adults with disabilities living in their homes and communities in the City. The training program will focus on strengthening the competencies of home care workers and/or personal caregivers who have limited English-speaking proficiency and/or who provide care to older adults and/or adults with disabilities with limited English-speaking proficiency.

II. Definitions

Adult with a Disability	A person 18-59 years of age living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing Online System
Caregiver / Caregiver Staff	Adults, 18 years of age or older, who provide in-home care to older adults and/or adults with a disability living in the City
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism
DAS	Department of Disability and Aging Services
DFOAC	Dignity Fund Oversight and Advisory Committee
Dignity Fund	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities
Dignity Fund Community Needs Assessment (DFCNA)	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The findings from each DFCNA inform an allocation plan for the expenditure of the Fund

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
Fund	Dignity Fund
Grantee	TBD
Home Care Worker/s	An adult, 18 years of age or older, who provides in-home care to older adults and/or adults with disability living in the City
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
Limited English-speaking proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language.
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
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older
SFHSA	Human Services Agency of the City and County of San Francisco
Socially Isolated	Having few social relationships and few people to interact with regularly.
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.)
Trainee / Unduplicated Consumer (UDC)	Individuals enrolled in the grantee's training program for caregiver and/or home care staff

III. Target Population

Home care workers and/or paid personal caregivers who provide care to older adults and/or adults with disabilities living the City and County of San Francisco. Target priorities must include personal caregivers and/or home care workers who identify as members of the Asian or Pacific Islander community and who have limited English-speaking proficiency and/or who provide care to older adults and/or adults with disabilities with limited English-speaking proficiency.

Additional target priorities may include the following:

- Paid caregivers and/or home care workers who are older adults and/or adults with disabilities themselves
- Paid caregivers and/or home care workers who provide care to older adults and/or adults with disabilities with one or more of the equity factors identified in the DFCNA (i.e. social isolation, low income, communities of color, LGBTQ+).

IV. Workforce Development Program Enrollment Requirements

A person who is a paid personal caregiver and/or home care worker and provides care to older adults or adults with disabilities living in San Francisco.

V. Description of Services

1. Grantee will develop and oversee a training program for paid personal caregivers and/or home care workers who provide care to older adults and/or adults with disabilities living the City and County of San Francisco.
2. Grantee will develop a training curriculum for the target population that enhances caregiving knowledge and capacity, teaches transferable skills, and includes cultural sensitivity training. The grantee will provide DAS with the curriculum for review prior to starting the training program in fiscal year 2023-24 and at the beginning of each fiscal year thereafter and/or when the grantee makes significant changes to the curriculum.
3. Grantee will offer a comprehensive training program that encompasses multiple levels of training for paid caregivers and/or home care staff to provide skilled and quality caregiving in home and community based settings. The training program will meet the linguistic needs of the trainees and contain a job readiness component that will include, but is not limited to, English proficiency.
4. Grantee will ensure that instructors are qualified and have valid credentials demonstrating their capacity to provide training.
5. Grantee will conduct a pre and post assessment of trainees who enroll and complete the training program. The pre assessment will evaluate the level of

caregiving skills and knowledge a trainee has prior to enrolling in the training program. The post assessment will evaluate the level of skills and knowledge a trainee acquires upon completion of the program. The grantee will provide DAS with a copy of the assessment tool/s prior to use for approval. The grantee will keep documentation and record the pre and post assessment results of each trainee. The grantee will provide the results to DAS.

6. Grantee will have a written and active outreach and recruitment plan to connect with the target population and ensure that the target population priorities are included in the plan.
7. Grantee will track and record the units of service provided through this grant agreement and ensure that units of service provided are not “co-mingled” with other DAS funded programs.
8. Grantee shall ensure adequate and culturally competent paid and volunteer staffing to administer the program, deliver quality training to meet the needs of the target population, and adhere to all DAS program standards.
9. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules as they apply.
10. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAS policy memoranda manual.

VI. Location and Time of Services

Name of Sites	Self-Help for the Elderly	
Service Hours	Monday-Friday 9:00am-5:00pm	
Services	Recruitment/Orientation/ Case Management/ Career Counseling	Caregiver/HHA Training
Addresses	601 Jackson Street, Ground Floor, San Francisco, CA 94133	825 Kearny Street, Second Floor, San Francisco, CA 94133

VII. Service Objectives

On an annual basis, Grantee will meet the following Service Objectives for the Workforce Support Program detailed in Table A below:

Service Objective	Annual Total (FY23/24-FY26/27)
Outreach Hours	192
Number of Trainees Enrolled in the Program	55
Number of Trainees Completing the Program	50

VIII. Outcome Objectives

Outcome Objectives are subject to change as the service delivery model is established and/or modified. Outcome Objectives will be tracked using annual client surveys created by Grantee and distributed, collected, and recorded by Grantee. The annual survey is subject to DAS input and approval. On an annual basis, Grantee will meet the following Outcome Objectives:

1. Trainees will demonstrate an increase in caregiving competencies as evidenced by the pre and post assessment. Target: 80% (Assessment tool/s is subject to DAS approval.)
2. Trainees who complete the training program will report the training program provided useful information that will improve their caregiving abilities. Target: 75%
3. Trainees who complete the training program will report the training program has provided them with additional skills to work more competently in multiple community based long-term care and supportive settings. Target: 75%
4. Trainees who complete the training program will report the program and curriculum addressed the linguistic needs of trainees who have limited English-speaking proficiency. Target: 85%
5. Trainees who complete the training program will report the program and curriculum strengthened their ability to provide care to older adults and/or adults with disabilities with limited English-speaking proficiency. Target: 85%

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V and VI. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers, if applicable, into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAS provided or DAS approved intake form into the CA.GetCare database in accordance to DAS policy.
3. 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.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:

- Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VI and VII, Service Objectives and Outcome Objectives, respectively. 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.
 6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
 7. Grantee will provide an annual satisfaction survey report to DAS by March 15 each grant year or a mutually agreed upon date between DAS and the Grantee.
 8. 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).
 9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAS.

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

Tahir.Shaikh@sfgov.org

Office of Contract Management, HSA

or

Noah.Gallo1@sfgov.org

Administrative Analyst, DAS
Office of Community Partnerships

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer/peer ambassador eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units; sign-in sheets of consumers who participated in services if applicable, progress of service and outcome objectives; how consumer records are collected and maintained if applicable; reporting performance including monthly service unit reports on CA.GetCare, maintenance

Self-Help for the Elderly
Workforce Support Program
FY 23-27

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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS 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; a board of director list and whether services are provided appropriately according to Sections III, IV, V, VI, VII, and VIII.

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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name						Term
Self-Help for the Elderly						7/1/23 - 6/30/27
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
If modification, Effective Date of Mod. No. of Mod.						
Program: Workforce Support Program						
Budget Reference Page No.(s)						Total
Program Term	7/1/23-6/30/24	7/1/24 - 6/30/25	7/1/25-6/30/26	7/1/26 - 6/30/27	7/1/23-6/30/27	
Expenditures						
Salaries & Benefits	\$194,243	\$194,243	\$194,243	\$194,243		\$776,972
Operating Expenses	\$31,323	\$31,323	\$31,323	\$31,323		\$125,292
Subtotal	\$225,566	\$225,566	\$225,566	\$225,566		\$902,264
Indirect Percentage (%)	15%	15%	15%	15%		15%
Indirect Cost (Line 16 X Line 15)	\$33,835	\$33,835	\$33,835	\$33,835		\$135,340
Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0		\$0
Total Expenditures	\$259,401	\$259,401	\$259,401	\$259,401		\$1,037,604
HSA Revenues						
General Funds	\$259,401	\$259,401	\$259,401	\$259,401		\$1,037,604
Federal Funds						
TOTAL HSA REVENUES	\$259,401	\$259,401	\$259,401	\$259,401		\$1,037,604
Other Revenues						
						\$0
						\$0
						\$0
						\$0
						\$0
Total Revenues	\$259,401	\$259,401	\$259,401	\$259,401		\$1,037,604
Full Time Equivalent (FTE)						
Prepared by: Leny Nair						2/23/2023
HSA-CO Review Signature: _____						
HSA #1						6/20/2018

Self-Help for the Elderly
Program: Workforce Support Program

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		7/1/23-6/30/24	7/1/24 - 6/30/25	7/1/25-6/30/26	7/1/26 - 6/30/27	7/1/23-6/30/27
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS	DAS	DAS	DAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Project Coordinator	\$58,240	1.00	45%	0.45	\$26,208	\$26,208	\$26,208	\$26,208	\$104,832
Project Coordinator	\$58,240	1.00	45%	0.45	\$26,208	\$26,208	\$26,208	\$26,208	\$104,832
Lead Project Coordinator	\$58,240	1.00	40%	0.40	\$23,296	\$23,296	\$23,296	\$23,296	\$93,184
Registered Nurse	\$156,000	0.50	60%	0.30	\$46,800	\$46,800	\$46,800	\$46,800	\$187,200
Operations Manager	\$75,000	1.00	15%	0.15	\$11,250	\$11,250	\$11,250	\$11,250	\$45,000
Career Advisor	\$54,080	1.00	40%	0.40	\$21,632	\$21,632	\$21,632	\$21,632	\$86,528
TOTALS	\$459,800	5.50	245%	2.15	\$155,394	\$155,394	\$155,394	\$155,394	\$621,576
FRINGE BENEFIT RATE	25%								
EMPLOYEE FRINGE BENEFITS	\$114,950				\$38,849	\$38,849	\$38,849	\$38,849	\$155,396
TOTAL SALARIES & BENEFITS	\$574,750				\$194,243	\$194,243	\$194,243	\$194,243	\$776,972
HSA #2									6/20/2018

Self-Help for the Elderly
Program: Workforce Support Program

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Operating Expense Detail

Expenditure Category	TERM					TOTAL
		7/1/23-6/30/24	7/1/24 - 6/30/25	7/1/25-6/30/26	7/1/26 - 6/30/27	7/1/23-6/30/27
Rental of Property		\$15,116	\$15,116	\$15,116	\$15,116	\$60,464
Utilities(Elec, Water, Gas, Phone, Garbage)		\$600	\$600	\$600	\$600	\$2,400
Office Supplies, Postage		\$1,007	\$1,007	\$1,007	\$1,007	\$4,028
Building Maintenance Supplies and Repair		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Printing and Reproduction		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Insurance		\$1,700	\$1,700	\$1,700	\$1,700	\$6,800
Staff Training		\$400	\$400	\$400	\$400	\$1,600
Staff Travel-(Local & Out of Town)		\$500	\$500	\$500	\$500	\$2,000
Rental of Equipment		\$700	\$700	\$700	\$700	\$2,800
CONSULTANTS						
OTHER						
Program Expense		\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Communications		\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Recruitment		\$300	\$300	\$300	\$300	\$1,200
Outreach/Advertising		\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
						\$0
TOTAL OPERATING EXPENSES		\$31,323	\$31,323	\$31,323	\$31,323	\$125,292
HSA #3						6/20/2018