



**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: JUNE 7, 2023

SUBJECT: NEW GRANT: **SELF-HELP FOR THE ELDERLY (NON-PROFIT)** TO PROVIDE PEER AMBASSADOR PROGRAM AND SENIOR ESCORT SERVICES PROGRAM

DS
EE

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

GRANT AMOUNT:

New	Contingency	Total
\$3,312,876	\$331,288	\$3,644,164



London Breed
Mayor

Trent Rhorer
Executive Director

ANNUAL AMOUNT

<u>FY23/24</u>	<u>FY24/25</u>	<u>FY25/26</u>	<u>FY26/27</u>
\$828,219	\$828,219	\$828,219	\$828,219

Funding Source

<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
---------------	--------------	----------------	--------------------	--------------

FUNDING: \$3,312,876 \$331,288 \$3,644,164

PERCENTAGE: 100% 100%

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 \$3,312,876, plus a 10% contingency for a total amount not to exceed \$3,644,164. The purpose of this grant is to promote community awareness of DAS funded programs and services among older adults, adults with disabilities and their families living in Supervisorial Districts (Districts) 1, 2, 4, and 11 in the City and County of San Francisco and also to provide escort services to seniors for activities to ensure safety on San Francisco streets.



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

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

Service	FY 23-24	FY 24-25	FY 25-26	FY 26-27	Total FY 23-27	10% Contingency	Total Grant Amount FY 23-27
Peer Ambassador	\$169,219	\$169,219	\$169,219	\$169,219	\$676,876	\$67,688	\$744,564
Senior Escort Services	\$659,000	\$659,000	\$659,000	\$659,000	\$2,636,000	\$263,600	\$2,899,600
Total	\$828,219	\$828,219	\$828,219	\$828,219	\$3,312,876	\$331,288	\$3,644,164

Background

The Department of Disability and Aging Services (DAS) is responsible for planning, administering, and delivering a variety of programs and 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.

Since 2019, the peer ambassador program has been promoting awareness of DAS funded services and programs in order to address the lower participation rates in DAS services in the outer districts including Districts 1, 2, 4, and 11. Both older adults and adults with disabilities view their peers as a trusted information source and leveraging existing relationships and networks is an efficient and effective strategy to expand knowledge of services for current and potential consumers. Older adults and adults with disabilities benefit from enhanced knowledge of DAS services via the Peer Ambassadors trained and recruited in the program. Peer Ambassadors work closely with the Aging and Disability Resource Centers (ADRC) in the identified districts to help facilitate referrals to DAS programs and services.

In 2021, as a response to the rise in threats and violence against the Asian-American/Pacific Islander (AAPI) community, DAS began funding the senior escort services program. This program provides escort services to older adults and adults with disabilities, in order to increase protection and a sense of safety for participants. Since the beginning of this program, the escort service has been utilized by a high number of consumers and has proven to be a vital need in the community. Clients across the City benefit from the sense of safety and security provided by the escorts. As threats



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

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

and violence against the AAPI community as well as other groups of older adults and adults with disabilities remain, the need for senior escort services continues.

Services to be Provided

Self-Help for the Elderly will hire and train peer ambassadors to conduct outreach activities and disseminate information about DAS programs and services to non-profit and/or faith based organizations, businesses, health care providers, housing site coordinators, and other individuals who are likely to have contact with or knowledge of the target population. The program will have a minimum of four (4) peer ambassadors to ensure each district has at least one dedicated ambassador. Peer ambassadors will be older adults and/or adults with disabilities living in the City and County of San Francisco.

Self-Help for the Elderly will provide escort services to seniors for activities to ensure safety on the streets in San Francisco. Activities include but are not limited to doctor/dental appointments, bank visits, vaccination sites, social activities such as senior centers, grocery shopping, etc. The escort services will be either on a one-to-one basis or in groups. Program staff will connect with seniors who have escort service needs. Once the referral is received, staff will confirm date, time, meeting place, types of activities with seniors and will provide escort service. Staff will meet the client and accompany them to their activity. In case of an emergency, program staff who provide escort services will accompany individuals to support and protect them and report all emergencies or potential Asian Hate Crime or discrimination.

Please refer to attached Appendices A, A1, B and B1 for more detailed information regarding service objectives, outcome objectives, and budget.

Selection

Grantee was selected through Request for Proposals #1072, which was competitively bid on March 15, 2023.

Funding

Funding for this grant is provided through County General Funds.

ATTACHMENTS

Peer Ambassador Program

Appendix A – Services to be Provided



SAN FRANCISCO
HUMAN SERVICES AGENCY

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

Appendix B – Budget

Senior Escort Services Program

Appendix A1 – Services to be Provided

Appendix B1 – Budget

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

I. Purpose of Grant

The purpose of this grant is to provide the Peer Ambassador program designed to promote the awareness of services coordinated and funded by the Department of Disability and Aging Services of the San Francisco Human Services Agency (DAS) in the community. This grant specifically aims to heighten the awareness of DAS and DAS funded programs and services among older adults, adults with disabilities and their families living in Supervisorial Districts 1, 2, 4, and 11 in the City and County of San Francisco.

Peer ambassadors work closely with the Aging and Disability Resource Centers (ADRC) in the identified districts to help facilitate referrals to DAS programs and services. Older adults and adults with disabilities benefit from enhanced knowledge of DAS services via the Peer ambassadors trained and recruited in the program. Peer ambassadors will focus their efforts on reaching older adults, adults with disabilities, and their families living in Districts 1, 2, 4, and 11 and in seeking relationships with community members who are likely to have contact with or knowledge of the target population. Peer ambassadors will establish themselves in the community as a reliable resource and trusted means to connect with DAS.

II. Definitions

Aging and Disability Resource Center (ADRC)	Located throughout San Francisco, Aging and Disability Resource Centers (ADRC) specialize in information, referral, and assistance services for older adults, adults with disabilities and caregivers in the community. ADRCs are one-stop shops for support services including caregiver support, case management, in-home care, financial planning, medical care, translation services, and housing. (https://www.sfhsa.org/services/disability-aging-services/aging-disability-resource-centers)
Adult Protective Services (APS)	The unit within DAS that accepts and responds to reports of abuse, neglect, exploitation, and self-neglect involving older adults and adults with disabilities. (https://www.sfhsa.org/services/protection-safety/adult-abuse)
Adult with a Disability	A person who is 18 to 59 years of age living with a disability
CARBON	Contracts Administration, Reporting and Billing Online System.

Community Member/s	Community members include non-profit and/or faith-based organizations, businesses, health care providers, housing site coordinators, and other individuals who are likely to have contact with or knowledge of older adults and/or adults with disabilities living in the community. A community member does not receive payment from the grantee or DAS to promote awareness of DAS programs and/or services.
Community Partner	A community member recruited by a peer ambassador to help promote awareness of DAS programs and services by displaying and/or having available DAS approved information bulletins and brochures about DAS and/or DAS programs and services at their physical location. A community partner does not receive payment from the grantee or DAS to promote awareness of DAS programs and/or services.
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.
Controller	Controllers of the City and County of San Francisco or designated agent
DAS	Department of Disability and Aging Services.
DAS Benefits and Resource Hub	Unit within DAS that is equipped to receive calls, requests, and drop-ins from the community and provide information, referrals, and assistance for older adults and adults with disabilities, caregivers, and community-based organizations (https://www.sfhsa.org/contact/locations/das-benefits-and-resources-hub)
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	Self-Help for the Elderly
Information Distribution	Peer Ambassadors will provide information about DAS services to organizations, businesses and individuals in the community (e.g., non-profit organizations, faith-based organizations, health care providers, housing site coordinators, and neighborhood markets).
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, queer, intersex, 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.
DFOAC	Dignity Fund Oversight and Advisory Committee
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
Outreach Activity	An activity conducted by a peer ambassador at a location other than a DAS funded service site and within the District 1, 2, 4, and/or 11. The activity will create an opportunity to provide information about DAS programs and services to older adults, adults with disabilities, and their families who might not otherwise be aware or have access to the information; examples include setting up an information table at a health fair, community event, or faith base gathering
Peer Ambassador/ Ambassador	An older adult or adult with a disability trained and hired by the grantee to promote DAS programs and services in the community
Senior	Person who is 60 years or older, used interchangeably with older adult.
SF DAS 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.
SFHSA	Human Services Agency of the City and County of San Francisco

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).
Supervisory Districts/Districts 1, 2, 4, and 11	There are the eleven supervisory districts in the City and County of San Francisco. San Francisco Supervisory Districts Metes and Bounds is located at https://sfgov.org/ccsfgsa/san-francisco-supervisory-districts-metes-and-bounds and it provides a detailed description of each district. District maps can be located at: https://sfgov.org/ccsfgsa/sf-district-maps-data

III. Target Population

Peer Ambassadors will be promoting and disseminating information about DAS programs which are designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Hiring Eligibility Requirements for Peer Ambassador Positions

1. An older adult aged 60 years or older *or*
2. An adult with a disability, aged 18-59 *and*
3. A resident of the City and County of San Francisco

V. Description of Services

1. Grantee will recruit, hire and train older adults and/or adults with disabilities living in the City and County of San Francisco as peer ambassadors. Grantee will hire a minimum of four (4) peer ambassadors and ensure that Supervisory Districts 1, 2, 4, and 11 each have at least one dedicated and unique peer ambassador.

2. Grantee will ensure that Districts 1, 2, 4, and 11 have equitable working hours dedicated by a peer ambassador with a minimum of ten (10) hours, on average, per week devoted to each district by a peer ambassador.
3. Peer ambassadors will disseminate information, verbal and written, about DAS programs and services to a wide variety of organizations, businesses and individuals in the community (e.g., non-profit organizations, faith based organizations, health care providers, housing site coordinators, and neighborhood markets) who are likely to have contact with or knowledge of older adults and/or adults with disabilities. Their efforts will be concentrated on reaching individuals in Districts 1, 2, 4, and 11. Peer ambassadors will utilize a combination of methods to disseminate information about DAS programs and services and heighten the awareness of their existence including but not limited to a word-of-mouth approach, community presentations, workshops and distribution of written collateral.
4. Grantee will seek and obtain approval from DAS for any written information or collateral provided by a peer ambassador about DAS programs and services prior to its distribution in the community.
5. Grantee will ensure that peer ambassadors have working relationships with the Aging and Disability Resource Centers (ADRC) in Districts 1, 2, 4, and 11 to help facilitate referrals to DAS programs and services.
6. Peer ambassadors will build relationships within the community, establish themselves as a resource and means to connect with DAS and the ADRC in the district, and recruit community partners to help increase the awareness of DAS funded programs and services.
7. Grantee will track and record the units of service provided through this grant agreement for each of the districts and ensure that units of service provided are not “co-mingled” with other DAS funded programs.
8. Grantee will provide comprehensive training to each peer ambassador that includes, but is not limited to, an overview of DAS programs and services available citywide and service sites and the DAS Benefits and Resource Hub, an introduction to ADRCs within the targeted districts, and how to report suspected abuse or self-neglect to Adult Protective Services. A peer ambassador must receive training before engaging with the community to promote DAS programs and services.
9. Grantee will coordinate an in-person orientation with the DAS Benefits and Resource Hub for each peer ambassador. The orientation will introduce peer ambassadors to the DAS Benefits and Resource Hub team. DAS team members will explain the role the Hub plays in connecting older adults and

adults with disabilities to services. Peer ambassadors will receive an overview of the array of services available to older adults and adults with disabilities. Peer ambassadors will learn how to make referrals to the DAS Benefits and Resource Hub and who to contact at the Hub for questions, additional information, and/or support when working in the community. The topics covered in the orientation will be at the discretion of DAS and/or DAS Benefits and Resource Hub.

10. Grantee will have a written outreach plan for each district. The outreach plan will contain details related to outreach activities at community events and/or targeted locations that will create opportunities for peer ambassadors to share information through a word-of-mouth approach about DAS programs and services. The outreach plan will include fostering relationships with community members and recruiting community partners.
11. Grantee will develop and implement an evaluation process whereby community members and partners are able to provide feedback to the Grantee on the outreach activities conducted by peer ambassadors. The Grantee will provide DAS with a quarterly summary of the evaluation and feedback received.
12. Grantee will conduct meetings, scheduled at least quarterly, with all peer ambassadors to exchange program and service information between the peer ambassadors, the Grantee, and DAS. The meetings will also provide opportunity for peer ambassadors to share their experiences, accomplishments, and troubleshoot any barriers encountered in the community.
13. Grantee will have readily available resources that peer ambassadors can access as needed to help and support them in their role and provide best practices and suggestions when promoting DAS programs and services in the community.
14. Grantee agrees to meet on a quarterly basis or as needed with DAS to ensure consistent messaging about DAS programs and services, foster information exchange, and troubleshoot any issues that emerge as it relates to the peer ambassador program.
15. Grantee shall ensure adequate and culturally competent paid and volunteer staffing to administer the program, deliver quality services to meet the needs of the client participants, and adhere to all DAS program standards.
16. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules when applicable.

17. 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

The following proposed sites will be available for the target population to meet with Peer Ambassadors, receive information about DAS services, and connect to services via the ADRC sites:

- District 1: Jackie Chan Senior Center and Jackie Chan Adult Day Health Center
- District 2: Self-Help for the Elderly has 2 ADRC sites in District 3 that are close to District 2, and will be available points of contact for outreach activities. They are Geen Mun Senior Center and Self-Help for the Elderly.
- District 4: West Portal Clubhouse and South Sunset Senior Center
- District 11: Geneva Senior Center Service

Jackie Chan Senior Center	Geen Mun Senior Center and ADRC Hub	Self-Help for the Elderly and ADRC Hub	South Sunset Senior Center and ADRC Hub	West Portal Club House and ADRC Hub	Geneva Community Center
5757 Geary Blvd San Francisco, CA 94121	777 Stockton St San Francisco, CA 94108	601 Jackson St San Francisco, CA 94133	2601 40 th Ave San Francisco, CA 94166	131 Lenox Way San Francisco, CA 94134	5050 C Mission St San Francisco, CA 94134
Monday-Friday 9:00am-5:00pm Saturday 9:00am-2:00pm	Monday-Friday 9:00am-5:00pm Saturday 9:00am-2:00pm	Monday-Friday 9:00am-12:00pm and 1:00pm-4:00pm	Monday-Friday 9:00am-3:00pm	Monday-Friday 9:00am-2:00pm	Monday-Friday 9:00am-5:00pm

VII. Service Objectives

On an annual basis, Grantee will meet the following Service Objectives for the Peer Ambassador Program detailed in the table below:

	FY23/24	FY 24/25	FY 25/26	FY 26/27	Total
Hire and Train Peer Ambassadors	5	5	5	5	20
Outreach Activities	300	300	300	300	1200
Community Partners	20	20	20	20	80
Information Distribution	100	100	100	100	400

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 surveys created by Grantee and distributed, collected, and recorded by Grantee. Surveys will be distributed to and completed by peer ambassadors, community partners, and ADRCs, with a target completed return rate of 75%. The annual survey is subject to DAS input and approval. On an annual basis, Grantee will meet the following Outcome Objectives:

1. The annual minimum retention rate for DAS ambassadors. Target: 50%
2. DAS ambassadors report their service as a peer ambassador has contributed to them feeling valued. Target: 80%
3. Community partners recruited by the peer ambassadors will attribute an increased sense of awareness about DAS and DAS funded programs and services among older adults, adults with disabilities, their families, and/or other community members in their neighborhood to the peer ambassador program. Target: 80%
4. The Aging and Disability Resource Centers team in Districts 1, 2, 4, and 11 report the peer ambassador program has increased awareness of the ADRC in the district, DAS, and DAS funded programs and services among older adults, adults with disabilities, and/or their families in their respective districts. Target: 100%

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities. 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 SF DAS GetCare database in accordance to DAS policy.
3. Grantee will enter into the SF DAS 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 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 SFHSA 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 SFHSA and/or DAS.

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

Tahir.Shaikh@sfgov.org
Office of Contract Management

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 SF DAS 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

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: Peer Ambassador					
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	\$138,540	\$138,540	\$138,540	\$138,540	\$554,160
Operating Expenses	\$8,607	\$8,607	\$8,607	\$8,607	\$34,428
Subtotal	\$147,147	\$147,147	\$147,147	\$147,147	\$588,588
Indirect Percentage (%)	15%	15%	15%	15%	11%
Indirect Cost (Line 16 X Line 15)	\$22,072	\$22,072	\$22,072	\$22,072	\$88,288
Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$169,219	\$169,219	\$169,219	\$169,219	\$676,876
HSA Revenues					
General Funds	\$169,219	\$169,219	\$169,219	\$169,219	\$676,876
Federal Funds					
TOTAL HSA REVENUES	\$169,219	\$169,219	\$169,219	\$169,219	\$676,876
Other Revenues					
Volunteer Coordinator	\$9,558	\$9,558	\$9,558	\$9,558	\$38,232
Peer Ambassadors	\$28,080	\$28,080	\$28,080	\$28,080	\$112,320
Total Revenues	\$206,857	\$206,857	\$206,857	\$206,857	\$827,428
Full Time Equivalent (FTE)					
Prepared by: Leny Nair	415-677-7682				
HSA-CO Review Signature: _____					
HSA #1					6/20/2018

SELF-HELP FOR THE ELDERLY
 Program: Peer Ambassador

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
Peer Ambassador	\$41,600	0.50	100%	0.50	\$20,800	\$20,800	\$20,800	\$20,800	\$83,200
Peer Ambassador	\$38,230	0.50	100%	0.50	\$19,115	\$19,115	\$19,115	\$19,115	\$76,460
Peer Ambassador	\$39,520	0.50	100%	0.50	\$19,760	\$19,760	\$19,760	\$19,760	\$79,040
Peer Ambassador	\$39,520	0.38	100%	0.38	\$15,018	\$15,018	\$15,018	\$15,018	\$60,072
Program Assistant	\$48,880	1.00	50%	0.50	\$24,440	\$24,440	\$24,440	\$24,440	\$97,760
Program Supervisor	\$70,000	1.00	12%	0.12	\$8,400	\$8,400	\$8,400	\$8,400	\$33,600
Director of Social Services	\$105,000	1.00	8%	0.08	\$8,400	\$8,400	\$8,400	\$8,400	\$33,600
TOTALS	\$382,750	4.88	470%	2.58	\$115,933	\$115,933	\$115,933	\$115,933	\$463,732
FRINGE BENEFIT RATE	20%								
EMPLOYEE FRINGE BENEFITS	\$76,550				\$22,607	\$22,607	\$22,607	\$22,607	\$90,428
TOTAL SALARIES & BENEFITS	\$459,300				\$138,540	\$138,540	\$138,540	\$138,540	\$554,160
HSA #2									6/20/2018

SELF-HELP FOR THE ELDERLY

Appendix B, Page 3

Program: Peer Ambassador

Operating Expense Detail

<u>Expenditure Category</u>	TERM					TOTAL
		<u>7/1/23-6/30/24</u>	<u>7/1/24 - 6/30/25</u>	<u>7/1/25-6/30/26</u>	<u>7/1/26 - 6/30/27</u>	<u>7/1/23-6/30/27</u>
Rental of Property		\$3,200	\$3,200	\$3,200	\$3,200	\$12,800
Utilities(Elec, Water, Gas, Phone, Garbage)		\$500	\$500	\$500	\$500	\$2,000
Office Supplies, Postage		\$507	\$507	\$507	\$507	\$2,028
Building Maintenance Supplies and Repair		\$500	\$500	\$500	\$500	\$2,000
Printing and Reproduction		\$100	\$100	\$100	\$100	\$400
Insurance		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Staff Training		\$300	\$300	\$300	\$300	\$1,200
Staff Travel-(Local & Out of Town)		\$300	\$300	\$300	\$300	\$1,200
Rental of Equipment						
CONSULTANTS						
OTHER						
Peer Ambassadors Uniform/Jackets		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Workshop and Materials		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Recruitment		\$200	\$200	\$200	\$200	\$800
TOTAL OPERATING EXPENSES		\$8,607	\$8,607	\$8,607	\$8,607	\$34,428
HSA #3						6/20/2018

Appendix A1 – Services to be Provided
Self-Help for the Elderly
Senior Escort Services Program
July 1, 2023 – June 30, 2027

I. Purpose of Grant

The purpose of this grant is to provide escort services to older adults and adults with disabilities living in the City and County of San Francisco. The escort services will help ensure a sense of safety and increased protection for participants. The types of activities that clients can request include but are not limited to doctor/dental appointments, bank visits, vaccination sites, social activities such as senior centers, grocery shopping, etc. The senior escort services will be either on a one-to-one basis or in groups.

II. Definitions

Adult Protective Services (APS)	The unit within DAS that accepts and responds to reports of abuse, neglect, exploitation, and self-neglect involving older adults and adults with disabilities. (https://www.sfhsa.org/services/protection-safety/adult-abuse)
Adult with a Disability	A person who is 18 to 59 years of age living with a disability
CARBON	Contracts Administration, Reporting and Billing Online System.
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
Controller	Controllers of the City and County of San Francisco or designated agent
DAS	Department of Disability and Aging Services
DAS Benefits and Resource Hub	Unit within DAS that is equipped to receive calls, requests, and drop-ins from the community and provide information, referrals, and assistance for older adults and adults with disabilities, caregivers, and community-based organizations (https://www.sfhsa.org/contact/locations/das-benefits-and-resources-hub)
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
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	Self-Help for the Elderly
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
DFOAC	Dignity Fund Oversight and Advisory Committee
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
Senior	Person who is 60 years or older, used interchangeably with older adult.
SF DAS 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.
SFHSA	Human Services Agency of the City and County of San Francisco
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. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Client Eligibility

To be eligible for services, clients must be:

- An older adult aged 60 years or older *or*
- An adult with a disability, aged 18-59 *and*
- A resident of the City and County of San Francisco *and*
- In need of escort services in the community due to safety concerns.

V. Description of Services

1. Grantee will provide escort services to seniors for activities to ensure safety on the street in San Francisco. Activities including but not limited to doctor's appointments, dental appointments, bank, vaccination sites, social activities such as senior centers, grocery shopping, etc.
2. Grantee will designate program hubs throughout San Francisco. The hub will coordinate referrals, paid staff, volunteers, and will be a meeting point for the program. The escort services can be either on one-to-one basis or in groups. Program staff connect with seniors who have escort service needs. Once referral is received, staff will confirm with date, time, meeting place, types of activities with seniors and provide escort service. Staff will meet client and travel with them to activities.
3. Grantee will ensure, in case of emergency, program staff who provide escort services will serve to support and protect seniors, and report all emergencies or potential situations to the Asian Hate Crime unit.
4. Grantee will provide comprehensive training to each escort staff that includes, but is not limited to, personal safety, de-escalation, first-aid training, and how to report all emergencies or potential situations to the Asian Hate Crime unit as well as how to report suspected abuse or self-neglect to Adult Protective Services. An escort staff must receive training before providing escort services.
5. 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.

6. 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.
7. Grantee will develop and implement an evaluation process whereby clients are able to provide feedback to the Grantee on the escort services provided by escort staff. The Grantee will provide DAS with a quarterly summary of the evaluation and feedback received.
8. Grantee will conduct meetings, scheduled at least quarterly, with all escort staff to exchange program and service information between the escort staff, the Grantee, and DAS. The meetings will also provide opportunity for escort staff to share their experiences, accomplishments, and troubleshoot any barriers encountered in the community.
9. Grantee will have readily available resources that escort staff can access as needed to help and support them in their role and provide best practices and suggestions when providing senior escort services in the community.
10. Grantee agrees to meet on a quarterly basis or as needed with DAS to ensure consistent messaging about DAS programs and services, foster information exchange, and troubleshoot any issues that emerge as it relates to the senior escort services program.
11. Grantee shall ensure adequate and culturally competent paid and volunteer staffing to administer the program, deliver quality services to meet the needs of the client participants, and adhere to all DAS program standards.
12. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules as needed.
13. 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

Senior Escort services are available Monday through Saturday. Participants in the program are required to reach out to their assigned Senior Escort to notify the date and location of their requested trip. Senior Escort trips are supposed to begin and end in San Francisco County. The details of the sites and operation hours can be found below.

Jackie Chan Senior Center	Geen Mun Senior Center	Self-Help for the Elderly	South Sunset Senior Center	West Portal Club House	Geneva Community Center
---------------------------	------------------------	---------------------------	----------------------------	------------------------	-------------------------

5757 Geary Blvd San Francisco, CA 94121	777 Stockton St San Francisco, CA 94108	601 Jackson St San Francisco, CA 94133	2601 40 th Ave San Francisco, CA 94166	131 Lenox Way San Francisco, CA 94134	5050 C Mission St San Francisco, CA 94134
Monday-Friday 9:00am-5:00pm Saturday 9:00am-2:00pm	Monday-Friday 9:00am-5:00pm Saturday 9:00am-2:00pm	Monday-Friday 9:00am- 12:00pm and 1:00pm-4:00pm	Monday-Friday 9:00am-3:00pm	Monday-Friday 9:00am-2:00pm	Monday-Friday 9:00am-5:00pm

VII. Service Objectives

On an annual basis, Grantee will meet the following Service Objectives for the Senior Escort Program detailed in the table below:

	FY 2023- 2024	FY 2024- 2025	FY 2025- 2026	FY 2026- 2027
Outreach activities. (An escort stationing themselves at a high traffic location, such as a senior center or library, in order to share information about senior escort services is considered an outreach activity. Each outreach activity must be a minimum of one hour.)	50	50	50	50
Unduplicated older adults and adults with disabilities.	500	500	500	500
Escort Services. (Escort services with multiple clients will count as one escort service per client, per one-way trip. A round-trip escort is considered two escorts.)	5000	5000	5000	5000

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. Escort requests will be provided timely (within 1 business day if requests are received at least 24 hours in advance). Target: 80%
2. Older adults using escort service report an increased feeling of safety. Target: 80%

3. Older adults using escort services are satisfied with the services they received.
Target: 80%

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. 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 SF DAS GetCare database in accordance to DAS policy.
3. Grantee will enter into the SF DAS 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

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; Senior Escort 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 SF DAS 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 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

SELF-HELP FOR THE ELDERLY

(Check One) New Renewal Modification

If modification, Effective Date of Mod. No. of Mod.

Program: Senior Escorts					
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	\$498,984	\$498,984	\$498,984	\$498,984	\$1,995,936
Operating Expenses	\$74,060	\$74,060	\$74,060	\$74,060	\$296,240
Subtotal	\$573,044	\$573,044	\$573,044	\$573,044	\$2,292,176
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$85,956	\$85,956	\$85,956	\$85,956	\$343,824
Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$659,000	\$659,000	\$659,000	\$659,000	\$2,636,000
HSA Revenues					
General Funds	\$659,000	\$659,000	\$659,000	\$659,000	\$2,636,000
TOTAL HSA REVENUES	\$659,000	\$659,000	\$659,000	\$659,000	\$2,636,000
Other Revenues					
In-Kind Match-Volunteers	\$5,514	\$5,514	\$5,514	\$5,514	\$22,056
Total Revenues	\$664,514	\$664,514	\$664,514	\$664,514	\$2,658,056
Full Time Equivalent (FTE)					
Prepared by: Leny Nair					
HSA-CO Review Signature: _____					
HSA #1					6/20/2018

SELF-HELP FOR THE ELDERLY

Appendix B1, Page 2

Program: Senior Escorts

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
Program Supervisor	\$70,000	1.00	88%	0.88	\$61,600	\$61,600	\$61,600	\$61,600	\$246,400
Director of Social Services	\$105,000	1.00	10%	0.10	\$10,500	\$10,500	\$10,500	\$10,500	\$42,000
Program Coordinator	\$52,000	1.00	100%	1.00	\$52,000	\$52,000	\$52,000	\$52,000	\$208,000
Program Assistant	\$48,880	1.00	50%	0.50	\$24,440	\$24,440	\$24,440	\$24,440	\$97,760
Volunteer Coordinator	\$52,000	0.50	100%	0.50	\$26,000	\$26,000	\$26,000	\$26,000	\$104,000
Senior Escort Driver	\$41,600	1.00	100%	1.00	\$41,600	\$41,600	\$41,600	\$41,600	\$166,400
Senior Escort Driver	\$41,600	1.00	100%	1.00	\$41,600	\$41,600	\$41,600	\$41,600	\$166,400
Senior Escort	\$39,520	1.00	100%	1.00	\$39,520	\$39,520	\$39,520	\$39,520	\$158,080
Senior Escort	\$39,520	1.00	100%	1.00	\$39,520	\$39,520	\$39,520	\$39,520	\$158,080
Senior Escort	\$39,520	1.00	100%	1.00	\$39,520	\$39,520	\$39,520	\$39,520	\$158,080
Senior Escort	\$39,520	0.50	100%	0.50	\$19,760	\$19,760	\$19,760	\$19,760	\$79,040
Senior Escort	\$39,520	0.50	100%	0.50	\$19,760	\$19,760	\$19,760	\$19,760	\$79,040
TOTALS	\$608,680	10.50	1048%	8.98	\$415,820	\$415,820	\$415,820	\$415,820	\$1,663,280
FRINGE BENEFIT RATE	20%								
EMPLOYEE FRINGE BENEFITS	\$121,736				\$83,164	\$83,164	\$83,164	\$83,164	\$332,656
TOTAL SALARIES & BENEFITS	\$730,416				\$498,984	\$498,984	\$498,984	\$498,984	\$1,995,936
HSA #2									6/20/2018

SELF-HELP FOR THE ELDERLY

Appendix B1, Page 3

Program: Senior Escorts

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		\$17,500	\$17,500	\$17,500	\$17,500	\$70,000
Utilities(Elec, Water, Gas, Phone, Garbage)		\$600	\$600	\$600	\$600	\$2,400
Office Supplies, Postage		\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
Building Maintenance Supplies and Repair		\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
Printing and Reproduction		\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Insurance		\$6,000	\$6,000	\$6,000	\$6,000	\$24,000
Staff Training		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Staff Travel/Transportation Costs		\$12,310	\$12,310	\$12,310	\$12,310	\$49,240
Rental of Equipment		\$150	\$150	\$150	\$150	\$600
CONSULTANTS						
OTHER						
Senior Escort Uniforms/Jackets		\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Database/Software		\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
Workshops & Materials		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Communications		\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Recruitment Expenses		\$300	\$300	\$300	\$300	\$1,200
TOTAL OPERATING EXPENSES		\$74,060	\$74,060	\$74,060	\$74,060	\$296,240
HSA #3						6/20/2018