



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

Department of Benefits
and Family Support

Department of Disability
and Aging Services

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

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DATE: JULY 19, 2023

SUBJECT: NEW GRANTS: **SHANTI PROJECT (NON-PROFIT)**
TO PROVIDE CARE NAVIGATION AND PEER
SUPPORT SERVICES, SOCIAL ISOLATION
PREVENTION, AND ANIMAL BONDING

DS
EB

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

GRANT AMOUNT:

<u>New</u>	<u>Contingency</u>	<u>Total</u>
\$9,111,840	\$911,184	\$10,023,024

ANNUAL AMOUNT

<u>FY23/24</u>	<u>FY24/25</u>	<u>FY25/26</u>	<u>FY26/27</u>
\$2,277,960	\$2,277,960	\$2,277,960	\$2,277,960



London Breed
Mayor

Trent Rhorer
Executive Director

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$9,111,840			\$911,184	\$10,023,024
PERCENTAGE:	100%			100%	

The Department of Disability and Aging Services (DAS) requests authorization to enter into grants with Shanti Project for the period of July 1, 2023 to June 30, 2027, in an amount of \$9,111,840, plus a 10% contingency for a total amount not to exceed \$10,023,024. The purpose of the grants are to provide care navigation and peer support, social isolation prevention, and animal bonding services.

	FY 23/24 – FY 26/27 Annual amount	Grant total	Contingency	Not-to- Exceed
Care Navigation and Peer Support	\$632,851	\$2,531,404	\$253,140	\$2,784,544
Social Isolation Prevention	\$511,113	\$2,044,452	\$204,445	\$2,248,897
Animal Bonding	\$1,133,996	\$4,535,984	\$453,598	\$4,989,582
Total	\$2,277,960	\$9,111,840	\$911,184	\$10,023,024

Background

The LGBT Task Force document, “LGBT Aging at the Golden Gate: San Francisco Policy Issues and Recommendations”, outlined needs and gaps in delivery of services to the LGBTQ+ population. LGBTQ+ older adults and adults with disabilities, when compared to those who identify with the heterosexual population, live with higher rates of physical disabilities, are more likely to live alone, and have lower levels of social support and companionship. These factors can lead to significantly higher rates of social isolation, depression, anxiety, and suicidal ideation.

In addition, many in the community have found the system of social services in San Francisco to be overly complex. Navigating that system may seem daunting and is often a barrier to accessing services. Furthermore, others are also unaware of the array of services available through DAS.

Care Navigation and Peer Support was the model created to address these issues in the LGBTQ+ populations. The program helps facilitate and improve service connection, lessen the burden of service navigation, and plays a crucial role in helping individuals get the right support at the right time. It can also provide consumer centered support that helps enhance health, well-being and the ability of older adults and adults with disabilities to live safely in their communities. This care navigation model has become a foundational practice for Shanti’s programs.

In addition, the Social Isolation Prevention Services program began utilizing this model to help reduce isolation and loneliness in the LGBTQ+ community. The program also utilizes peer support to help individuals navigate community opportunities enhancing prospects for engagement and socialization.

DAS has also been in partnership with Shanti Project through their PAWS (Pets are Wonderful Support) program to support animal bonding since 2016. In addition to animal bonding, PAWS incorporated a pet food and pet supply bank to the program. This was added when volunteers from the San Francisco AIDS Foundation’s food bank became concerned that some of their clients were neglecting their own nutritional needs and giving the food they received to their pets. Currently, services of the Shanti Animal Bonding program include a pet food bank,

veterinary services, vet clinics and supportive pet care services such as dog walking, in-home cat care, emergency pet foster care and monthly dog washes.

Services to be Provided:

These grants will cover 3 different programs: Care Navigation and Peer Support, Social Isolation Prevention for LGBTQ+ Older Adults and Adults with Disabilities, and Animal Bonding Services for LGBTQ+ Older Adults and Adults with Disabilities.

Care Navigation and Peer Support

The grantee will continue to develop and implement a program for older adults and adults with disabilities who may be reluctant to seek DAS services, find accessing services too complex, or may be unaware of services. The program will focus on serving individuals with one or more of the equity factors identified in the DFCNA. The grantee will focus on serving eligible consumers within the LGBTQ+ community. Curry Senior Center, as the subcontractor, will concentrate on serving additional consumers with one or more of the other equity factors identified in the DFCNA which include social isolation, low income, limited or no English-speaking proficiency, communities of color, and those at-risk for institutionalization.

The program will have two distinct components – (1) care navigation and (2) peer support. The care navigation component will provide assistance to older adults and adults with disabilities to help guide them through and around barriers in the City’s system of social services. Care navigation will include a consumer needs assessment conducted by a trained care navigator and work with enrolled consumers to develop an agreed upon navigation plan for services. Care navigators will assist with facilitation and access to services that are intended to help manage a wide variety of needs. Care navigation may include making appointments for medical care issues, organizing transportation, accompanying enrolled consumers to appointments, and advocating for them as needed. The peer support component of the program will offer emotional and practical support to enrolled consumers by trained volunteers, student-interns, and staff. The two program components are complementary and aim to enhance well-being and maximize the safety, health and independence of older adults and adults with disabilities in the community.

Social Isolation Prevention for LGBTQ+ Older Adults and Adults with Disabilities

The Social Isolation Prevention Services uses care navigation and peer support services to address emotional, behavioral, health and social isolation challenges faced by lesbian, gay, bisexual, and transgender older adults, and adults with disabilities. Program services include care navigation to help individual with information, referral and coordination, peer support that utilizes volunteers to provide outreach and supportive services, and support programming that enhances the emotional and behavioral wellbeing of underserved LGBTQ+ older adults and adults with disabilities.

The Social Isolation Prevention program includes subcontractor relationships with the Curry Senior Center and Openhouse. This collaboration enables clients to access additional resources, resulting in a more comprehensive and accessible network of care.

Animal Bonding Services for LGBTQ+ Older Adults and Adults with Disabilities:

The model used in provision of the Animal Bonding services is also one of care navigation and peer support. Working together, these two aspects of the program facilitate the delivery of animal companion support services and pet and pet supply needs.

The value of the human-animal bond is beneficial to both. Having and caring for a pet has been shown to reduce stress, depression, and anxiety, and can lead to overall improved well-being and quality of life. Having a pet, and the support provided by this program, assists older adults and adults with disabilities to benefit from this companionship. Individuals may face situations that make having a pet more logistically difficult. This program is a unique service model that bridges this gap. Essential practical supports to clients include pet food bank and pet food delivery, dog walking and other pet supportive services, vet services, and emergency foster care, which allows clients to benefit from the support and unconditional love of an animal companion.

The care navigator is the main point of contact for clients. The services of the care navigator include intake, follow-up services identified, ongoing assessment, care coordination, information and referral needs and follow up, related to the animal bonding needs of the client. In addition, the care navigator assists in the process of identifying and utilizing the peer support volunteer aspect of the program. The peer support volunteer works with the client to assist the individual in accessing pet support services.

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

Selection

Grantee was selected through Request for Proposals #1064, which was competitively bid in May 2023.

Funding

Funding for these grants is provided through County General Funds.

ATTACHMENTS

Care Navigation and Peer Support

Appendix A

Appendix B

Appendix F

Social Isolation Prevention Services for LGBTQ+ Older Adults and People with Disabilities

Appendix A

Appendix B

Appendix F

Animal Bonding Services for Isolated LGBTQ+ Older Adults and Adults with Disabilities

Appendix A
Appendix B

APPENDIX A – Services to be Provided

Shanti Project

Care Navigation and Peer Support

July 1, 2023 -- June 30, 2027

I. Purpose

The purpose of this grant is to provide a Care Navigation and Peer Support program for older adults and adults with disabilities with a particular focus on serving individuals with one or more of the equity factors identified in the Dignity Fund Community Needs Assessment (DFCNA). The equity factors identified in the DFCNA include social isolation, low income, limited or no English-speaking proficiency, communities of color, sexual orientation and gender identity, and at-risk of institutionalization.

Care Navigation and Peer Support program is designed to reach into the community and engage clients reluctant to seek DAS services with a goal to maximize their health, well-being, safety, and independence. The care navigation component utilizes paid staff to assess client need and help with navigation of barriers to accessing needed services. In the complementary peer support component, trained volunteers are matched to clients and provide emotional and practical support from social visits to accompanying clients to appointments.

II. Definitions

Adult with a Disability	A person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing Online System
Care Navigation	Includes the following: intake, follow up, on-going assessment, information and referral, on-going care coordination, matching and support of client-volunteer peer support matches, facilitation of peer support volunteer trainings, facilitation of drop-in services, support group facilitation, peer-based psychosocial support (including practical assistance and emotional support).

Care Navigator	An individual that is trained to facilitate service connections for older adults and adults with disabilities to available resources in the City to help maintain well-being and promote stability in the community. Care navigators are skilled at navigating the system of services for eligible consumers. Care navigators are not required to have specific licensure or graduate-level training.
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
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	Shanti Project
Isolation	For the purpose of this grant, isolation is defined as combination of 2 or more of the following factors: self-reported feelings of isolation, mild to moderate depression, lack of natural or reliable supports, chronic illness or conditions, need for emotional and practical support, lack of engagement with available community-based, natural or social supports, and other additional factors that indicate 1:1 in home and wraparound support would be beneficial.
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.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Older Adult	Person who is 60 years or older
Peer Support	Includes the use of paid staff, student-interns, and peer support volunteers. Peer support services include emotional and practical support via regular interactions with clients such as social visits, accompaniment to appointments or events, and other assistance.

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	San Francisco Human Services Agency
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).
Supportive Programming	Includes the following: individual emotional and behavioral support, peer support groups (including abstinence-based and substance-use management groups), social activities, wellness and health education and training sessions, peer health activities, and early intervention programs.

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

Eligibility for Program Enrollment

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

IV. Description of Services

The grantee will develop and implement the Care-Navigation and Peer Support program to engage older adults and adults with disabilities. The required components of programming include the following:

1. Care Navigation: Through the use of care navigators, the grantee will assist older adults and adults with disabilities to access the system of services available to them through DAS. Care navigators help consumers overcome barriers to services. They occupy many roles and play a crucial part in helping consumers get the right support, at the right time. Care

navigators serve as a point of contact for eligible consumers and provide services which include but are not limited to intake, follow up, ongoing assessment and care coordination, information and referral, facilitation of drop-in services, coordination of peer support, assistance with support group access, psychosocial support including practical assistance and emotional support .

Care navigators are not required to have specific licensure or graduate-level training. Care navigator qualifications are based on expertise in coordinating supportive service care, conducting advocacy, and/or providing psychosocial support for the target population. Care navigators are evaluated for experience and competence in working with the identified target population with an emphasis on relevant cultural and linguistic proficiency.

2. Peer Support: Through the use of trained volunteers, the grantee will provide outreach and supportive services to older adults and adults with disabilities. The role of a peer support volunteer may include, but is not limited to offering emotional support, sharing knowledge, teaching skills, providing practical assistance, and connecting individuals with resources, opportunities, communities of support, and other people. The services provided by a peer support volunteer are intended to enhance consumers' well-being and maximize their safety, health and independence. The use of a peer support network will also create alternative pathways to reach older adults and adults with disabilities who may be reluctant to seek DAS services, find accessing services too complex, or maybe unaware of their existence.

Grantee will develop an assessment and training program for a peer support volunteer. The matching of a peer support volunteer with an older adult or adult with disability should be based on commonality and/or shared identities. An assessment should include evaluation of a volunteer's physical and mental health status, capacity to provide emotional, social, and practical support to the target population. Training should be comprehensive (a minimum of 20 hours) and include but is not limited to cultural competency, active listening, counselor-consumer boundaries, mandated reporting, suicide ideation, clinical issues, psychosocial issues, mental and/or cognitive and/or physical impairments. The assessment and training of a peer support volunteer must occur prior to their match and engagement with an enrolled consumer. Program design could include student interns in addition to peer support volunteers.

3. Support Programming: This program also seeks to create and increase the number of programs and wellbeing programs that support and enhance the emotional and behavioral wellbeing of underserved LGBTQ+ older adults. These connective programs shall consist of:
 - 1) individual emotional and behavioral support,
 - 2) peer support groups, including abstinence-based and substance-use management groups, social activities,
 - 3) wellbeing and health related education and activities, and
 - 4) outreach and early intervention programs

V. Location and Time of Services

Details of the sites and operation hours are as attached in the Site Chart (Appendix F.)

VI. Service Objectives

On an annual basis, Grantee will meet the following Service Objectives for the Care Navigation and Peer Support program detailed in the table below:

	FY23/24	FY 24/25	FY 25/26	FY 26/27
Unduplicated Isolated Consumers	100	100	100	100
Hours of Care Navigation	5400	5400	5400	5400
Volunteers Recruited and Developed	20	20	20	20
Peer Support Hours	1500	1500	1500	1500

VII. 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. Consumers and peer support volunteers will complete a survey. The annual survey is subject to DAS input and approval. On an annual basis, Grantee will meet the following Outcome Objectives:

- Consumers will respond to an annual consumer survey. Target: 60%.
- Peer support volunteers will respond to an annual volunteer survey. Target: 60%.
- Surveyed consumers will report that participation in the Care Navigation and Peer Support program helped them navigate the service system more efficiently and effectively.
Target: 75%.
- Surveyed consumers who accessed services through a care navigator will report that the care navigator helped them to overcome barriers to services. Target: 60%.
- Consumers who accessed services through a peer support volunteer will report connecting to a new service or program that enhanced their well-being. Target: 75%.
- Peer support volunteers will report that their training was comprehensive and helpful to their program role. Target: 80%

VIII. Reporting and Other Requirements

- A. Grantee will provide various reports during the term of the grant agreement.
- B. Grantee will enter consumers' data into the SF DAS GetCare module.
- C. 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.
- D. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.

- F. 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.
- G. Grantee will provide an annual consumer satisfaction survey report to DAS by March 15 or a date agreed upon by DAS and grantee each grant year.
- H. Grantee will provide Ad Hoc reports as requested by HSA/DAS/OCP.
- I. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as requested by HSA/DAS. The due dates for submitting the summary reports are January 10th (for July 1 – December 31 data) and July 10th (for January 1 – June 30 data).
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. 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:

Tara Alvarez, Senior Contract Manager Office of Contract Management, HSA P.O. Box 7988 San Francisco, CA 94120-7988 Email: Tara.Alvarez@sfgov.org	Noah Gallo, Administrative Analyst Office of Community Partnerships, DAS 1650 Mission Street, 5 th Floor San Francisco, CA 94103 Email: Noah.Gallo1@sfgov.org
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IX. Monitoring Activities

X. 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 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; 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; board of director list; and whether services are provided appropriately according to Sections IV, VI, and VII.

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

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name <u>Shanti Project</u>				Term	
6					7/1/23-6/30/27	
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod. No. of Mod.					
9	Program: Care Navigation and Peer Support					
10	Budget Reference Page No.(s)					
11	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
12	Expenditures					
13	Salaries & Benefits	\$388,292	\$388,292	\$388,292	\$388,292	\$1,553,168
14	Operating Expense	\$70,905	\$70,905	\$70,905	\$70,905	\$283,620
15	Subtotal	\$459,197	\$459,197	\$459,197	\$459,197	\$1,836,788
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$70,154	\$70,154	\$70,154	\$70,154	\$280,616
18	Capital/Subcontractor Expenditure	\$103,500	\$103,500	\$103,500	\$103,500	\$414,000
19	Total Expenditures	\$632,851	\$632,851	\$632,851	\$632,851	\$2,531,404
20	HSA Revenues					
21	General Fund	\$632,851	\$632,851	\$632,851	\$632,851	\$2,531,404
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$632,851	\$632,851	\$632,851	\$632,851	\$2,531,404
30	Other Revenues					
31						
32	Metta Fund	\$37,500	\$37,500	\$37,500	\$37,500	\$150,000
33	In-Kind Volunteers	\$45,000	\$45,000	\$45,000	\$45,000	\$180,000
34						
35						
36	Total Revenues	\$715,351	\$715,351	\$715,351	\$715,351	\$2,861,404
37	Full Time Equivalent (FTE)	4.92	4.92	4.92	4.92	19.69
39	Prepared by: Eric Sutter		Telephone No.: (510) 593-7076		Date: 5/3/23	
40	HSA-CO Review Signature: _____					
41	HSA #1					10/25/2016

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3										
4	Program Name:									
5	Care Navigation and Peer Support									
6										
7	Salaries & Benefits Detail									
8										
9										
10										
11						7/1/23-6/30/24	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	
		Agency Totals		HSA Program						TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	7/1/23-6/30/27
12	POSITION TITLE									
13	Care Navigator	\$59,492	5.00	80%	3.98	\$236,977	\$236,977	\$236,977	\$236,977	\$947,908
14	Program Manager	\$72,500	1.00	25%	0.25	\$18,125	\$18,125	\$18,125	\$18,125	\$72,500
15	Volunteer Services Coordinator	\$67,490	1.00	10%	0.10	\$6,749	\$6,749	\$6,749	\$6,749	\$26,996
16	Volunteer Services Manager	\$68,909	1.00	20%	0.20	\$13,782	\$13,782	\$13,782	\$13,782	\$55,128
17	Volunteer Services Director	\$82,500	1.00	7%	0.07	\$5,775	\$5,775	\$5,775	\$5,775	\$23,100
18	Sr. Director of Programs	\$115,200	1.00	32%	0.32	\$36,864	\$36,864	\$36,864	\$36,864	\$147,456
19					-					
20					-					
21					-					
22					-					
23					-					
24					-					
25					-					
26					-					
27					-					
28					-					
29	TOTALS	\$466,091	10.00	49%	4.92	\$318,272	\$318,272	\$318,272	\$318,272	\$1,273,088
30										
31	FRINGE BENEFIT RATE	22%								
32	EMPLOYEE FRINGE BENEFITS	\$102,540				\$70,020	\$70,020	\$70,020	\$70,020	\$280,080
33										
34										
35	TOTAL SALARIES & BENEFITS	\$568,631				\$388,292	\$388,292	\$388,292	\$388,292	\$1,553,168
36	HSA #2									10/25/2016

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3													
4	Program Name:												
5	Care Navigation and Peer Support												
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	<u>Expenditure Category</u>			TERM	<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>					TOTAL <u>7/1/23-6/30/27</u>
13	Rental of Property				\$21,454	\$21,454	\$21,454	\$21,454					\$85,816
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$5,854	\$5,854	\$5,854	\$5,854					\$23,416
15	Office Supplies, Postage				\$5,121	\$5,121	\$5,121	\$5,121					\$20,484
16	Building Maintenance Supplies and Repair				\$3,508	\$3,508	\$3,508	\$3,508					\$14,032
17	Printing and Reproduction												\$0
18	Insurance				\$3,367	\$3,367	\$3,367	\$3,367					\$13,468
19	Staff Training				\$3,000	\$3,000	\$3,000	\$3,000					\$12,000
20	Staff Travel-(Local & Out of Town)												
21	Rental of Equipment												
22	<u>CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE</u>												
23													
24													
25													
26													
27	OTHER												
28	Client-Related Travel				\$3,108	\$3,108	\$3,108	\$3,108					\$12,432
29	Client Supplies				\$6,900	\$6,900	\$6,900	\$6,900					\$27,600
30	Electronic Client Management				\$3,993	\$3,993	\$3,993	\$3,993					\$15,972
31	Client Outreach				\$3,600	\$3,600	\$3,600	\$3,600					\$14,400
32	IT Support				\$11,000	\$11,000	\$11,000	\$11,000					\$44,000
33													
34	TOTAL OPERATING EXPENSE				\$70,905	\$70,905	\$70,905	\$70,905					\$283,620
35													
36	HSA #3											10/25/2016	

	A	B	C	D	E	F	G
1	Appendix B, Page 4						
2							
3							
4	Program Name:						
5	Care Navigation and Peer Support						
6							
7	Program Expenditure Detail						
8							
9							
10	EQUIPMENT		7/1/23-6/30/24	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	TOTAL
11	No.	ITEM/DESCRIPTION					
12		n/a					
13							
14							
15							
16							
17							
18							
19							
20	TOTAL EQUIPMENT COST						
21							
22	Subcontractors		7/1/23-6/30/24	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	TOTAL
23	Description:						
24		Meghan Hynes, Evaluation and Outreach Consultant	8500	8500	8,500	8,500	34,000
25		Curry Senior Center	95000	95000	95,000	95,000	380,000
26							
27							
28							
29	TOTAL REMODEL COST		103,500	103,500	103,500	103,500	414,000
30							
31	TOTAL CAPITAL EXPENDITURE		103,500	103,500	103,500	103,500	414,000
32	(Equipment and Remodeling Cost)						
33	HSA #4						10/25/2016

ATTACHMENT 3 - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: Shanti Project

FISCAL YEAR: FY2023-2024-FY2027-2028

CONTRACT: Care Navigation and Peer Support

DIRECTOR: Kimberly Scrafano, CEO

PHONE NO.: 415-674-4710

<u>SITES:</u> Name of Site	Shanti Project	Shanti Project	Curry Senior Center		
Address and Zip	3170 23 rd Street, San Francisco, CA 94110	730 Polk Street, San Francisco, CA 94109	315 Turk Street San Francisco CA 94102		
Phone Number	415-979-9550	415-674-4754	415-920-1351		
Fax Number	415-979-9269	415-674-0371	415-885-2344		
Neighborhood	Mission	Tenderloin	Tenderloin		
Muni Line #s	47, 49	49, 19	31, F, J, K, L, M, N		
Person in Charge	Kimberly Scrafano	Kimberly Scrafano	Dave Knego		
Site Manager	Prado Gomez	Prado Gomez	Daniel Hill		
Programs Offered at Site	Isolation Prevention, Care Navigation and Peer Support programming, Animal Bonding – PAWS, HIV Services (Individual & Group services), Senior HIV Services, Social Integration Activities, Women's Cancer Services, Women's Cancer Wellness services, Shanti Model Volunteer Training	Isolation Prevention, Care Navigation and Peer Support programming, Animal Bonding – PAWS, HIV Services (Individual & Group services), Senior HIV Services, Social Integration Activities, Women's Cancer Services, Women's Cancer Wellness services, Volunteer support groups	Social Groups, Dining Room, Case Management, Behavioral Health, Peer Social isolation, Tech and Wellness		
Days Open	<u> </u> <u> </u> Mon <u> </u> <u> </u> Tues <u> </u> <u> </u> Wed <u> </u> <u> </u> Thur <u> </u> <u> </u> Fri <u> </u> <u> </u> Sat <u> </u> Sun	<u> </u> <u> </u> Mon <u> </u> <u> </u> Tues <u> </u> <u> </u> Wed <u> </u> <u> </u> Thur <u> </u> <u> </u> Fri <u> </u> Sat <u> </u> Sun	<u> </u> <u> </u> Mon <u> </u> <u> </u> Tues <u> </u> <u> </u> Wed <u> </u> <u> </u> Thur <u> </u> <u> </u> Fri <u> </u> <u> </u> Sat <u> </u> Sun	<u> </u> Mon <u> </u> Tues <u> </u> Wed <u> </u> Thur <u> </u> Fri <u> </u> Sat <u> </u> Sun	<u> </u> Mon <u> </u> Tues <u> </u> Wed <u> </u> Thur <u> </u> Fri <u> </u> Sat <u> </u> Sun
Hours Open	M-F 10am-6pm Sat 11-1pm (PAWS Food Bank Only)	M-F 9am-6pm	M-F 8 am-430 pm Sat 9-130		
Hours of <u>scheduled</u> programming	10am-6pm M-F Sat 11-1pm (PAWS Food Bank Only) Varies M-S for Peer Support Volunteers	M-F 9am-6pm	M-F 9-430 Sat 9-130		

Total number of service days in FY	298	298	354		
Days closed	New Year's Day Martin Luther King Day Presidents Day Cesar Chavez Day Memorial Day Juneteenth Independence Day Labor Day Indigenous People's Day Federal Election Day (Even Years Only) Veteran's Day Thanksgiving Day The Friday after Thanksgiving Christmas Eve Christmas	New Year's Day Martin Luther King Day Presidents Day Cesar Chavez Day Memorial Day Juneteenth Independence Day Labor Day Indigenous People's Day Federal Election Day (Even Years Only) Veteran's Day Thanksgiving Day The Friday after Thanksgiving Thanksgiving Christmas Eve Christmas	Sundays and Federal Holidays		
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**APPENDIX A – Services to be Provided
Shanti Project**

**Social Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities
July 1, 2023 -- June 30, 2027**

I. Purpose

Limited supportive services are available to address the emotional, behavioral, health, and social isolation challenges faced by lesbian, gay, bisexual, and transgender older adults, and adults with disabilities. This grant seeks to address these issues through the implementation of a program utilizing 1) care navigation, 2) peer support, and 3) supportive programming.

II. Definitions

Adult with a Disability	A person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing Online System
Care Navigation	Includes the following: intake, follow up, on-going assessment, information and referral, on-going care coordination, matching and support of client-volunteer peer support matches, facilitation of peer support volunteer trainings, facilitation of drop-in services, support group facilitation, peer-based psychosocial support (including practical assistance and emotional support).
Care Navigator	An individual that is trained to facilitate service connections for older adults and adults with disabilities to available resources in the City to help maintain well-being and promote stability in the community. Care navigators are skilled at navigating the system of services for eligible consumers. Care navigators are not required to have specific licensure or graduate-level training.
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

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	Shanti Project
Isolation	For the purpose of this grant, isolation is defined as combination of 2 or more of the following factors: self-reported feelings of isolation, mild to moderate depression, lack of natural or reliable supports, chronic illness or conditions, need for emotional and practical support, lack of engagement with available community-based, natural or social supports, and other additional factors that indicate 1:1 in home and wraparound support would be beneficial.
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 measure is only used by consumers to self-identify their income status, not to be used as means test to qualify for programs.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Older Adult	Person who is 60 years or older
Peer Support	Includes the use of paid staff, student-interns, and peer support volunteers. Peer support services include emotional and practical support via regular interactions with clients such as social visits, accompaniment to appointments or events, and other assistance.
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	San Francisco Human Services Agency
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).

Supportive Programming	Includes the following: individual emotional and behavioral support, peer support groups (including abstinence-based and substance-use management groups), social activities, wellness and health education and training sessions, peer health activities, and early intervention programs.
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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

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*
- An individual who is socially isolated *and*
- A resident of the City and County of San Francisco

IV. Description of Services

The Isolation Prevention Services seeks to blend the following three models of service to address the emotional, practical, behavioral health and service needs of LGBTQ+ older adults and adults with disabilities.

1. Care Navigation: Care navigators serve as the main point of contact for clients and provide services that include, but are not limited to intake, follow up, ongoing assessment and care coordination, information and referral, and facilitation of drop-in services. Care navigators help with the development and utilization of peer support volunteers who, in turn, help support clients participating in the program. Care navigators match peer support volunteers with clients and assist with facilitation of peer support volunteer trainings, support group facilitation, and peer-based psychosocial support (including practical assistance and emotional support).

Care navigator qualifications are based on expertise in providing harm reduction-based coordination, advocacy, and/or psychosocial support to at-risk communities, and therefore these positions are not required to have specific licensure or graduate-level training. Care navigators are evaluated for experience and competence in serving severe need populations and targeted communities.

2. **Peer Support:** Peer support volunteers provide outreach and supportive services for isolated, LGBTQ+ older adults, adults with disabilities living with emotional and behavioral health challenges. Use of a peer support network provides an innovative service delivery framework for a target population that may be reluctant to seek traditional health and social services due to a history of discrimination and marginalization.

Grantee will implement an assessment and training program for peer volunteers prior to matching them to clients. Assessment should include evaluation of a volunteer’s physical and mental health status and ability to provide support as intended by this program element. Training should be comprehensive and cover LGBTQ+ cultural competency, boundaries, aging and disabilities, the grieving process, suicide ideation, clinical issues (including cognitive impairment), psychosocial issues, harm reduction models, and the peer counseling/support model.

3. **Support Programming:** This program seeks to create and increase the number of social connective programs and wellbeing programs that support and enhance the emotional and behavioral wellbeing of underserved LGBTQ+ older adults and adults with disabilities. These connective programs shall consist of:
 - a. individual emotional and behavioral support,
 - b. peer support groups, including abstinence-based and substance-use management groups, social activities,
 - c. wellbeing and health related education and activities, and
 - d. outreach and early intervention programs

V. Location and Time of Services

Details of the sites and operation hours are as attached in the Site Chart (Appendix F.)

VI. Service Objectives

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

	FY23/24	FY 24/25	FY 25/26	FY 26/27
Unduplicated isolated LGBTQ+ consumers.	90	90	90	90
Hours of Care Navigation	1750	1750	1750	1750
Volunteer Recruitment and Development Services	20	20	20	20
Peer Support Hours	1500	1500	1500	1500
Support programming to consumers	2000	2000	2000	2000

VII. 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. Consumers and peer support volunteers will complete surveys. The annual survey is subject to DAS input and approval. On an annual basis, Grantee will meet the following Outcome Objectives:

- Consumers will respond to an annual consumer satisfaction survey. Target: 50%.
- Peer support volunteers will respond to an annual volunteer survey. Target: 50%.
- Consumers responding to an annual consumer satisfaction survey will be satisfied (or better) with services and find it beneficial to them. Target: 70%.
- Peer support volunteers responding to an annual consumer satisfaction survey report that their training was comprehensive and helpful to their program role. Target: 70%.
- Consumers responding to an annual consumer satisfaction survey will report reduced isolation or prevention of isolation by their engagement in care navigation, and volunteer peer support activities, or supportive programming. Target: 70%.

VIII. Reporting Requirements

- A. Grantee will provide various reports during the term of the grant agreement.
- B. Grantee will enter consumers' data into the SF DAS GetCare-SF Connected module.
- C. 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.
- D. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- E. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- F. 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.
- G. Grantee will provide an annual consumer satisfaction survey report to DAS by March 15 or a date agreed upon by DAS and grantee each grant year.
- H. Grantee will provide Ad Hoc reports as requested by HSA/DAS/OCP.
- I. Grantee will develop and deliver a bi-annual summary report of SOGI data collected as requested by HSA/DAS. The due dates for submitting the summary reports are January 10th (for July 1 – December 31 data) and July 10th (for January 1 – June 30 data).

J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

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

Tara Alvarez, Contract Manager
Human Services Agency
P.O. Box 7988
San Francisco, CA 94120-7988
E-mail: Tara.Alvarez@sfgov.org

Noah Gallo, Administrative Analyst
Office of Community Partnerships
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Email: Noah.Gallo1@sfgov.org

IX. 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 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; 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; board of director list; and whether services are provided appropriately according to Sections IV, VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name <u>Shanti Project</u>				Term	
6					7/1/23-6/30/27	
7	(Check One) <input checked="" type="checkbox"/> New Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod. No. of Mod.					
9	Program: Social Isolation Prevention Services					
10	Budget Reference Page No.(s)					
11	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
12	Expenditures					
13	Salaries & Benefits	\$287,359	\$287,359	\$287,359	\$287,359	\$1,149,436
14	Operating Expense	\$52,196	\$52,196	\$52,196	\$52,196	\$208,784
15	Subtotal	\$339,555	\$339,555	\$339,555	\$339,555	\$1,358,220
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$52,058	\$52,058	\$52,058	\$52,058	\$208,232
18	Capital & Subcontractor Expenditure	\$119,500	\$119,500	\$119,500	\$119,500	\$478,000
19	Total Expenditures	\$511,113	\$511,113	\$511,113	\$511,113	\$2,044,452
20	HSA Revenues					
21	General Fund	\$511,113	\$511,113	\$511,113	\$511,113	\$2,044,452
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$511,113	\$511,113	\$511,113	\$511,113	\$2,044,452
30	Other Revenues					
31						
32	Metta Fund	\$37,500	\$37,500	\$37,500	\$37,500	\$150,000
33	In-Kind Volunteers	\$45,000	\$45,000	\$45,000	\$45,000	\$180,000
34						
35						
36	Total Revenues	\$593,613	\$593,613	\$593,613	\$593,613	\$2,374,452
37	Full Time Equivalent (FTE)	3.44	3.44	3.44	3.44	13.76
39	Prepared by: Eric Sutter		Telephone No.: (510) 593-7076		Date: 5/3/23	
40	HSA-CO Review Signature: _____					
41	HSA #1					10/25/2016

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3										
4	Program Name:									
5	Social Isolation Prevention Services									
6										
7	Salaries & Benefits Detail									
8										
9										
10										
11						7/1/23-6/30/24	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	
		Agency Totals		HSA Program						TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	7/1/23-6/30/27
12	POSITION TITLE									
13	Care Navigator	\$57,506	1.00	100%	1.00	\$57,506	\$57,506	\$57,506	\$57,506	\$230,024
14	Wellness Coordinator	\$60,489	1.00	100%	1.00	\$60,489	\$60,489	\$60,489	\$60,489	\$241,956
15	Program Manager	\$72,500	1.00	75%	0.75	\$54,375	\$54,375	\$54,375	\$54,375	\$217,500
16	Volunteer Services Coordinator	\$67,490	1.00	10%	0.10	\$6,749	\$6,749	\$6,749	\$6,749	\$26,996
17	Volunteer Services Manager	\$68,909	1.00	20%	0.20	\$13,782	\$13,782	\$13,782	\$13,782	\$55,128
18	Volunteer Services Director	\$82,500	1.00	7%	0.07	\$5,775	\$5,775	\$5,775	\$5,775	\$23,100
19	Sr. Director of Programs	\$115,200	1.00	32%	0.32	\$36,864	\$36,864	\$36,864	\$36,864	\$147,456
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$524,594	7.00	49%	3.44	\$235,540	\$235,540	\$235,540	\$235,540	\$942,160
31										
32	FRINGE BENEFIT RATE	22%								
33	EMPLOYEE FRINGE BENEFITS	\$115,411				\$51,819	\$51,819	\$51,819	\$51,819	\$207,276
34										
35										
36	TOTAL SALARIES & BENEFITS	\$640,005				\$287,359	\$287,359	\$287,359	\$287,359	\$1,149,436
37	HSA #2									10/25/2016

	A	B	C	D	E	F	G
1	Appendix B, Page 4						
2							
3							
4	Program Name:						
5	Social Isolation Prevention Services						
6							
7	Program Expenditure Detail						
8							
9							
10	EQUIPMENT		7/1/23-6/30/24	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	TOTAL
11	No.	ITEM/DESCRIPTION					
12		n/a					
13							
14							
15							
16							
17							
18							
19							
20	TOTAL EQUIPMENT COST						
21							
22	Subcontractors						
23	Description:		7/1/23-6/30/24	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	TOTAL
24	Meghan Hynes, Evaluation and Outreach Consultant		\$7,500	\$7,500	\$7,500	\$7,500	30,000
25	Curry Senior Center		\$52,000	\$52,000	\$52,000	\$52,000	208,000
26	Openhouse SF		\$60,000	\$60,000	\$60,000	\$60,000	240,000
27							
28							
29	TOTAL REMODEL COST		119,500	119,500	119,500	119,500	478,000
30							
31	TOTAL CAPITAL EXPENDITURE		119,500	119,500	119,500	119,500	478,000
32	(Equipment and Remodeling Cost)						
33	HSA #4						10/25/2016

ATTACHMENT 3 - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: Shanti Project

FISCAL YEAR: FY2023-2024-FY2027-2028

CONTRACT: Social Isolation Prevention for LGBTQ+ Older Adults and Adults with Disabilities

DIRECTOR: Kimberly Scrafano, CEO

PHONE NO.: 415-674-4710

SITES: Name of Site	Shanti Project	Shanti Project	Curry Senior Center	Openhouse at the Bob Ross LGBT Senior Center	Openhouse Community Center: Morton B. Blatt and Peter C. Helmsstrom LGBTQ+
Address and Zip	3170 23 rd Street, San Francisco, CA 94110	730 Polk Street, San Francisco, CA 94109	315 Turk Street San Francisco CA 94102	65 Laguna Street, 94102	75 Laguna, 94102
Phone Number	415-979-9550	415-674-4754	415-920-1351	415-296-8995	415-296-8995
Fax Number	415-979-9269	415-674-0371	415-885-2344	415-296-8008	415-296-8008
Neighborhood	Mission	Tenderloin	Tenderloin	Hayes Valley/Castro, D8	Hayes Valley/Castro, D8
Muni Line #s	47, 49	49, 19	31, F, J, K, L, M, N	F, 6, 7, 14, 22, 49	F, 6, 7, 14, 22, 49
Person in Charge	Kimberly Scrafano	Kimberly Scrafano	Dave Knego	Kathleen Sullivan, Ph.D. (she/her)	Kathleen Sullivan, Ph.D. (she/her)
Site Manager	Prado Gomez	Prado Gomez	Daniel Hill	Executive Director Charity Horst (she/her) Operations Manager	Executive Director Charity Horst (she/her) Operations Manager
Programs Offered at Site	Isolation Prevention, Care Navigation and Peer Support programming, Animal Bonding – PAWS, HIV Services (Individual & Group services), Senior HIV Services, Social Integration Activities, Women's Cancer Services, Women's Cancer Wellness services, Shanti Model Volunteer Training	Isolation Prevention, Care Navigation and Peer Support programming, Animal Bonding – PAWS, HIV Services (Individual & Group services), Senior HIV Services, Social Integration Activities, Women's Cancer Services, Women's Cancer Wellness services, Volunteer support groups	Social Groups, Dining Room, Case Management, Behavioral Health, Peer Social isolation, Tech and Wellness	Case Management; ADRC; Mental Health Services	Community Day Services (Club 75); Lifelong Learning; Community Engagement; Friendly Visitor; Volunteer Services; Drag Bingo; Rainbow Lunch
Days Open	<u> </u> <u> </u> Mon <u> </u> <u> </u> Tues <u> </u> <u> </u> Wed <u> </u> <u> </u> Thur <u> </u> <u> </u> Fri <u> </u> <u> </u> Sat <u> </u> Sun	<u> </u> <u> </u> Mon <u> </u> <u> </u> Tues <u> </u> <u> </u> Wed <u> </u> <u> </u> Thur <u> </u> <u> </u> Fri <u> </u> <u> </u> Sat <u> </u> Sun	<u> </u> <u> </u> Mon <u> </u> <u> </u> Tues <u> </u> <u> </u> Wed <u> </u> <u> </u> Thur <u> </u> <u> </u> Fri <u> </u> <u> </u> Sat <u> </u> Sun	<u> </u> <u> </u> Mon <u> </u> <u> </u> Tues <u> </u> <u> </u> Wed <u> </u> <u> </u> Thur <u> </u> <u> </u> Fri <u> </u> <u> </u> Sat <u> </u> Sun	<u> </u> <u> </u> Mon <u> </u> <u> </u> Tues <u> </u> <u> </u> Wed <u> </u> <u> </u> Thur <u> </u> <u> </u> Fri <u> </u> <u> </u> Sat <u> </u> Sun
Hours Open	M-F 10am-6pm Sat 11-1pm (PAWS Food Bank Only)	M-F 9am-6pm	M-F 8 am-430 pm Sat 9-130	8 hours M-F: 9:30 a.m. – 5:30 p.m.	8 hours M-F: 9:30 a.m. – 5:30 p.m. 6 hours Sat 10:00 a.m. – 4:00 p.m.
Hours of <u>scheduled</u> programming	10am-6pm M-F Sat 11-1pm (PAWS Food Bank Only)	M-F 9am-6pm	M-F 9-430 Sat 9-130	8 hours M-F: 9:30 a.m. – 5:30 p.m.	8 hours M-F: 9:30 a.m. – 5:30 p.m. 6 hours Sat 10:00 a.m. –

	Varies M-S for Peer Support Volunteers				4:00 p.m.
Total number of service days in FY	298	298	354	236	236
Days closed	New Year's Day Martin Luther King Day Presidents Day Cesar Chavez Day Memorial Day Juneteenth Independence Day Labor Day Indigenous People's Day Federal Election Day (Even Years Only) Veteran's Day Thanksgiving Day The Friday after Thanksgiving Christmas Eve Christmas	New Year's Day Martin Luther King Day Presidents Day Cesar Chavez Day Memorial Day Juneteenth Independence Day Labor Day Indigenous People's Day Federal Election Day (Even Years Only) Veteran's Day Thanksgiving Day The Friday after Thanksgiving Christmas Eve Christmas	Sundays and Federal Holidays	129	129
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – Services to be Provided
Shanti Project
Animal Bonding Services for Isolated LGBTQ+
Older Adults and Adults with Disabilities
July 1, 2023 -- June 30, 2027

I. Purpose

The purpose of this grant is to provide animal bonding services to LGBTQ+ older adults and adults with disabilities. Pets are a powerful source of companionship and support for their pet owners but can easily become a difficult responsibility for isolated and vulnerable individuals. Sustaining the human-animal bond can be critical to the health and well-being of those individuals. This grant seeks to address these issues through care navigation, peer support, and pet care resources.

II. Definitions

Activities of Daily Living (ADLs)	Activities of Daily Living, or ADLs, is a term referring to basic self-care tasks. These activities are fundamental in caring for oneself and maintaining independence. ADLs include eating, dressing, transfer, bathing, toileting, and grooming.
Adult with a Disability	A person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing Online System
Care Navigation	Includes the following: intake, follow up, on-going assessment, information and referral, on-going care coordination, matching and support of client-volunteer peer support matches, facilitation of peer support volunteer trainings, facilitation of drop-in services, support group facilitation, peer-based psychosocial support (including practical assistance and emotional support).
Care Navigator	An individual that is trained to facilitate service connections for older adults and adults with disabilities to available resources in the City to help maintain well-being and promote stability in the community. Care navigators are skilled at navigating the system of services for eligible

	consumers. Care navigators are not required to have specific licensure or graduate-level training.
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
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	Shanti Project
IADLs	Instrumental Activities of Daily Living (IADLs) are activities related to independent living and include preparing meals, managing money, shopping for groceries or personal items, performing light or heavy housework, doing laundry, and using a telephone.
Isolation	For the purpose of this grant, isolation is defined as combination of 2 or more of the following factors: self-reported feelings of isolation, mild to moderate depression, lack of natural or reliable supports, chronic illness or conditions, need for emotional and practical support, lack of engagement with available community-based, natural or social supports, and other additional factors that indicate 1:1 in home and wraparound support would be beneficial.
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.
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older
Peer Support	Includes the use of paid staff, student-interns, and peer support volunteers. Peer support services include emotional and practical support via regular interactions with clients such as social visits, accompaniment to appointments or events, and other assistance.

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	San Francisco Human Services Agency
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).
Supportive Programming	Includes the following: individual emotional and behavioral support, peer support groups (including abstinence-based and substance-use management groups), social activities, wellness and health education and training sessions, peer health activities, and early intervention programs.

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

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*
- An individual who is socially isolated *and*
- An individual with pets *and*
- A resident of the City and County of San Francisco

IV. Description of Services

This program serves isolated clients who identify as LGBTQ+ older adults and LGBTQ+ adults with disabilities. Due to the adverse health effects of isolation, it is critical to provide isolation prevention and reduction support. Supportive pet care services are helpful for many people, but they are essential for many isolated LGBTQ+ individuals. Dedicated to

preserving the human-animal bond, Shanti Project's Pets Are a Wonderful Support Program (PAWS) keeps people and their companion animals together.

Research has shown the LGBTQ+ community is more likely to face discrimination than their heterosexual and cisgender peers, including experiencing harmful interactions with service providers. This is also the case in veterinary offices, especially if they are visibly transgender, a queer person of color, and particularly if they are low-income. This program works closely with its veterinary office partners by providing in-service training on how to support clients, education about queer identities and trauma-informed care. It also provides financial assistance for veterinary care. Discrimination on transportation including taxis and rideshares has also been reported. This program provides safe and reliable transportation where a well-screened volunteer will bring the pet and client to the veterinary office.

Establishing a strong rapport and trust with providers is also important for LGBTQ+ community members. LGBTQ+ clients often report that they do not trust some providers to be both queer-competent and to understand the value and role that their animal companion plays in their lives. With this program, clients often feel comfortable sharing emerging life challenges and their medical concerns, which creates opportunities to connect clients with other resources and services when their unmet needs are identified.

The Isolation Prevention Services seeks to blend the following three models of service to address the emotional, practical, behavioral health and service needs of LGBTQ+ older adults and adults with disabilities.

1. *Care Navigation*: Care navigators serve as the main point of contact for clients and provide services that include, but are not limited to intake, follow up, ongoing assessment and care coordination, information and referral, and facilitation of drop-in services. Care navigators help with the development and utilization of peer support volunteers who, in turn, help support clients participating in the program. Care navigators match peer support volunteers with clients and assist with facilitation and dedication of pet care services and resources, peer support volunteer trainings, and peer-based psychosocial support (including practical assistance and emotional support).
 - a. Care navigator qualifications are based on expertise in providing harm reduction-based coordination, advocacy, and/or psychosocial support to at-risk communities, and therefore these positions are not required to have specific licensure or graduate-level training. Care navigators are evaluated for experience and competence in serving severe need populations and targeted communities.
2. *Peer Support*: Peer support volunteers provide outreach and supportive services for isolated, LGBTQ+ older adults and adults with disabilities who need pet support services. Use of a peer support network provides an innovative service delivery framework for a LGBTQ+ population that may be reluctant to seek support services for themselves or their animal companions.
 - a. Grantee will implement an assessment and training program for peer volunteers prior to matching them to clients. Assessment should include evaluation of a volunteer's physical and mental health status and ability to provide support as

intended by this program element. Training should be comprehensive and cover LGBTQ+ cultural competency, boundaries, aging and disabilities, the grieving process, suicide ideation, clinical issues (including cognitive impairment), psychosocial issues, harm reduction models, and the peer counseling/support model.

3. *Animal Bonding Services*: Through intake and assessment, Grantee for Animal Bonding Services will determine pet care resources that best fit each client’s needs. Care options include but are not limited to the following:

- a. Pet Food Bank: Clients are entitled to one visit every 4 weeks. Homebound clients can register for the food delivery program. Prescription food is also available with a vet prescription.
- b. Annual Wellness Exam: Each registered pet may receive one free exam and a set of vaccinations each year through collaboration with a community pet service organization. Clients may also qualify for financial assistance with veterinary services, emergency pet services, and diagnostics like x-rays or biopsies.
- c. Supportive Pet Care Services: Supportive services include dog walking (regular exercise for pets whose guardians are homebound); in-home cat care (litterbox maintenance or feeding); transportation (to and from veterinary appointments); emergency foster care (during client emergencies, such as client hospitalization or loss of housing).

V. Location and Time of Services

Shanti is located at 3170 23rd Street and open Monday-Friday from 10am to 6pm. Additionally, the pet food bank is open on Saturdays from 11:00am-1:00pm. Peer Support hours will vary Monday through Saturday.

VI. Service Objectives

On an annual basis, Grantee will meet the following Service Objectives for the Animal Bonding Services:

	FY23/24	FY 24/25	FY 25/26	FY 26/27
Unduplicated Consumers	221	221	221	221
Hours of Care Navigation	2709	2709	2709	2709
Volunteers recruited and developed	43	43	43	43
Peer Support Hours	3810	3810	3810	3810

VII. 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. The annual survey is subject to DAS input and approval. On an annual basis, Grantee will meet the following Outcome Objectives:

- Consumers will respond to an annual consumer satisfaction survey. Target: 50%
- Peer support volunteers will respond to an annual volunteer survey. Target 50%
- At intake or re-enrollment consumers will identify as LGBTQ+. Target: 50%
- Consumers responding to an annual consumer satisfaction survey will report that participation in this program allowed them to keep their animal. Target 70%
- Consumers responding to an annual consumer satisfaction survey will indicate that participation in this program helped improve their perceived health and/or well-being. Target 70%
- Peer support volunteers responding to an annual volunteer survey report that their training was comprehensive and helpful to their program role. Target 70%
- Consumers responding to an annual consumer satisfaction survey will report reduced isolation or prevention of isolation by their engagement in care navigation, volunteer peer support activities, and animal support services. Target 70%

VIII. Reporting Requirements

- A. Grantee will enter into SF DAS GetCare the client data including the Intake Form by the 5th working day of the month for the preceding month's services.
- B. Grantee will enter into SF DAS GetCare all the units of service in the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Monthly reports must be entered into the Contracts Administration, Billing and Reporting Online (CARBON) system for each unit of service delivered during the reporting period for each service listed in Section VI.
- D. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of the following fiscal year. This report must be submitted to the CARBON system.
- E. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to Appendices within the Grant Agreement.
- F. 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.
- G. Grantee will provide an annual client satisfaction survey report to OCP by March 15 each grant year.
- H. Grantee will report at the end of the fiscal year the numbers of referrals from PAWS to the Community Living Fund program for intensive case management services.
- I. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAS/HSA. The due date for submitting the bi-annual summary report is January 10 and July 10.

- J. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- K. Grantee will develop and maintain with OCP approval, an updated Site Chart (using the OCP format) with details about the program.
- L. For assistance with reporting requirements or submission of reports, please contact:

Tara Alvarez, Contract Manager
Human Services Agency
P.O. Box 7988
San Francisco, CA 94120-7988
E-mail: tara.alvarez@sfgov.org

Noah Gallo, Administrative Analyst
Office of Community Partnerships
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Email: Noah.Gallo1@sfgov.org

IX. 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 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; 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; board of director list; and whether services are provided appropriately according to Sections IV, VI, and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name <u>Shanti Project</u>				Term	
6					7/1/23-6/30/27	
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.			No. of Mod.		
9	Program: Animal Bonding Services					
10	Budget Reference Page No.(s)					
11	Program Term					
12	Expenditures					
13	Salaries & Benefits	\$571,548	\$571,548	\$571,548	\$571,548	\$2,286,192
14	Operating Expense	\$414,535	\$414,535	\$414,535	\$414,535	\$1,658,140
15	Subtotal	\$986,083	\$986,083	\$986,083	\$986,083	\$3,944,332
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$147,913	\$147,913	\$147,913	\$147,913	\$591,652
19	Total Expenditures	\$1,133,996	\$1,133,996	\$1,133,996	\$1,133,996	\$4,535,984
20	HSA Revenues					
21	General Fund	\$1,133,996	\$1,133,996	\$1,133,996	\$1,133,996	\$4,535,984
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$1,133,996	\$1,133,996	\$1,133,996	\$1,133,996	\$4,535,984
30	Other Revenues					
31						
32	Foundation Grants	\$69,000	\$69,000	\$69,000	\$69,000	\$276,000
33	In-Kind Donated Vet Services	\$25,000	\$69,000	\$69,000	\$69,000	\$232,000
34	In-Kind Pet Food, Supplies	\$30,000	\$30,000	\$30,000	\$30,000	\$120,000
35	In-Kind Volunteers	\$140,310	\$140,310	\$140,310	\$140,310	\$561,240
36						
37	Total Revenues	\$1,398,306	\$1,442,306	\$1,442,306	\$1,442,306	\$5,725,224
38	Full Time Equivalent (FTE)	7.29	7.29	7.29	7.29	29.17
40	Prepared by: Katherine D'Amato		Telephone No.: (415) 517-5536		Date: 5/3/23	
41	HSA-CO Review Signature: _____					
42	HSA #1 10/25/2016					

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3										
4	Program Name:									
5	Animal Bonding Services									
6										
7	Salaries & Benefits Detail									
8										
9										
10										
11						7/1/23-6/30/24	7/1/24-6/30/25	7/1/25-6/30/26	7/1/26-6/30/27	
		Agency Totals		HSA Program						TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	7/1/23-6/30/27
12	POSITION TITLE									
13	Program Director	\$87,500	1.00	75%	0.75	\$65,625	\$65,625	\$65,625	\$65,625	\$262,500
14	Program Manager	\$69,120	1.00	60%	0.60	\$41,472	\$41,472	\$41,472	\$41,472	\$165,888
15	Food Bank Manager	\$70,500	1.00	75%	0.75	\$52,875	\$52,875	\$52,875	\$52,875	\$211,500
16	Care Navigators	\$59,857	4.00	61%	2.42	\$144,854	\$144,854	\$144,854	\$144,854	\$579,416
17	Volunteer Coordinator	\$59,397	1.00	72%	0.72	\$42,766	\$42,766	\$42,766	\$42,766	\$171,064
18	Food Bank Coordinator	\$60,489	1.00	67%	0.67	\$40,528	\$40,528	\$40,528	\$40,528	\$162,112
19	Veterinary Billing Administrator	\$59,904	0.85	59%	0.50	\$29,952	\$29,952	\$29,952	\$29,952	\$119,808
20	Program Assistant	\$57,506	1.00	75%	0.75	\$43,130	\$43,130	\$43,130	\$43,130	\$172,520
21	Food Bank Assistant	\$54,600	0.13	100%	0.13	\$7,280	\$7,280	\$7,280	\$7,280	\$29,120
22										
23										
24										
25										
26										
27										
28										
29	TOTALS	\$578,873	10.98	66%	7.29	\$468,482	\$468,482	\$468,482	\$468,482	\$1,873,928
30										
31	FRINGE BENEFIT RATE	22%								
32	EMPLOYEE FRINGE BENEFITS	\$127,352				\$103,066	\$103,066	\$103,066	\$103,066	\$412,264
33										
34										
35	TOTAL SALARIES & BENEFITS	\$706,225				\$571,548	\$571,548	\$571,548	\$571,548	\$2,286,192
36	HSA #2	10/25/2016								

