



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

MEMORANDUM

Department of Disability
and Aging Services

TO:

DISABILITY AND AGING SERVICES COMMISSION

THROUGH:

KELLY DEARMAN, EXECUTIVE DIRECTOR

FROM:

CINDY KAUFFMAN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DS
EE

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

DATE:

JULY 19, 2023

SUBJECT:

NEW GRANTS: **MULTIPLE GRANTEES (NON-PROFIT)** TO
PROVIDE COMMUNITY SERVICES FOR OLDER ADULTS AND
ADULTS WITH DISABILITIES (SEE TABLE BELOW)

**GRANT
TERM:**

7/1/2023-6/30/2027

**GRANT
AMOUNT:**

New	Contingency	Total
\$47,954,320	\$4,795,432	\$52,749,752

**ANNUAL
AMOUNT:**

SEE TABLE BELOW



London Breed
Mayor

Trent Rhorer
Executive Director

Funding Source

FUNDING:

PERCENTAGE:

<u>County</u>	<u>State</u>	<u>Contingency</u>	<u>Total</u>
\$47,954,320		\$4,795,432	\$52,749,752
100%			100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with multiple providers for the period of July 1, 2023 through June 30, 2027, in an amount of \$47,954,320, plus a 10% contingency for a total amount not to exceed \$52,749,752. The purpose of the grant agreements is to provide Community Services to older adults and adults with disabilities.



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Agency	Annual Grant Amount	Total Grant Amount 7/1/23-6/30/27	10% Contingency	Not to Exceed
Bayanihan Equity Center	\$499,601	\$1,998,404	\$199,840	\$2,198,244
Bayview Hunters Pt Multipurpose Sr Svc				
Dr Davis Senior Center	\$1,176,203	\$4,704,812	\$470,481	\$5,175,293
Bayview Hunters Pt Multipurpose Sr Svc				
Rosa Parks Senior Center	\$371,431	\$1,485,724	\$148,572	\$1,634,296
Bayview Hunters Pt Multipurpose Sr Svc				
Western Addition Senior Center	\$370,334	\$1,481,336	\$148,134	\$1,629,470
Bernal Heights Neighborhood Center Cortland	\$308,388	\$1,233,552	\$123,355	\$1,356,907
Bernal Heights Neighborhood Center Excelsior	\$386,131	\$1,544,524	\$154,452	\$1,698,976
Booker T. Washington Community Service Center	\$220,000	\$880,000	\$88,000	\$968,000
Catholic Charities	\$700,291	\$2,801,164	\$280,116	\$3,081,280
Centro Latino de San Francisco, Inc.	\$140,504	\$562,016	\$56,202	\$618,218
Curry Senior Center	\$697,597	\$2,790,388	\$279,039	\$3,069,427
Episcopal Community Services	\$315,657	\$1,262,628	\$126,263	\$1,388,891
Felton Institute	\$299,370	\$1,197,480	\$119,748	\$1,317,228
Golden Gate Senior Services Castro Senior Center	\$233,444	\$933,776	\$93,378	\$1,027,154
Golden Gate Senior Services Richmond Senior Center	\$498,506	\$1,994,024	\$199,402	\$2,193,426
Independent Living Resource Center of San Francisco	\$136,269	\$545,076	\$54,508	\$599,584
Kimochi, Inc.	\$310,590	\$1,242,360	\$124,236	\$1,366,596
Lighthouse For the Blind and Visually Impaired	\$121,872	\$487,488	\$48,749	\$536,237
Mission Neighborhood Centers	\$609,828	\$2,439,312	\$243,931	\$2,683,243
On Lok Day Services	\$535,465	\$2,141,860	\$214,186	\$2,356,046
Openhouse	\$739,120	\$2,956,480	\$295,648	\$3,252,128
Russian American Community Services	\$111,109	\$444,436	\$44,444	\$488,880
Self Help for the Elderly Jackie Chan Senior Center - 5757 Geary	\$114,498	\$457,992	\$45,799	\$503,791
Self Help for The Elderly Geen Mun Senior Center - 777 Stockton	\$118,661	\$474,644	\$47,464	\$522,108
Self Help for The Elderly Lady Shaw Senior Center - 1483 Mason	\$82,560	\$330,240	\$33,024	\$363,264



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Agency	Annual Grant Amount	Total Grant Amount 7/1/23-6/30/27	10% Contingency	Not to Exceed
Self Help for The Elderly Manilatown Senior Center - 848 Kearney	\$93,037	\$372,148	\$37,215	\$409,363
Self Help for The Elderly South Sunset Senior Center - 2601 40th Ave	\$98,891	\$395,564	\$39,556	\$435,120
Self Help for The Elderly Mendelsohn House Senior Center - 737 Folsom	\$102,474	\$409,896	\$40,990	\$450,886
Self Help for The Elderly Woolf House Senior Center - 801 Howard	\$100,499	\$401,996	\$40,200	\$442,196
Self Help for The Elderly West Portal Senior Center - 131 Lenox Way	\$99,790	\$399,160	\$39,916	\$439,076
Self Help for The Elderly John King Senior Center - 500 Raymond	\$99,984	\$399,936	\$39,994	\$439,930
Self Help for The Elderly Geneva Senior Center - 5050 Mission	\$122,673	\$490,692	\$49,069	\$539,761
Sequoia Living Aquatic Park - 890 Beach	\$528,861	\$2,115,444	\$211,544	\$2,326,988
Sequoia Living Downtown - 481 O'Farrell	\$271,669	\$1,086,676	\$108,668	\$1,195,344
Southwest Community Corp (It Bookman)	\$301,474	\$1,205,896	\$120,590	\$1,326,486
YMCA of San Francisco Bayview Hunters Point	\$150,000	\$600,000	\$60,000	\$660,000
YMCA of San Francisco Buchanan	\$133,000	\$532,000	\$53,200	\$585,200
YMCA of San Francisco Chinatown	\$105,996	\$423,984	\$42,398	\$466,382
YMCA of San Francisco Mission	\$108,510	\$434,040	\$43,404	\$477,444
YMCA of San Francisco Parkmerced	\$110,495	\$441,980	\$44,198	\$486,178
YMCA of San Francisco Richmond	\$145,212	\$580,848	\$58,085	\$638,933
YMCA of San Francisco Stonestown	\$318,586	\$1,274,344	\$127,434	\$1,401,778
Totals	\$11,988,580	\$47,954,320	\$4,795,432	\$52,749,752



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Background

DAS-funded Community Service programs can be most easily identified as the network of community centers located throughout the city and county of San Francisco. These community centers are home to the rich history of San Francisco and have been built and nurtured over the years with direct input, insight, and support from the people and neighborhoods they serve.

These community centers are more than just a meeting place for older adults and adults with disabilities. Program and activity offerings at DAS-funded community centers are designed to engage with the community around them while enhancing the cultural, educational, mental, and physical well-being of participants. These are also the entry point for many older adults and adults with disabilities in need of information and support services, thus translation and social services are made available on-site. Additional DAS-funded services, including nutrition, health promotion, and digital literacy programs are often co-located at these centers.

The coronavirus pandemic has shown the importance of bridging the digital divide. In recognition of this need, a limited amount of funding was added to the Community Services program for organizations to apply for and increase their capacity to include Digital Navigation. The selection of the following grantees was also done through the Request for Proposal #1060 and in this term, Curry Senior Center, Mission Neighborhood Centers, Kimochi Inc., Bernal Heights Neighborhood Center – Cortland, and Bernal Heights Neighborhood Center – Excelsior were awarded to include this service component.

Digital Navigation funding, through the Community Services program, will expand the technology support of the department, which includes the SF Connected program. Organizations that don't have Digital Navigation funding can and will continue to receive digital literacy training and support for their consumers at their centers from SF Connected providers.

Services to be Provided

Grantees will operate a community center space designed to engage with the surrounding community which will be welcoming and accessible for older adults and adults with disabilities. Each grantee will offer a variety of activities and services designed to maintain or improve the quality of life of program participants. Activities and services shall consider participants' physical, social, psychological, economic, educational,



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recreational, and/or creative needs. While the community center may serve as a hub for operations, services may take place in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

For reporting purposes, the delivery of DAS-funded Community Services is categorized into four groups as applicable:

Activity Scheduling – educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that helps participants maintain or enhance their level of functioning.

Translation – translation assistance provided to consumers that cannot speak/read English. Services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

Social Services – providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.

Curry Senior Center, Mission Neighborhood Centers, Kimochi Inc, Bernal Heights Neighborhood Center – Cortland, Bernal Heights Neighborhood Center – Excelsior will include the following service component in their program.

Digital Navigation – The digital navigator shall provide one-on-one or small-group technology support to consumers and be the main point of contact for technology-related questions and concerns at the center. Examples of duties shall include but are not limited to, assisting consumers with subscribing to low-cost internet options for their home, in-person and online troubleshooting of personal devices, research and sourcing of



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additional tech equipment as needed by the consumer, and collaborating with DAS and other digital inclusion service providers for coordination and exchange of information.

The impact of program services is measured primarily through the administration of client surveys. Surveys seek feedback on whether services offered met the needs of clients, if services improved physical health, and if services created opportunities for socialization and interaction with others. Results from these surveys are shared with contractors and are used to inform program design and types of services offered.

Selection

Grantees were selected through Request for Proposals (RFP) #1060, which was issued in March of 2023.

Funding

Funding for these grants is provided through County General funds.

ATTACHMENTS

– **DAS Community Services Program Site Map FY23-27**

– **Bayanihan Equity Center**

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

– **Bayview Senior Services (BHPMSS)**

Dr. Davis Senior Center

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Rosa Parks Senior Center

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart



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Western Addition Senior Center
Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

– **Bernal Heights Neighborhood Center**

Cortland
Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

Excelsior
Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

– **Booker T. Washington Community Service Center**

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

– **Catholic Charities of San Francisco**

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

– **Centro Latino de San Francisco, Inc.**

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

– **Curry Senior Center**

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

– **Episcopal Community Services**

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart



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- **Felton Institute**
 - Appendix A – Services to be provided
 - Appendix B – Budget
 - Appendix F – Site Chart

- **Golden Gate Senior Services**
 - Castro Senior Center
 - Appendix A – Services to be provided
 - Appendix B – Budget
 - Appendix F – Site Chart
 - Richmond Senior Center
 - Appendix A – Services to be provided
 - Appendix B – Budget
 - Appendix F – Site Chart

- **Independent Living Resource Center of San Francisco**
 - Appendix A – Services to be provided
 - Appendix B – Budget
 - Appendix F – Site Chart

- **Kimochi, Inc.**
 - Appendix A – Services to be provided
 - Appendix B – Budget
 - Appendix F – Site Chart

- **Lighthouse for the Blind and Visually Impaired**
 - Appendix A – Services to be provided
 - Appendix B – Budget
 - Appendix F – Site Chart

- **Mission Neighborhood Centers**
 - Appendix A – Services to be provided
 - Appendix B – Budget
 - Appendix F – Site Chart

- **On Lok Day Services / 30th Street Senior Center**
 - Appendix A – Services to be provided
 - Appendix B – Budget



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Appendix F – Site Chart

– **Openhouse**

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

– **Russian American Community Services**

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

– **Self-Help for the Elderly**

Jackie Chan Senior Center - 5757 Geary

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Geen Mun Senior Center - 777 Stockton

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Lady Shaw Senior Center - 1483 Mason

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Manilatown Senior Center - 848 Kearney

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

South Sunset Senior Center - 2601 40th Ave

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart



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Mendelsohn House Senior Center - 737 Folsom

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

Woolf House Senior Center - 801 Howard

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

West Portal Senior Center - 131 Lenox Way

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

John King Senior Center - 500 Raymond

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

Geneva Senior Center - 5050 Mission

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

– Sequoia Living

Aquatic Park Senior Center

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

Downtown Senior Center

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart

– Southwest Community Corporation

Appendix A – Services to be provided
Appendix B – Budget
Appendix F – Site Chart



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– **YMCA of San Francisco**

Bayview Hunters Point

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Buchanan

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Chinatown

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Mission

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Parkmerced

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Richmond

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart

Stonestown

Appendix A – Services to be provided

Appendix B – Budget

Appendix F – Site Chart









































SAN FRANCISCO HUMAN SERVICES AGENCY
**Department of Disability
 and Aging Services**

Community Services Program Site Map



District	Agency Name	Center Name	Address
1 	Golden Gate Senior Services	Richmond Senior Center	6221 Geary Blvd 3 rd Fl, 94121
1 	Self-Help for the Elderly	Jackie Chan Senior Center	5757 Geary Blvd, 94121
1 	YMCA of San Francisco	Richmond District YMCA	360 18th Ave, 94121

 2	Sequoia Living	Aquatic Park Senior Center	890 Beach St, 94109
 2	Russian American Community Services	Russian American Community Services	300 Anza St, 94118
 3	YMCA of San Francisco	Chinatown YMCA	855 Sacramento St, 94108
 3	Self-Help for the Elderly	Geen Mun Senior Center	777 Stockton St, 94108
 3	Self-Help for the Elderly	Lady Shaw Senior Center	1483 Mason St, 94133
 3	Self-Help for the Elderly	Manilatown Senior Center	848 Kearny St, 94108
 4	Self-Help for the Elderly	South Sunset Senior Center	2601 40th Ave, 94116
 4	YMCA of San Francisco	Stonestown Family YMCA	333 Eucalyptus Dr, 94132
 5	Booker T. Washington Community Service Center	Booker T. Washington Community Service Center	800 Presidio Ave, 94115
 5	Curry Senior Center	Curry Senior Center	333 Turk St, 94102
 5	Bayview Senior Services	Rosa Parks Senior Center	1111 Buchanan St, 94115
 5	Bayview Senior Services	Western Addition Senior Center	1390 1/2 Turk St, 94115
 5	YMCA of San Francisco	Buchanan YMCA	1530 Buchanan St, 94115
 5	Sequoia Living	Downtown Senior Center	481 O'Farrell St, 94102
 5	Kimochi, Inc.	Kimochi Senior Center	1840 Sutter St Ste 101, 94115
 6	Episcopal Community Services	Canon Kip Senior Center	165 8th St, 94103
 6	LightHouse for the Blind and Visually Impaired	Lighthouse for the Blind and Visually Impaired	1155 Market St 10th Fl, 94103
 6	Self-Help for the Elderly	Mendelsohn House Senior Center	737 Folsom St, 94107
 6	Self-Help for the Elderly	Wolf House Senior Center	801 Howard St, 94103
 6	Bayanihan Equity Center	Bayanihan Equity Center	1010 Mission St Ste C, 94103

6 	Independent Living Resource Center of SF	Independent Living Resource Center of SF	825 Howard St, 94103
7 	YMCA of San Francisco	Stonestown Family YMCA - Parkmerced	3711 19th Ave, 94132
7 	Self-Help for the Elderly	West Portal Clubhouse	131 Lenox Way, 94127
8 	Openhouse	Bob Ross LGBT Senior Center	65 Laguna St, 94102
8 	On Lok Day Services	30th Street Senior Service	225 30th St, 94110
8 	Golden Gate Senior Services	Castro Senior Center	110 Diamond St, 94114
8 	YMCA of San Francisco	Mission YMCA	4080 Mission St, 94112
9 	Mission Neighborhood Centers	Mission Neighborhood Centers	362 Capp St, 94110
9 	Centro Latino de San Francisco	Centro Latino de San Francisco	1656 15th St, 94103
9 	Bernal Heights Neighborhood Center	Bernal Heights Neighborhood Center	515 Cortland Ave, 94110
10 	Bayview Senior Services	Dr. George W. Davis Senior Center	1753 Carroll Ave, 94124
10 	Self-Help for the Elderly	John King Community Center	500 Raymond Ave, 94134
10 	YMCA of San Francisco	Bayview Hunters Point YMCA	1601 Lane St, 94124
10 	Felton Institute	Visitacion Valley Family Center	66 Raymond Ave, 94134
11 	Catholic Charities	OMI Senior Center	65 Beverly St, 94132
11 	Bernal Heights Neighborhood Center	Excelsior Community Center	4468 Mission St, 94112
11 	Self-Help for the Elderly	Geneva Community Center	5050 Mission St Ste C, 94112
11 	Southwest Community Corporation	I.T. Bookman Community Center	446 Randolph St, 94132

Appendix A - Services to be Provided
BAYANIHAN EQUITY CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	BAYANIHAN EQUITY CENTER
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	600	600	600	600
Activity Scheduling	4,000	4,000	4,000	4,000
Translation Services	2,000	2,000	2,000	2,000
Social Services	3,500	3,500	3,500	3,500
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Noah Gallo

Program Analyst

DAS, Office of Community Partnership

Noah.Gallo1@SFGov.org

Patrick Garcia

Contract Manager

HSA, Office of Contract Management

Patrick.Garcia@SFGov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written

policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Bayanihan Equity Center					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$429,608	\$429,608	\$429,608	\$429,608	\$1,718,432
Operating Expenses	\$69,993	\$69,993	\$69,993	\$69,993	\$279,972
Subtotal	\$499,601	\$499,601	\$499,601	\$499,601	\$1,998,404
Indirect Percentage (%)					
Indirect Cost					
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$499,601	\$499,601	\$499,601	\$499,601	\$1,998,404
DAS Revenues					
General Funds	\$499,601	\$499,601	\$499,601	\$499,601	\$1,998,404
Total DAS Revenue	\$499,601	\$499,601	\$499,601	\$499,601	\$1,998,404
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$499,601	\$499,601	\$499,601	\$499,601	\$1,998,404
Full Time Equivalent (FTE)	6.55	6.55	6.55	6.55	26.19
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

DAS Salaries & Benefits	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	(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	Budgeted Salary
Executive Director	\$88,275	0.66	100%	0.66	\$58,275	\$58,275	\$58,275	\$58,275	\$233,100
Community Service Worker (2)	\$45,000	2.00	100%	2.00	\$90,000	\$90,000	\$90,000	\$90,000	\$360,000
Activities Coordinator	\$47,000	1.00	100%	1.00	\$47,000	\$47,000	\$47,000	\$47,000	\$188,000
Data Systems Specialist	\$52,000	1.00	100%	1.00	\$52,000	\$52,000	\$52,000	\$52,000	\$208,000
Operations Manager & Data Collection Specialist	\$62,000	0.89	100%	0.89	\$55,000	\$55,000	\$55,000	\$55,000	\$220,000
Housing Caseworker	\$47,000	1.00	100%	1.00	\$47,000	\$47,000	\$47,000	\$47,000	\$188,000
Totals	\$341,275	6.55	600%	6.55	\$349,275	\$349,275	\$349,275	\$349,275	\$1,397,100
Fringe Benefits Rate	23%								
Employee Fringe Benefits	\$78,493				\$80,333	\$80,333	\$80,333	\$80,333	\$321,332
Total DAS Salaries and Benefits	\$419,768				\$429,608	\$429,608	\$429,608	\$429,608	\$1,718,432

HSA #2

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property	\$13,021	\$13,021	\$13,021	\$13,021	\$52,084
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$7,600	\$7,600	\$7,600	\$7,600	\$30,400
Office Supplies, Postage	\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
Building Maintenance Supplies and Repair					
Printing and Reproduction	\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Insurance	\$8,200	\$8,200	\$8,200	\$8,200	\$32,800
Staff Training					
Staff Travel	\$3,360	\$3,360	\$3,360	\$3,360	\$13,440
Rental of Equipment	\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
Consultants					
Other					
Bookkeeping	\$6,000	\$6,000	\$6,000	\$6,000	\$24,000
Audit	\$11,000	\$11,000	\$11,000	\$11,000	\$44,000
Payroll Processing	\$3,400	\$3,400	\$3,400	\$3,400	\$13,600
Senior Activities	\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
Subscriptions	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Stipends	\$6,912	\$6,912	\$6,912	\$6,912	\$27,648
Total DAS Operating Expenses	\$69,993	\$69,993	\$69,993	\$69,993	\$279,972

HSA #3

APPENDIX F - SITE CHART

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

AGENCY: BAYANIHAN EQUITY CENTER

FISCAL YEAR: 23/24 – 26/27

CONTRACT: COMMUNITY SERVICES

DIRECTOR: LUISA M. ANTONIO

PHONE NO.: 415-255-2347

SITES:	BAYANIHAN EQUITY CENTER				
Name of Site	BAYANIHAN EQUITY CENTER				
Address and Zip	1010 Mission Street Suite C San Francisco, CA 94103				
Phone Number	415-255-2347				
Fax Number	415-255-2358				
Neighborhood	South of Market				
Muni Line #s	14 Mission and 14 R				
Person in Charge & Site Manager	Luisa M. Antonio				
Programs Offered at Site	Case Work, Recreational Activities, Translation & Interpretation, Food Access (IFA & SGP), Informational Workshops, and Housing Assistance				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun BEC staff works remotely and Fridays. Services offered are by and Zoom.	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	BEC is open from 9:00am - 12:00pm and 1:00pm to 5:00pm, Monday to Thursday. BEC staff remotely operates the same hours on Fridays.				
Hours of <u>scheduled</u> programming	9:00am - 12:00pm and 1:00pm to 5:00pm				
Total number of service days in FY					
Days closed	BEC is closed on weekends, Federal Holidays, Christmas & New Year's Eve				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided

BAYVIEW HUNTERS PT. MULTIPURPOSE SENIOR SERVICES - DR. GEORGE W. DAVIS SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	BAYVIEW HUNTERS PT MULTIPURPOSE SR SVC (Dr Davis - 1751 Carroll)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	930	930	930	930
Activity Scheduling	5,040	5,040	5,040	5,040
Translation Services	600	600	600	600
Social Services	1,680	1,680	1,680	1,680
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Sarah Chan
Program Analyst
DAS OCP
sarah.chan@sfgov.org

and

Steve Kim
Contract Manager
HSA OCM
steve.kim@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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		Term			
6	Bayview Senior Services		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Services - Dr. Davis					
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	Total
12	Expenditures					
13	Salaries & Benefits	\$797,815	\$797,815	\$797,815	\$797,815	\$3,191,260
14	Operating Expenses	\$252,366	\$252,366	\$252,366	\$252,366	\$1,009,464
15	Subtotal	\$1,050,181	\$1,050,181	\$1,050,181	\$1,050,181	\$4,200,724
16	Indirect Percentage (%)	12%	12%	12%	12%	15%
17	Indirect Cost (Line 16 X Line 15)	\$126,022	\$126,022	\$126,022	\$126,022	\$504,088
18	Subcontractor/Capital Expenditures					
19	Total Expenditures	\$1,176,203	\$1,176,203	\$1,176,203	\$1,176,203	\$4,704,812
20	HSA Revenues					
21	General Funds	\$1,176,203	\$1,176,203	\$1,176,203	\$1,176,203	\$4,704,812
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$1,176,203	\$1,176,203	\$1,176,203	\$1,176,203	\$4,704,812
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$1,176,203	\$1,176,203	\$1,176,203	\$1,176,203	\$4,704,812
37	Full Time Equivalent (FTE)					
39	Prepared by:		Telephone No.:			
40	HSA-CO Review Signature: _____					
41	HSA #1					

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	Bayview Senior Services												
4	Program: Community Services - Dr. Davis												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	Expenditure Category		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 7/1/23 - 6/30/27
13	Rental of Property			\$750	\$750	\$750	\$750						\$3,000
14													
15													
16	Utilities(Elec, Water, Gas, Phone, Garbage)			\$56,973	\$56,973	\$56,973	\$56,973						\$227,892
17	Office Supplies, Postage			\$10,040	\$10,040	\$10,040	\$10,040						\$40,160
18	Building Maintenance Supplies and Repair			\$24,000	\$24,000	\$24,000	\$24,000						\$96,000
19	Printing and Reproduction			\$3,900	\$3,900	\$3,900	\$3,900						\$15,600
20	Insurance			\$14,635	\$14,635	\$14,635	\$14,635						\$58,540
21	Staff Training			\$1,200	\$1,200	\$1,200	\$1,200						\$4,800
22	Staff Travel-(Local & Out of Town)			\$1,200	\$1,200	\$1,200	\$1,200						\$4,800
23	Rental of Equipment			\$3,900	\$3,900	\$3,900	\$3,900						\$15,600
24													
25	CONSULTANTS												
26	Wellness Classes Contractor			\$56,000	\$56,000	\$56,000	\$56,000						\$224,000
27	Computer/Network Support			\$4,800	\$4,800	\$4,800	\$4,800						\$19,200
28	Samoan Community			\$60,568	\$60,568	\$60,568	\$60,568						\$242,272
29	OTHER												
30	Program Supplies			\$14,400	\$14,400	\$14,400	\$14,400						\$57,600
31													
32													
33	TOTAL OPERATING EXPENSE			<u>\$252,366</u>	<u>\$252,366</u>	<u>\$252,366</u>	<u>\$252,366</u>						<u>\$1,009,464</u>
34													
35	HSA #3												

APPENDIX F - SITE CHART FY23/24 – 26/27

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Bayview Hunters Point Multipurpose Senior Service
 FISCAL YEAR: 23/24

CONTRACT MAILING ADDRESS: 1753 Carroll, San Francisco CA 94124

DIRECTOR: Cathy Davis

PHONE NO.: 415-822-1444

<u>SITES:</u> (Community Services)					
Name of Site	Dr George Davis Senior Center	Western Addition Senior Center	Rosa Parks Senior Center		
Address and Zip	1753 Carroll, SF 94124	1390 ½ Turk, SF 94115	1111 Buchanan		
Phone Number	415-822-1444	415-921-7805	415-292-3474		
Fax Number					
Neighborhood	Bayview Hunters Point	Western Addition	Western Addition		
Muni Line #s	T-Line, 54	22, 5	19,5		
Person in Charge	James Evans	Robin Bill	Skye Davis		
Site Manager					
Programs Offered at Site	Case Mgt., ADRC, Money Mgt, Nutrition, Senior Ctr Activities, Intergen Prog	Case Mgt., ADRC, Nutrition, Senior Ctr Activities	Nutrition, Senior Ctr Activities		
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9-5 Tues. ,5PM -8 Th 5PM-9	9-5	9-5		
Hours of <u>scheduled</u> programming	9-5 Tues. ,5PM -8 Th 5PM-9	9-4	9-4		
Total number of service days in FY	301 301	361 361	259		
Days closed	NYr,MLK,Pres,Mem,Jun ethJuly4,Labor,Vet, Tks-2, Xmas	5 th Wed of the month .	NYr,MLK,Pres,Mem,Jun ethJuly4,Labor,Vet, Tks-2, Xmas		
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

BAYVIEW HUNTERS PT MULTIPURPOSE SENIOR SERVICES – ROSA PARKS SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	BAYVIEW HUNTERS PT MULTIPURPOSE SR SVC (Rosa Parks - 1111 Buchanan)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	300	300	300	300
Activity Scheduling	1,680	1,680	1,680	1,680
Translation Services	150	150	150	150
Social Services	900	900	900	900
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Sarah Chan
Program Analyst
DAS OCP
sarah.chan@sfgov.org

and

Steve Kim
Contract Manager
HSA OCM
steve.kim@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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		Term			
6	Bayview Senior Services		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Services - Rosa Parks					
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	Total
12	Expenditures					
13	Salaries & Benefits	\$300,013	\$300,013	\$300,013	\$300,013	\$1,200,054
14	Operating Expenses	\$34,609	\$34,609	\$34,609	\$34,609	\$138,436
15	Subtotal	\$334,622	\$334,622	\$334,622	\$334,622	\$1,338,490
16	Indirect Percentage (%)	11%	11%	11%	11%	12%
17	Indirect Cost (Line 16 X Line 15)	\$36,808	\$36,808	\$36,808	\$36,808	\$110,424
18	Subcontractor/Capital Expenditures					
19	Total Expenditures	\$371,431	\$371,431	\$371,431	\$371,431	\$1,485,724
20	HSA Revenues					
21	General Funds	\$371,431	\$371,431	\$371,431	\$371,431	\$1,485,724
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$371,431	\$371,431	\$371,431	\$371,431	\$1,485,724
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$371,431	\$371,431	\$371,431	\$371,431	\$1,485,724
37	Full Time Equivalent (FTE)					
39	Prepared by:		Telephone No.:			
40	HSA-CO Review Signature: _____					
41	HSA #1					

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	Bayview Senior Services												
4	Program: Community Services - Rosa Parks												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	Expenditure Category	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	
13	Rental of Property												<u>7/1/23 - 6/30/27</u>
14	Utilities(Elec, Water, Gas, Phone, Garbage)		\$16,604	\$16,604	\$16,604	\$16,604	\$16,604	\$16,604	\$16,604	\$16,604	\$16,604	\$	66,416
15	Office Supplies, Postage		\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$	7,200
16	Building Maintenance Supplies and Repair		\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$1,800	\$	7,200
17	Printing and Reproduction												
18	Insurance		\$5,805	\$5,805	\$5,805	\$5,805	\$5,805	\$5,805	\$5,805	\$5,805	\$5,805	\$	23,220
19	Staff Training												
20	Staff Travel-(Local & Out of Town)												
21	Rental of Equipment		\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$	20,000
22													
23	CONSULTANTS												
24													
25													
26													
27	OTHER												
28	Program Support		\$2,400	\$2,400	\$2,400	\$2,400	\$2,400	\$2,400	\$2,400	\$2,400	\$2,400	\$	9,600
29	Technical Support		\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$	4,800
30													
31	TOTAL OPERATING EXPENSE		\$ 34,609	\$ 34,609	\$ 34,609	\$ 34,609	\$ 34,609	\$ 34,609	\$ 34,609	\$ 34,609	\$ 34,609	\$	138,436
32													
33	HSA #3												

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Bayview Hunters Point Multipurpose Senior Service
 FISCAL YEAR: 23/24 – 26/27

CONTRACT MAILING ADDRESS: 1753 Carroll, San Francisco CA 94124

DIRECTOR: Cathy Davis

PHONE NO.: 415-822-1444

<u>SITES:</u> (Community Services)					
Name of Site	Dr George Davis Senior Center	Western Addition Senior Center	Rosa Parks Senior Center		
Address and Zip	1753 Carroll, SF 94124	1390 ½ Turk, SF 94115	1111 Buchanan		
Phone Number	415-822-1444	415-921-7805	415-292-3474		
Fax Number					
Neighborhood	Bayview Hunters Point	Western Addition	Western Addition		
Muni Line #s	T-Line, 54	22, 5	19,5		
Person in Charge	James Evans	Robin Bill	Skye Davis		
Site Manager					
Programs Offered at Site	Case Mgt., ADRC, Money Mgt, Nutrition, Senior Ctr Activities, Intergen Prog	Case Mgt., ADRC, Nutrition, Senior Ctr Activities	Nutrition, Senior Ctr Activities		
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9-5 Tues. ,5PM -8 Th 5PM-9	9-5	9-5		
Hours of <u>scheduled</u> programming	9-5 Tues. ,5PM -8 Th 5PM-9	9-4	9-4		
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Days closed	NYr,MLK,Pres,Mem,Jun ethJuly4,Labor,Vet, Tks-2, Xmas	5 th Wed of the month	NYr,MLK,Pres,Mem,Jun ethJuly4,Labor,Vet, Tks-2, Xmas		
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

BAYVIEW HUNTERS PT. MULTIPURPOSE SENIOR SERVICES – WESTERN ADDITION SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	BAYVIEW HUNTERS PT MULTIPURPOSE SR SVC (Western Addition - 1390 1/2 Turk)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	548	548	548	548
Activity Scheduling	1,800	1,800	1,800	1,800
Translation Services	150	150	150	150
Social Services	1,040	1,040	1,040	1,040
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Sarah Chan
Program Analyst
DAS OCP
sarah.chan@sfgov.org

and

Steve Kim
Contract Manager
HSA OCM
steve.kim@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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		Term			
6	Bayview Senior Services		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Services - Western Addition					
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	Total
12	Expenditures					
13	Salaries & Benefits	\$286,301	\$286,301	\$286,301	\$286,301	\$1,145,204
14	Operating Expenses	\$47,333	\$47,333	\$47,333	\$47,333	\$189,332
15	Subtotal	\$333,634	\$333,634	\$333,634	\$333,634	\$1,334,536
16	Indirect Percentage (%)	11%	11%	11%	11%	12%
17	Indirect Cost (Line 16 X Line 15)	\$36,700	\$36,700	\$36,700	\$36,700	\$146,800
18	Subcontractor/Capital Expenditures					
19	Total Expenditures	\$370,334	\$370,334	\$370,334	\$370,334	\$1,481,336
20	HSA Revenues					
21	General Funds	\$370,334	\$370,334	\$370,334	\$370,334	\$1,481,336
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$370,334	\$370,334	\$370,334	\$370,334	\$1,481,336
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$370,334	\$370,334	\$370,334	\$370,334	\$1,481,336
37	Full Time Equivalent (FTE)					
39	Prepared by:		Telephone No.:			
40	HSA-CO Review Signature:		_____			
41	HSA #1					

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	Bayview Senior Services												
4	Program: Community Services - Western Addition												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	Expenditure Category	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		\$7,416	\$7,416	\$7,416	\$7,416						\$29,664	
14	Utilities(Elec, Water, Gas, Phone, Garbage)		\$17,240	\$17,240	\$17,240	\$17,240						\$68,960	
15	Office Supplies, Postage		\$3,600	\$3,600	\$3,600	\$3,600						\$14,400	
16	Building Maintenance Supplies and Repair		\$3,600	\$3,600	\$3,600	\$3,600						\$14,400	
17	Printing and Reproduction												
18	Insurance		\$5,677	\$5,677	\$5,677	\$5,677						\$22,708	
19	Staff Training												
20	Staff Travel-(Local & Out of Town)												
21	Rental of Equipment		\$5,000	\$5,000	\$5,000	\$5,000						\$20,000	
22													
23	CONSULTANTS												
24													
25													
26													
27	OTHER												
28	Program Support		\$3,600	\$3,600	\$3,600	\$3,600						\$14,400	
29	Technical Support		\$1,200	\$1,200	\$1,200	\$1,200						\$4,800	
30													
31	TOTAL OPERATING EXPENSE		\$47,333	\$47,333	\$47,333	\$47,333						\$189,332	
32													
33	HSA #3												1/0/1900

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Bayview Hunters Point Multipurpose Senior Service
 FISCAL YEAR: 23/24 – 26/27

CONTRACT MAILING ADDRESS: 1753 Carroll, San Francisco CA 94124

DIRECTOR: Cathy Davis

PHONE NO.: 415-822-1444

<u>SITES:</u> (Community Services)					
Name of Site	Dr George Davis Senior Center	Western Addition Senior Center	Rosa Parks Senior Center		
Address and Zip	1753 Carroll, SF 94124	1390 ½ Turk, SF 94115	1111 Buchanan		
Phone Number	415-822-1444	415-921-7805	415-292-3474		
Fax Number					
Neighborhood	Bayview Hunters Point	Western Addition	Western Addition		
Muni Line #s	T-Line, 54	22, 5	19,5		
Person in Charge	James Evans	Robin Bill	Skye Davis		
Site Manager					
Programs Offered at Site	Case Mgt., ADRC, Money Mgt, Nutrition, Senior Ctr Activities, Intergen Prog	Case Mgt., ADRC, Nutrition, Senior Ctr Activities	Nutrition, Senior Ctr Activities		
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9-5 Tues. ,5PM -8 Th 5PM-9	9-5	9-5		
Hours of <u>scheduled</u> programming	9-5 Tues. ,5PM -8 Th 5PM-9	9-4	9-4		
Total number of service days in FY	301 301	361 361	259		
Days closed	NYr,MLK,Pres,Mem,Jun ethJuly4,Labor,Vet, Tks-2, Xmas	5 th Wed of the month .	NYr,MLK,Pres,Mem,Jun ethJuly4,Labor,Vet, Tks-2, Xmas		
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
BERNAL HEIGHTS NEIGHBORHOOD CENTER – CORTLAND CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	BERNAL HEIGHTS NEIGHBORHOOD CENTER (Cortland)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
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Socially Isolated	Having few social relationships and few people to interact with regularly.
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Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
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V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

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workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
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 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
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 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Grantee will provide digital navigators who will be responsible for digital literacy training, tech support of personal devices, and navigation of other digital inclusion resources needed by consumers. This position shall provide one-on-one or small-group technology support to consumers and be the main point of contact for questions and concerns relating to technology at the center. Examples of duties shall include but are not limited to, assisting consumers with subscribing to low-cost internet options for their home, in-person and online troubleshooting of personal devices, research and sourcing of additional tech equipment as needed by the consumer, and collaborating with DAS and other digital inclusion service providers for coordination and exchange of information.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	425	425	425	425
Activity Scheduling	2800	2800	2800	2800
Translation Services	200	200	200	200
Social Services	3000	3000	3000	3000
Digital Navigation*	500	500	500	500
1 unit of service = 1 hour of service provision				

*1 unit of Digital Navigation = 1 hour of one-on-one or small group sessions conducted virtually or in-person at a Community Services program site, provided by staff or trained volunteers.

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

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3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
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6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
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9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
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12. 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.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Steve Kim
Contract Manager
HSA OCM
steve.kim@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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		Term			
6	Bernal Heights Neighborhood Center		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Service -Cortland					
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	Total
12	Expenditures					
13	Salaries & Benefits	\$247,173	\$247,173	\$247,173	\$247,173	\$988,693
14	Operating Expenses	\$28,500	\$28,500	\$28,500	\$28,500	\$114,000
15	Subtotal	\$275,673	\$275,673	\$275,673	\$275,673	\$1,102,693
16	Indirect Percentage (%)	11%	11%	11%	11%	11%
17	Indirect Cost (Line 16 X Line 15)	\$32,715	\$32,715	\$32,715	\$32,715	\$130,859
18	Subcontractor/Capital Expenditures					
19	Total Expenditures	\$308,388	\$308,388	\$308,388	\$308,388	\$1,233,552
20	HSA Revenues					
21	General Funds	\$308,388	\$308,388	\$308,388	\$308,388	\$1,233,552
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$308,388	\$308,388	\$308,388	\$308,388	\$1,233,552
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$308,388	\$308,388	\$308,388	\$308,388	\$1,233,552
37	Full Time Equivalent (FTE)					
39	Prepared by:		Telephone No.:			
40	HSA-CO Review Signature:		_____			
41	HSA #1					

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3	Bernal Heights Neighborhood Center												
4	Program: Community Service -Cortland												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													TOTAL
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>		<u>7/1/23 - 6/30/27</u>
13	Rental of Property												\$ -
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$3,000		\$3,000		\$3,000		\$3,000		\$ 12,000
15	Office Supplies, Postage				\$2,000		\$2,000		\$2,000		\$2,000		\$ 8,000
16	Building Maintenance Supplies and Repair				\$8,000		\$8,000		\$8,000		\$8,000		\$ 32,000
17	Printing and Reproduction				\$500		\$500		\$500		\$500		\$ 2,000
18	Insurance				\$4,000		\$4,000		\$4,000		\$4,000		\$ 16,000
19	Staff Training				\$1,500		\$1,500		\$1,500		\$1,500		\$ 6,000
20	Staff Travel-(Local & Out of Town)				\$2,500		\$2,500		\$2,500		\$2,500		\$ 10,000
21	Rental of Equipment				\$500		\$500		\$500		\$500		\$ 2,000
22													
23	CONSULTANTS												
24													
25													
26													
27	OTHER												
28	Program Expense				\$6,500		\$6,500		\$6,500		\$6,500		\$ 26,000
29													
30													
31	TOTAL OPERATING EXPENSE				\$ 28,500		\$ 28,500		\$ 28,500		\$ 28,500		\$ 114,000
32													
33	HSA #3												

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIP

AGENCY: Bernal Heights Neighborhood Center**FY23/24 – 26/27**

CONTRACT MAILING ADDRESS: 515 Cortland Avenue San Francisco CA 94110

DIRECTOR: Gina Dacus (Executive Director)

PHONE NO.: (415) 206-2140

SITES: (Community Services) Name of Site	Bernal Heights Neighborhood Center	Excelsior Community Center
Address and Zip	515 Cortland Avenue San Francisco CA 94110	4468 Mission Street San Francisco CA 94112
Phone Number	415-206-2140	415-206-2140
Fax Number	415-648-0793	415-334-9918
Neighborhood	Bernal Heights	Mission and Excelsior
Muni Line #s	24, 67, 14, 49	14,49,29
Person in Charge	Sophia Wong	Gina Dacus
Site Manager	Sophia Wong	Gina Dacus
Programs Offered at Site	(Community Services, Congregate Meal)	(Community Services, Congregate Meal)
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00 AM – 5:00 PM	9:00 AM – 5:00 PM <i>Saturday 9:00 AM- 3:00 PM</i>
Hours of <u>scheduled</u> programming	9:00 AM – 3:00 PM	9:00 AM – 3:00 PM
Hours of meal service	4.00	4.00
Annual number of meals at site	6,100	11,720
Average number of meals per day	25	40
Total number of service days in FY	244	293
Days closed	July 4 Independence Day Sept. 2 Labor Day Nov. 28 Thanksgiving Day Nov.29 Day After Thanksgiving Dec.18 –Dec.31 In Observance of December Holidays Jan.1- Jan. 3 In Observance of December Holidays Jan. 20 Martin Luther King Jr. Day Feb.17 Presidents Day Mar.31 Cesar Chavez Day May 25 Memorial Day	July 4 Independence Day Sept. 2 Labor Day Nov. 28 Thanksgiving Day Nov.29 Day After Thanksgiving Dec.18 –Dec.31 In Observance of December Holidays Jan.1- Jan. 4 In Observance of December Holidays Jan. 20 Martin Luther King Jr. Day Feb.17 Presidents Day Mar.31 Cesar Chavez Day May 25 Memorial Day
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
BERNAL HEIGHTS NEIGHBORHOOD CENTER – EXCELSIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	BERNAL HEIGHTS NEIGHBORHOOD CENTER (Excelsior)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Grantee will provide digital navigators who will be responsible for digital literacy training, tech support of personal devices, and navigation of other digital inclusion resources needed by consumers. This position shall provide one-on-one or small-group technology support to consumers and be the main point of contact for questions and concerns relating to technology at the center. Examples of duties shall include but are not limited to, assisting consumers with subscribing to low-cost internet options for their home, in-person and online troubleshooting of personal devices, research and sourcing of additional tech equipment as needed by the consumer, and collaborating with DAS and other digital inclusion service providers for coordination and exchange of information.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	425	425	425	425
Activity Scheduling	2,800	2,800	2,800	2,800
Translation Services	1,000	1,000	1,000	1,000
Social Services	3,000	3,000	3,000	3,000
Digital Navigation*	500	500	500	500
1 unit of service = 1 hour of service provision				

*1 unit of Digital Navigation = 1 hour of one-on-one or small group sessions conducted virtually or in-person at a Community Services program site, provided by staff or trained volunteers.

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Steve Kim
Contract Manager
HSA OCM
steve.kim@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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		Term			
6	Bernal Heights Neighborhood Center		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Services - Excelsior					
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	Total
12	Expenditures					
13	Salaries & Benefits	\$259,200	\$259,200	\$259,200	\$259,200	\$1,036,800
14	Operating Expenses	\$76,802	\$76,802	\$76,802	\$76,802	\$307,209
15	Subtotal	\$336,002	\$336,002	\$336,002	\$336,002	\$1,344,009
16	Indirect Percentage (%)	13%	13%	13%	13%	13%
17	Indirect Cost (Line 16 X Line 15)	\$50,129	\$50,129	\$50,129	\$50,129	\$200,515
18	Subcontractor/Capital Expenditures					
19	Total Expenditures	\$386,131	\$386,131	\$386,131	\$386,131	\$1,544,524
20	HSA Revenues					
21	General Funds	\$386,131	\$386,131	\$386,131	\$386,131	\$1,544,524
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$386,131	\$386,131	\$386,131	\$386,131	\$1,544,524
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$386,131	\$386,131	\$386,131	\$386,131	\$1,544,524
37	Full Time Equivalent (FTE)					
39	Prepared by:		Telephone No.:			
40	HSA-CO Review Signature:		_____			
41	HSA #1					

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													
3	Bernal Heights Neighborhood Center												
4	Program: Community Services - Excelsior												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													TOTAL
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>						<u>7/1/23 - 6/30/27</u>
13	Rental of Property			\$30,731	\$30,731	\$30,731	\$30,731						\$ 122,926
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$8,240	\$8,240	\$8,240	\$8,240						\$ 32,960
15	Office Supplies, Postage			\$6,501	\$6,501	\$6,501	\$6,501						\$ 26,003
16	Building Maintenance Supplies and Repair			\$6,380	\$6,380	\$6,380	\$6,380						\$ 25,520
17	Printing and Reproduction			\$500	\$500	\$500	\$500						\$ 2,000
18	Insurance			\$4,500	\$4,500	\$4,500	\$4,500						\$ 18,000
19	Staff Training			\$2,250	\$2,250	\$2,250	\$2,250						\$ 9,000
20	Staff Travel-(Local & Out of Town)			\$3,500	\$3,500	\$3,500	\$3,500						\$ 14,000
21	Rental of Equipment			\$1,200	\$1,200	\$1,200	\$1,200						\$ 4,800
22													
23	CONSULTANTS												
24													\$ -
25													\$ -
26													
27	OTHER												
28	Program Expense			\$13,000	\$13,000	\$13,000	\$13,000						\$ 52,000
29													\$ -
30													
31	TOTAL OPERATING EXPENSE			\$ 76,802	\$ 76,802	\$ 76,802	\$ 76,802						\$ 307,209
32													
33	HSA #3												

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIP

AGENCY: Bernal Heights Neighborhood Center**FY23/24 – 26/27**

CONTRACT MAILING ADDRESS: 515 Cortland Avenue San Francisco CA 94110

DIRECTOR: Gina Dacus (Executive Director)

PHONE NO.: (415) 206-2140

SITES: (Community Services) Name of Site	Bernal Heights Neighborhood Center	Excelsior Community Center
Address and Zip	515 Cortland Avenue San Francisco CA 94110	4468 Mission Street San Francisco CA 94112
Phone Number	415-206-2140	415-206-2140
Fax Number	415-648-0793	415-334-9918
Neighborhood	Bernal Heights	Mission and Excelsior
Muni Line #s	24, 67, 14, 49	14,49,29
Person in Charge	Sophia Wong	Gina Dacus
Site Manager	Sophia Wong	Gina Dacus
Programs Offered at Site	(Community Services, Congregate Meal)	(Community Services, Congregate Meal)
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00 AM – 5:00 PM	9:00 AM – 5:00 PM <i>Saturday 9:00 AM- 3:00 PM</i>
Hours of <u>scheduled</u> programming	9:00 AM – 3:00 PM	9:00 AM – 3:00 PM
Hours of meal service	4.00	4.00
Annual number of meals at site	6,100	11,720
Average number of meals per day	25	40
Total number of service days in FY	244	293
Days closed	July 4 Independence Day Sept. 2 Labor Day Nov. 28 Thanksgiving Day Nov.29 Day After Thanksgiving Dec.18 –Dec.31 In Observance of December Holidays Jan.1- Jan. 3 In Observance of December Holidays Jan. 20 Martin Luther King Jr. Day Feb.17 Presidents Day Mar.31 Cesar Chavez Day May 25 Memorial Day	July 4 Independence Day Sept. 2 Labor Day Nov. 28 Thanksgiving Day Nov.29 Day After Thanksgiving Dec.18 –Dec.31 In Observance of December Holidays Jan.1- Jan. 4 In Observance of December Holidays Jan. 20 Martin Luther King Jr. Day Feb.17 Presidents Day Mar.31 Cesar Chavez Day May 25 Memorial Day
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
BOOKER T. WASHINGTON COMMUNITY SERVICE CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	BOOKER T. WASHINGTON COMMUNITY SERVICE CENTER
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	105	105	105	105
Activity Scheduling	265	265	265	265
Social Services	430	430	430	430
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.

5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Paulo Salta
Program Manager
DAS OCP
paulo.salta@sfgov.org

and

Ella Lee
Contract Manager
HSA OCM
ella.lee@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name

Term

Booker T. Washington Community Service Center

7/1/23 - 6/30/27

(Check One) New Renewal Modification

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

Program: Community Services					
Budget Reference Page No.(s)					7/1/23 - 6/30/27
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	Total
Expenditures					
Salaries & Benefits	\$160,020	\$160,020	\$160,020	\$160,020	\$640,080
Operating Expenses	\$31,284	\$31,284	\$31,284	\$31,284	\$125,136
Subtotal	\$191,304	\$191,304	\$191,304	\$191,304	\$765,216
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$28,696	\$28,696	\$28,696	\$28,696	\$114,784
Subcontractor/Capital Expenditures					
Total Expenditures	\$220,000	\$220,000	\$220,000	\$220,000	\$880,000
HSA Revenues					
General Funds	\$220,000	\$220,000	\$220,000	\$220,000	\$880,000
TOTAL HSA REVENUES	\$220,000	\$220,000	\$220,000	\$220,000	\$880,000
Other Revenues					
Total Revenues	\$220,000	\$220,000	\$220,000	\$220,000	\$880,000
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					6/20/2018

Booker T. Washington Community Service Center
 Program: Community Services

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	DAAS	DAAS	DAAS	DAAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Deputy director	\$120,000	0.05	100%	0.05	\$6,000	\$6,000	\$6,000	\$6,000	\$24,000
Senior programs coordinator	\$77,000	1.00	100%	1.00	\$77,000	\$77,000	\$77,000	\$77,000	\$308,000
Senior wellness manager	\$88,000	0.50	100%	0.50	\$44,000	\$44,000	\$44,000	\$44,000	\$176,000
				-					
				-					
				-					
				-					
				-					
				-					
				-					
				-					
TOTALS	\$285,000	1.55	300%	1.55	\$127,000	\$127,000	\$127,000	\$127,000	\$508,000
FRINGE BENEFIT RATE	26.00%								
EMPLOYEE FRINGE BENEFITS	\$74,100				\$33,020	\$33,020	\$33,020	\$33,020	\$132,080
TOTAL SALARIES & BENEFITS	\$359,100				\$160,020	\$160,020	\$160,020	\$160,020	\$640,080
HSA #2									6/20/2018

Booker T. Washington Community Service Center
 Program: Community Services

Appendix B, Page 3

Operating Expense Detail

<u>EXPENDITURE CATEGORY</u>	<u>TERM</u>	<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>TOTAL</u> <u>7/1/23 - 6/30/27</u>
Rental of Property						
Utilities(Elec. Water, Gas, Phone, Garbage)		\$2,500	\$2,500	\$2,500	\$2,500	\$10,000
Office Supplies, Postage						
Building Maintenance Supplies and Repair		\$2,500	\$2,500	\$2,500	\$2,500	\$10,000
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
<u>CONSULTANTS</u>						
<u>OTHER</u>						
Events and field trips		\$7,000	\$7,000	\$7,000	\$7,000	\$28,000
Workshops		\$7,000	\$7,000	\$7,000	\$7,000	\$28,000
Outreach		\$4,284	\$4,284	\$4,284	\$4,284	\$17,136
Vehicle expenditures		\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
Program supplies		\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
TOTAL OPERATING EXPENSES		\$31,284	\$31,284	\$31,284	\$31,284	\$125,136
HSA #3						6/20/2018

SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Booker T. Washington Community Service Center

FISCAL YEAR: 23/24 - 26/27

CONTRACT MAILING ADDRESS: 800 Presidio Avenue San Francisco, CA, 94115

DIRECTOR: Shakirah Simley

PHONE NO.: 415-928-6596 ext. 100

SITES: (Community Services) Name of Site	Booker T. Washington Community Service Center				
Address and Zip	800 Presidio Ave, San Francisco, CA 94115				
Phone Number	415-928-6596				
Fax Number	N/A				
Neighborhood	Western Addition, District 5 43, 38, 2				
Muni Line #s					
Person in Charge	Shakirah Simley, Executive Director				
Site Manager	Eryn Kimura, Senior Wellness Manager				
Programs Offered at Site	Victory Club Senior Wellness, Family Stabilization Center, Transitional-Age Youth, Unleashing Potential After-School, We Ready College and Career Readiness, Food Justice				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9 am to 6 pm				
Hours of <u>scheduled programming</u>	9 am to 6 pm				
Days closed	Saturday and Sunday				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes No	<input type="checkbox"/> Yes No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided

CATHOLIC CHARITIES

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

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Grantee	CATHOLIC CHARITIES
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VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	450	450	450	450
Activity Scheduling	2,000	2,000	2,000	2,000
Translation Services	850	850	850	850
Social Services	650	650	650	650
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
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Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
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 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
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 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
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 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Catholic Charities					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$490,463	\$490,463	\$490,463	\$490,463	\$1,961,852
Operating Expenses	\$118,486	\$118,486	\$118,486	\$118,486	\$473,944
Subtotal	\$608,949	\$608,949	\$608,949	\$608,949	\$2,435,796
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$91,342	\$91,342	\$91,342	\$91,342	\$365,368
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$700,291	\$700,291	\$700,291	\$700,291	\$2,801,164
DAS Revenues					
General Funds	\$700,291	\$700,291	\$700,291	\$700,291	\$2,801,164
Total DAS Revenue	\$700,291	\$700,291	\$700,291	\$700,291	\$2,801,164
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$700,291	\$700,291	\$700,291	\$700,291	\$2,801,164
Full Time Equivalent (FTE)	10.02	10.02	10.02	10.02	40.08
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)									
DAS Salaries & Benefits	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	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Position Title									
Associate Deputy Director	\$160,936	1.00	23%	0.23	\$37,015	\$37,015	\$37,015	\$37,015	\$148,060
Assistant Deputy Director	\$109,200	1.00	10%	0.10	\$10,920	\$10,920	\$10,920	\$10,920	\$43,680
Activities Coordinator	\$57,982	1.00	100%	1.00	\$57,982	\$57,982	\$57,982	\$57,982	\$231,928
Program Director	\$92,820	1.00	100%	1.00	\$92,820	\$92,820	\$92,820	\$92,820	\$371,280
Prog Asst #1	\$48,553	0.80	100%	0.80	\$38,842	\$38,842	\$38,842	\$38,842	\$155,368
Prog Asst #2	\$47,130	0.90	100%	0.90	\$42,417	\$42,417	\$42,417	\$42,417	\$169,668
Prog Asst (Art Teacher)	\$83,129	0.22	100%	0.22	\$18,288	\$18,288	\$18,288	\$18,288	\$73,152
Prog Asst #3	\$45,752	0.35	100%	0.35	\$16,013	\$16,013	\$16,013	\$16,013	\$64,052
Adult Education (Computer Instructor)	\$56,784	0.17	100%	0.17	\$9,653	\$9,653	\$9,653	\$9,653	\$38,612
Program Specialist (Supervisor)	\$79,498	0.65	20%	0.13	\$10,335	\$10,335	\$10,335	\$10,335	\$41,340
Food Service Coordinator	\$47,834	0.93	12%	0.11	\$5,338	\$5,338	\$5,338	\$5,338	\$21,352
Activities Coordinator	\$57,125	1.00	10%	0.10	\$5,713	\$5,713	\$5,713	\$5,713	\$22,852
Sr Program Admin	\$82,724	1.00	25%	0.25	\$20,681	\$20,681	\$20,681	\$20,681	\$82,724
Totals	\$969,467	10.02	800%	5.36	\$366,017	\$366,017	\$366,017	\$366,017	\$1,464,068
Fringe Benefits Rate	34%								
Employee Fringe Benefits	\$329,619				\$124,446	\$124,446	\$124,446	\$124,446	\$497,784
Total DAS Salaries and Benefits	\$1,299,086				\$490,463	\$490,463	\$490,463	\$490,463	\$1,961,852
HSA #2									

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property	\$37,589	\$37,589	\$37,589	\$37,589	\$150,356
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$2,880	\$2,880	\$2,880	\$2,880	\$11,520
Office Supplies, Postage	\$820	\$820	\$820	\$820	\$3,280
Building Maintenance Supplies and Repair	\$600	\$600	\$600	\$600	\$2,400
Printing and Reproduction	\$400	\$400	\$400	\$400	\$1,600
Insurance	\$7,846	\$7,846	\$7,846	\$7,846	\$31,384
Staff Training	\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Staff Travel	\$500	\$500	\$500	\$500	\$2,000
Rental of Equipment	\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
<u>Consultants</u>					
<u>Other</u>					
Computer Related	\$1,480	\$1,480	\$1,480	\$1,480	\$5,920
Dues, Subscription, Licensing	\$334	\$334	\$334	\$334	\$1,336
Program & Food Supplies	\$15,339	\$15,339	\$15,339	\$15,339	\$61,356
Marketing & Advertising Outreach	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Program Recruitment	\$600	\$600	\$600	\$600	\$2,400
Transportation	\$46,398	\$46,398	\$46,398	\$46,398	\$185,592
Total DAS Operating Expenses	\$118,486	\$118,486	\$118,486	\$118,486	\$473,944

HSA #3

APPENDIX F - SITE CHART

AGENCY: Catholic Charities

HSA/ DAS

FISCCAL YEAR FY 23/24 – 26/27

CONTRACT MAILING ADDRESS 990 Eddy Street, 1st Floor , San Francisco, CA 94109

CHIEF EXECUTIVE OFFICER: Ellen Hammerle

PHONE NO.: 415-972-1200

SITES:	Catholic Charities OMI Senior Center				
Name of Site					
Address and Zip	65 Beverly Street San Francisco, CA 94132				
Phone Number	415-334-5550				
Fax Number	415-334-5505				
Neighborhood	OMI / City of San Francisco				
Muni Line #s	Muni M & Route 54				
Person in Charge Site Manager	Kurlene Cambridge Hung Huynh (Tiffany)				
Programs Offered at Site	Community Services Case Management ADRC				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8:30 AM-3:00 PM & by appt				
Hours of <u>scheduled</u> programming	9:00 AM – 3:00 PM				
Hours of meal service	10:30 AM- 1:00 PM (To- go) 12:00 PM- 1:00 PM (dine-in)				
Annual number of meals at site	10,000				
Average number of meals per day	41				
Total number of service days in FY	246				
Days closed	All Holidays listed to the right	New Year’s Day, Martin Luther King Day, President’s Day, Good Friday, Memorial Day, Juneteenth,	Independence Day, Labor Day, Thanksgiving, Day after Thanksgiving, Christmas Eve, Christmas Day, 1-2 Training Days		
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
CENTRO LATINO DE SAN FRANCISCO INC

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	CENTRO LATINO DE SAN FRANCISCO INC
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	458	458	458	458
Activity Scheduling	1,502	1,502	1,502	1,502
Translation Services	143	143	143	143
Social Services	955	955	955	955
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Tahir Shaikh
Contract Manager
HSA OCM
tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Name	Term				
Centro Latino de San Francisco	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: Community Services					
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	\$113,710	\$113,710	\$113,710	\$113,710	\$454,840
Operating Expenses	\$13,443	\$13,443	\$13,443	\$13,443	\$53,772
Subtotal	\$127,153	\$127,153	\$127,153	\$127,153	\$508,612
Indirect Percentage (%)	11%	11%	11%	11%	8%
Indirect Cost (Line 16 X Line 15)	\$13,351	\$13,351	\$13,351	\$13,351	\$40,054
Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$140,504	\$140,504	\$140,504	\$140,504	\$562,016
HSA Revenues					
General Funds	\$140,504	\$140,504	\$140,504	\$140,504	\$562,016
TOTAL HSA REVENUES	\$140,504	\$140,504	\$140,504	\$140,504	\$562,016
Other Revenues					
Total Revenues	\$140,504	\$140,504	\$140,504	\$140,504	\$562,016
Full Time Equivalent (FTE)	1.71	1.71	1.71	1.71	
Prepared by:	Telephone No.:				
HSA-CO Review Signature:	_____				
HSA #1	12/2/2020				

Centro Latino de San Francisco
Program: Community Services

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		DAS 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	Total	% FTE	Adjusted	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
Executive Director	\$83,200	1.00	5%	0.05	\$4,160	\$4,160	\$4,160	\$4,160	\$16,640
Associate Director / Naturalization C	\$74,880	1.00	15%	0.15	\$11,232	\$11,232	\$11,232	\$11,232	\$44,928
Accountant / HR	\$76,960	0.50	22%	0.11	\$8,273	\$8,273	\$8,273	\$8,273	\$33,093
Accounting / Bookkeeping Assistant	\$62,400	0.20	13%	0.03	\$1,560	\$1,560	\$1,560	\$1,560	\$6,240
Social Worker Resource Specialist	\$60,320	0.94	33%	0.31	\$18,662	\$18,662	\$18,662	\$18,662	\$74,646
Nutrion Sites and C.S.P Manager	\$62,400	1.00	25%	0.25	\$15,600	\$15,600	\$15,600	\$15,600	\$62,400
Social Worker / Activities Facilitator	\$52,000	1.00	40%	0.40	\$20,800	\$20,800	\$20,800	\$20,800	\$83,200
Educator / Activities Facilitator	\$62,400	0.25	45%	0.11	\$7,020	\$7,020	\$7,020	\$7,020	\$28,080
Consumer Intake and Referrals	\$41,600	0.38	20%	0.08	\$3,120	\$3,120	\$3,120	\$3,120	\$12,480
Driver	\$45,760	0.63	9%	0.06	\$2,632	\$2,632	\$2,632	\$2,632	\$10,528
Janitor	\$41,600	0.50	12%	0.06	\$2,496	\$2,496	\$2,496	\$2,496	\$9,984
TOTALS	\$663,520	7.39	238%	1.60	\$95,555	\$95,555	\$95,555	\$95,555	\$382,220
FRINGE BENEFIT RATE	19%								
EMPLOYEE FRINGE BENEFITS	\$126,069				\$18,155	\$18,155	\$18,155	\$18,155	\$72,620
TOTAL SALARIES & BENEFITS	\$789,589				\$113,710	\$113,710	\$113,710	\$113,710	\$454,840
HSA #2									12/2/2020

Centro Latino de San Francisco
Program: Community Services**Operating Expense Detail**

<u>Expenditure Category</u>	<u>TERM</u>	<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>TOTAL</u> <u>7/1/23 - 6/30/27</u>
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage		\$2,016	\$2,016	\$2,016	\$2,016	\$8,064
Building Maintenance Supplies and Repair		\$2,258	\$2,258	\$2,258	\$2,258	\$9,032
Printing and Reproduction		\$1,024	\$1,024	\$1,024	\$1,024	\$4,096
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
Leahs Pantry		\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Dance/Excercise Instructors		\$1,800	\$1,800	\$1,800	\$1,800	\$7,200
Marketing/Website Developer		\$1,218	\$1,218	\$1,218	\$1,218	\$4,872
OTHER						
Education and Program Supplies		\$3,127	\$3,127	\$3,127	\$3,127	\$12,508
TOTAL OPERATING EXPENSE		\$13,443	\$13,443	\$13,443	\$13,443	\$53,772

HSA #3

12/2/2020

Appendix F-SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Centro Latino de San Francisco, Inc

FISCAL YEAR: FY 23-27

CONTRACT MAILING ADDRESS: 1656 15th Street SF, CA 94103

DIRECTOR: Gloria Bonilla

PHONE NO.: 415-286-0883

<u>SITES:</u> (Community Services)					
Name of Site	Centro Latino de SF				
Address and Zip	1656 15 th St. 94103				
Phone Number	415-861-8758				
Fax Number					
Neighborhood	Mission				
Muni Line #s	14L, 22, 33, 47, 49 and 71				
Person in Charge	Gloria Bonilla				
Site Manager	Omar Romero				
Programs Offered at Site	Activity Scheduling, Social Services, Translation, Naturalization, Nutrition				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9 am – 4 pm M-Sat				
Hours of <u>scheduled</u> programming	9 am – 4 pm M-Sat				
Days closed	Sunday	.			
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided

CURRY SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	Curry Senior Center
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Grantee will provide digital navigators who will be responsible for digital literacy training, tech support of personal devices, and navigation of other digital inclusion resources needed by consumers. This position shall provide one-on-one or small-group technology support to consumers and be the main point of contact for questions and concerns relating to technology at the center. Examples of duties shall include but are not limited to, assisting consumers with subscribing to low-cost internet options for their home, in-person and online troubleshooting of personal devices, research and sourcing of additional tech equipment as needed by the consumer, and collaborating with DAS and other digital inclusion service providers for coordination and exchange of information.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	300	300	300	300
Activity Scheduling	900	900	900	900
Translation Services	400	400	400	400
Social Services	1,000	1,000	1,000	1,000
Digital Navigation*	650	650	650	650
1 unit of service = 1 hour of service provision				

*1 unit of Digital Navigation = 1 hour of one-on-one or small group sessions conducted virtually or in-person at a Community Services program site, provided by staff or trained volunteers.

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Ella Lee
Contract Manager
HSA OCM
ella.lee@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name

Curry Senior Center

Term

7/1/23 - 6/30/27

(Check One) New Renewal Modification

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

Program: Community Services					
Budget Reference Page No.(s)					7/1/23 - 6/30/27
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	Total
Expenditures					
Salaries & Benefits	\$477,172	\$477,172	\$477,172	\$477,172	\$1,908,688
Operating Expenses	\$88,617	\$88,617	\$88,617	\$88,617	\$354,468
Subtotal	\$565,789	\$565,789	\$565,789	\$565,789	\$2,263,156
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$84,868	\$84,868	\$84,868	\$84,868	\$339,472
Subcontractor/Capital Expenditures	\$46,940	\$46,940	\$46,940	\$46,940	\$187,760
Total Expenditures	\$697,597	\$697,597	\$697,597	\$697,597	\$2,790,388
HSA Revenues					
Community services, Local funds	\$588,211	\$588,211	\$588,211	\$588,211	\$2,352,844
Digital navigator, Local funds	\$109,386	\$109,386	\$109,386	\$109,386	\$437,544
TOTAL HSA REVENUES	\$697,597	\$697,597	\$697,597	\$697,597	\$2,790,388
Other Revenues					
Total Revenues	\$697,597	\$697,597	\$697,597	\$697,597	\$2,790,388
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					6/20/2018

Curry Senior Center Program: Community Services		Appendix B, Page 2								
		Salaries & Benefits Detail								
		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
POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	TOTAL Budgeted Salary	
Community services										
Director of social services	\$113,159	0.25	100%	0.25	\$28,290	\$28,290	\$28,290	\$28,290	\$113,160	
Director of programs	\$148,320	0.05	100%	0.05	\$7,416	\$7,416	\$7,416	\$7,416	\$29,664	
Senior center program manager	\$74,094	0.50	100%	0.50	\$37,047	\$37,047	\$37,047	\$37,047	\$148,188	
LGBTQ+ program manager	\$62,264	1.00	100%	1.00	\$62,264	\$62,264	\$62,264	\$62,264	\$249,056	
Program assistant- Lao	\$54,600	0.23	100%	0.23	\$12,804	\$12,804	\$12,804	\$12,804	\$51,216	
Program assistant- Russian	\$54,600	0.23	100%	0.23	\$12,804	\$12,804	\$12,804	\$12,804	\$51,216	
Program assistant- Vietnamese (2)	\$54,600	0.80	100%	0.80	\$43,680	\$43,680	\$43,680	\$43,680	\$174,720	
Program assistant- Tagalog	\$55,234	0.60	100%	0.60	\$33,140	\$33,140	\$33,140	\$33,140	\$132,560	
Program assistant- Chinese	\$54,600	0.40	100%	0.40	\$21,840	\$21,840	\$21,840	\$21,840	\$87,360	
Program assistant- LGBT	\$54,600	0.80	100%	0.80	\$43,680	\$43,680	\$43,680	\$43,680	\$174,720	
Program advocate	\$54,600	0.05	100%	0.05	\$2,730	\$2,730	\$2,730	\$2,730	\$10,920	
				-						
				-						
				-						
Digital navigator										
Technology program manager	\$75,192	0.05	100%	0.05	\$3,760	\$3,760	\$3,760	\$3,760	\$15,040	
Director of programs	\$150,000	0.02	100%	0.02	\$3,000	\$3,000	\$3,000	\$3,000	\$12,000	
Tech navigator	\$54,600	1.00	100%	1.00	\$54,600	\$54,600	\$54,600	\$54,600	\$218,400	
				-						
				-						
				-						
TOTALS	\$1,060,463	5.19	1100%	5.19	\$367,055	\$367,055	\$367,055	\$367,055	\$1,468,220	
FRINGE BENEFIT RATE	30.00%									
EMPLOYEE FRINGE BENEFITS	\$318,139				\$110,117	\$110,117	\$110,117	\$110,117	\$440,468	
TOTAL SALARIES & BENEFITS	\$1,378,602				\$477,172	\$477,172	\$477,172	\$477,172	\$1,908,688	
HSA #2									6/20/2018	

Curry Senior Center
 Program: Community Services

Operating Expense Detail

EXPENDITURE CATEGORY	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	TOTAL 7/1/23 - 6/30/27
Community services						
Rental of Property		\$22,519	\$22,519	\$22,519	\$22,519	\$90,076
Utilities(Elec, Water, Gas, Phone, Garbage)		\$11,000	\$11,000	\$11,000	\$11,000	\$44,000
Office Supplies, Postage		\$6,000	\$6,000	\$6,000	\$6,000	\$24,000
Building Maintenance Supplies and Repair		\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
Printing and Reproduction						
Insurance		\$5,500	\$5,500	\$5,500	\$5,500	\$22,000
Staff Training		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Staff Travel-(Local & Out of Town)		\$600	\$600	\$600	\$600	\$2,400
Rental of Equipment						
Digital navigator						
Rental of Property		\$5,500	\$5,500	\$5,500	\$5,500	\$22,000
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,338	\$1,338	\$1,338	\$1,338	\$5,352
Office Supplies, Postage		\$500	\$500	\$500	\$500	\$2,000
Building Maintenance Supplies and Repair		\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Printing and Reproduction						
Insurance		\$500	\$500	\$500	\$500	\$2,000
Staff Training		\$300	\$300	\$300	\$300	\$1,200
Staff Travel-(Local & Out of Town)		\$200	\$200	\$200	\$200	\$800
Rental of Equipment						
CONSULTANTS						
Community services						
Movement and meditation- Tai Chi		\$2,600	\$2,600	\$2,600	\$2,600	\$10,400
Digital navigator						
OTHER						
Community services						
Program supplies		\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
Payroll fees		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Recruitment		\$500	\$500	\$500	\$500	\$2,000
Computer support		\$10,800	\$10,800	\$10,800	\$10,800	\$43,200
Digital navigator						
Program supplies		\$800	\$800	\$800	\$800	\$3,200
Payroll fees		\$300	\$300	\$300	\$300	\$1,200
Recruitment		\$500	\$500	\$500	\$500	\$2,000
Computer support		\$2,160	\$2,160	\$2,160	\$2,160	\$8,640
TOTAL OPERATING EXPENSES		\$88,617	\$88,617	\$88,617	\$88,617	\$354,468
HSA #3						6/20/2018

	A	B	C	D	E	F	G
1	Curry Senior Center						Appendix B, Page 4
2	Program: Community Services						
3							
4							
5	Subcontractor/Capital Expenditures						
6							
7	<u>SUBCONTRACTORS</u>		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
8	Community services						
9							
10							
11							
12	Tech navigator						
13							
14							
15							
16	TOTAL SUBCONTRACTOR COST						
17							
18	<u>EQUIPMENT</u>						
19	Community services						
20							
21							
22							
23	Tech navigator						
24							
25							
26							
27	TOTAL EQUIPMENT COST						
28							
29	<u>OTHER</u>						
30	Community services						
31	St. Anthony's outreach and safety		\$32,000	\$32,000	\$32,000	\$32,000	\$128,000
32	Transportation- Uber Health		\$13,500	\$13,500	\$13,500	\$13,500	\$54,000
33							
34	Tech navigator						
35	Transportation- Uber Health		\$1,440	\$1,440	\$1,440	\$1,440	\$5,760
36							
37							
38	TOTAL REMODELING COST		\$46,940	\$46,940	\$46,940	\$46,940	\$187,760
39							
40	TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE		\$46,940	\$46,940	\$46,940	\$46,940	\$187,760
41							
42	HSA #4						6/20/2018

APPENDIX F - SITE CHART

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

AGENCY: Curry Senior Center

FISCAL YEAR: FY 23/24 – FY 26/27

DIRECTOR: David Knego, MSW

PHONE No: 415-292-1087

SITES:					
Name of Site	Curry Senior Center	Curry Senior Drop-In			
Address and Zip	315 Turk Street, 94102	333 Turk Street, 94102			
Phone Number	415-920-1351	415-292-1081			
Fax Number					
Neighborhood	Tenderloin	Tenderloin			
Muni Line #s	31 and 27	31 and 27			
Person in Charge	Dave Knego, Executive Director	Dave Knego, Executive Director			
Site Manger	Judy Siu, Program Manager	Rashaad Bess, Program Manager			
Programs Offered at Site	Primary Health Care, Congregate Dining, Case Management, Behavioral Health, Technology training, Wellness, Social programs	Low Threshold Drop-In			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun			
Hours Open	M-F, 9-4:30 S, 9-1:30	M-Su, 8-1:30			
Hours of <u>scheduled</u> programming	M-F, 9-4:30 S, 9-1:30	M-Su, 8-1:30			
Hours of service	M-F, 9-4:30 S, 9-1:30	M-Su, 8-1:30			
Annual number of units at site					
Average number of units per day					
Total number of service days in FY					
Days closed	11	11			
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

Appendix A - Services to be Provided
EPISCOPAL COMMUNITY SERVICES

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	Episcopal Community Services
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.
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OCM	Office of Contract Management, San Francisco Human Services Agency.
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SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	540	540	540	540
Activity Scheduling	2,400	2,400	2,400	2,400
Translation Services	454	454	454	454
Social Services	1,377	1,377	1,377	1,377
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Rocio Duenas
Contract Manager
HSA OCM
rocio.duenas@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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		Term			
6	Episcopal Community Services		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community 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	Total
12	Expenditures					
13	Salaries & Benefits	\$232,241	\$232,241	\$232,241	\$232,241	\$928,963
14	Operating Expenses	\$42,244	\$42,244	\$42,244	\$42,244	\$168,974
15	Subtotal	\$274,484	\$274,484	\$274,484	\$274,484	\$1,097,937
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$41,173	\$41,173	\$41,173	\$41,173	\$164,691
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$315,657	\$315,657	\$315,657	\$315,657	\$1,262,628
20	HSA Revenues					
21	General Funds	\$315,657	\$315,657	\$315,657	\$315,657	\$1,262,628
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$315,657	\$315,657	\$315,657	\$315,657	\$1,262,628
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$315,657	\$315,657	\$315,657	\$315,657	\$1,262,628
37	Full Time Equivalent (FTE)					
39	Prepared by: Tiffany Luong		Telephone No.: 415-487-3300 x 1219			
40	HSA-CO Review Signature: _____					
41	HSA #1					12/2/2020

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3	Episcopal Community Services									
4	Program: Community Services									
5										
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	7/1/23 - 6/30/27
		Agency Totals		HSA Program		DAS	DAS	DAS	DAS	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Director of Healthy Aging	\$148,431	1.00	25%	0.25	\$37,108	\$37,108	\$37,108	\$37,108	\$148,431
14	Program Manager	\$101,891	1.00	50%	0.50	\$50,945	\$50,945	\$50,945	\$50,945	\$203,781
15	Senior Services Specialist	\$73,786	1.00	100%	1.00	\$73,786	\$73,786	\$73,786	\$73,786	\$295,144
16	Activities Coordinator	\$51,112	1.00	50%	0.25	\$12,778	\$12,778	\$12,778	\$12,778	\$51,112
18										
29										
30										
31	TOTALS	\$442,677	5.00	225%	2.00	\$174,617	\$174,617	\$174,617	\$174,617	\$698,468
32										
33	FRINGE BENEFIT RATE	33%								
34	EMPLOYEE FRINGE BENEFITS	\$146,083				\$57,624	\$57,624	\$57,624	\$57,624	\$230,495
35										
36										
37	TOTAL SALARIES & BENEFITS	\$588,760				\$232,241	\$232,241	\$232,241	\$232,241	\$928,963
38	HSA #2									12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													
3	Episcopal Community Services												
4	Program: Community Services												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													TOTAL
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>						<u>7/1/23 - 6/30/27</u>
13	Rental of Property												\$ -
14	Utilities(Elec, Water, Gas, Phone, Garbage)												\$ -
15	Office Supplies, Postage			\$4,500	\$4,500	\$4,500	\$4,500						\$ 18,000
16	Building Maintenance Supplies and Repair			\$19,000	\$19,000	\$19,000	\$19,000						\$ 76,000
17	Printing and Reproduction			\$100	\$100	\$100	\$100						\$ 400
18	Insurance			\$4,500	\$4,500	\$4,500	\$4,500						\$ 18,000
19	Staff Training			\$1,294	\$1,294	\$1,294	\$1,294						\$ 5,174
20	Staff Travel-(Local & Out of Town)			\$250	\$250	\$250	\$250						\$ 1,000
21	Staff Recruitment			\$100	\$100	\$100	\$100						\$ 400
22	IT Equipment												\$ -
23	CONSULTANTS												
24													\$ -
25													\$ -
26													
27	OTHER												
28	Program Supplies			\$8,500	\$8,500	\$8,500	\$8,500						\$ 34,000
29	Telecommunications			\$4,000	\$4,000	\$4,000	\$4,000						\$ 16,000
30													
31	TOTAL OPERATING EXPENSE			\$ 42,244	\$ 42,244	\$ 42,244	\$ 42,244						\$ 168,974
32													
33	HSA #3												12/2/2020

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Episcopal Community Services

FISCAL YEAR: FY23/24 – FY26/27

CONTRACT MAILING ADDRESS: 165 8th Street, San Francisco, CA 94103

DIRECTOR: Liz Tarzon

PHONE NO.: 510-487-3300 x6211

SITES: (Community Services) Name of Site	Canon Kip Senior Center				
Address and Zip	705 Natoma St., 94103				
Phone Number	415-487-3300				
Fax Number					
Neighborhood	South of Market				
Muni Line #s	19				
Person in Charge	Liz Tarzon				
Site Manager	Teresa Tan				
Programs Offered at Site	Hot Lunch, Case Management, Activities, Drop-in Social Services, Translation Services				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8:30am – 5pm				
Hours of <u>scheduled</u> programming	9am-2pm				
Days closed	Saturday/Sunday, Holidays	.			
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided

FELTON INSTITUTE

Community Services

July 1, 2023 to June 30, 2027

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Grantee	FELTON INSTITUTE
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.
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 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	288	288	288	288
Activity Scheduling	1104	1104	1104	1104
Translation Services	300	300	300	300
Social Services	200	200	200	200
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served

- Number and type of service units provided
4. 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.
 5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Rocio Duenas
Contract Manager
HSA OCM
rocio.duenas@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted

mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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		Term			
6	Felton Institute		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community 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	Total
12	Expenditures					
13	Salaries & Benefits	\$175,856	\$175,856	\$175,856	\$175,856	\$703,422
14	Operating Expenses	\$27,443	\$27,443	\$27,443	\$27,443	\$109,772
15	Subtotal	\$203,299	\$203,299	\$203,299	\$203,299	\$813,194
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$30,495	\$30,495	\$30,495	\$30,495	\$121,979
18	Subcontractor/Capital Expenditures	\$65,577	\$65,577	\$65,577	\$65,577	\$262,308
19	Total Expenditures	\$299,370	\$299,370	\$299,370	\$299,370	\$1,197,480
20	HSA Revenues					
21	General Funds	\$299,370	\$299,370	\$299,370	\$299,370	\$1,197,480
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$299,370	\$299,370	\$299,370	\$299,370	\$1,197,480
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$299,370	\$299,370	\$299,370	\$299,370	\$1,197,480
37	Full Time Equivalent (FTE)					
39	Prepared by:		Telephone No.:			
40	HSA-CO Review Signature:		_____			
41	HSA #1					12/2/2020

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	Felton Institute									
4	Program: Community Services									
5										
6										
7	Salaries & Benefits Detail									
8										
9										
10										
11		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
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Program Manager	\$88,250	0.53	28%	0.15	\$13,099	\$13,099	\$13,099	\$13,099	\$52,394
14	Activities Supervisor	\$63,750	1.00	100%	1.00	\$63,750	\$63,750	\$63,750	\$63,750	\$255,000
15	Senior Division Director	\$172,000	1.00	2%	0.02	\$3,113	\$3,113	\$3,113	\$3,113	\$12,453
16	Tech-Squad Program Coordinator	\$61,875	1.00	11%	0.11	\$6,806	\$6,806	\$6,806	\$6,806	\$27,225
17	Community Liaison	\$44,850	0.24	100%	0.24	\$10,764	\$10,764	\$10,764	\$10,764	\$43,056
18	Community Liaison	\$42,900	0.23	100%	0.23	\$9,900	\$9,900	\$9,900	\$9,900	\$39,600
19	Community Liaison	\$42,900	0.23	100%	0.23	\$9,900	\$9,900	\$9,900	\$9,900	\$39,600
20	Community Liaison	\$44,850	0.31	100%	0.31	\$13,904	\$13,904	\$13,904	\$13,904	\$55,614
21										
22										
23										
24	TOTALS	\$561,375	4.54	541%	2.29	\$131,236	\$131,236	\$131,236	\$131,236	\$524,942
25										
26	FRINGE BENEFIT RATE	34%								
27	EMPLOYEE FRINGE BENEFITS	\$190,868				\$44,620	\$44,620	\$44,620	\$44,620	\$178,480
28										
29										
30	TOTAL SALARIES & BENEFITS	\$752,243				\$175,856	\$175,856	\$175,856	\$175,856	\$703,422
31	HSA #2									

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													
3	Felton Institute												
4	Program: Community Services												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													TOTAL
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>						<u>7/1/23 - 6/30/27</u>
13	Rental of Property			\$8,400	\$8,400	\$8,400	\$8,400						\$ 33,600
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$11,543	\$11,543	\$11,543	\$11,543						\$ 46,172
15	Office Supplies, Postage			\$1,000	\$1,000	\$1,000	\$1,000						\$ 4,000
16	Building Maintenance Supplies and Repair												\$ -
17	Printing and Reproduction			\$1,000	\$1,000	\$1,000	\$1,000						\$ 4,000
18	Insurance			\$2,000	\$2,000	\$2,000	\$2,000						\$ 8,000
19	Staff Training												\$ -
20	Staff Travel-(Local & Out of Town)			\$500	\$500	\$500	\$500						\$ 2,000
21	Rental of Equipment												\$ -
22													
23	CONSULTANTS												
24													\$ -
25													\$ -
26													
27	OTHER												
28													\$ -
29	Activities Supplies and Program Expenses			\$3,000	\$3,000	\$3,000	\$3,000						\$ 12,000
30													
31	TOTAL OPERATING EXPENSE			\$ 27,443	\$ 27,443	\$ 27,443	\$ 27,443						\$ 109,772
32													
33	HSA #3												12/2/2020

	A	B	C	D	E	F	G
1							
2							
3		Felton Institute					
4		Program: Community Services					
5							
6							
7							
8							
9							
10		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	7/1/23 - 6/30/27
11		Asian Pacific American Community Center	\$44,577	\$44,577	\$44,577	\$44,577	\$178,308
12		ESL teacher	\$21,000	\$21,000	\$21,000	\$21,000	\$84,000
13							
14							
15							
16		TOTAL SUBCONTRACTOR COST	\$65,577	\$65,577	\$65,577	\$65,577	\$262,308
17							
18							
19		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	7/1/23 - 6/30/27
20	Units	ITEM/DESCRIPTION					
21							
22							
23							
24							
25		TOTAL EQUIPMENT COST					
26							
27		OTHER	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
28		Description:					
29		Remodel A					
30							
31							
32		TOTAL REMODELING COST					
33							
34		TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE	\$65,577	\$65,577	\$65,577	\$65,577	\$262,308
35							
36		HSA #4					12/2/2020

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Felton Institute

FISCAL YEAR: 2023-27

CONTRACT MAILING ADDRESS: 1005 Atlantic Avenue Alameda, CA 94501

DIRECTOR: Edith Yamanoha

PHONE NO.: 415-623-0701

SITES: (Community Services) Name of Site	66 Raymond Visitacion Valley Community Hub	1099 Sunnydale The Village			
Address and Zip Phone Number: Fax Number Neighborhood: Muni Line #s Person in Charge Site Manager	66 Raymond Ave, 94134 (415) 574-5935 Visitacion Valley 9, 9R, 8 and T-line Edith Yamanoha and Roland Soriano Roland Soriano	1099 Sunnydale Ave, 94134 (415) 574-5935 Visitacion Valley Muni lines #9 and #56 Edith Yamanoha and Roland Soriano Roland Soriano			
Programs Offered at Site	See attached list	See attached list			
Days Open	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open					
Hours of <u>scheduled</u> programming:	9-2PM Mon-Thurs	9-4:30PM			
Days closed	Fri, Sat and Sun	Sat and Sun .			
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
GOLDEN GATE SENIOR SERVICES – CASTRO CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	GOLDEN GATE SENIOR SERVICES (Castro)
Higher Learning Classes	College-level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco's Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.

Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational,

and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:

- i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
 - ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are

contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Higher Learning classes will be offered at Castro Senior Center / Golden Gate Senior Services. These classes will be open to any older adult or adult with disabilities interested. A participant will register for class(es) as a separate program of the community service center. The course topic is “Principles of Balance.” These classes are college-level classes taught by instructors with advanced degrees and teaching experience in the field of study.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	325	325	325	325
Activity Scheduling	2,420	2,420	2,420	2,420
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

Higher Learning

1. Class participants report that the course increased their socialization opportunities and interaction with others. Target: 80%
2. Class participants report an increase in knowledge of the Higher Learning course topic. Target: 80%

Based on a satisfaction survey created by the grantee with input from DAS OCP and with a sample size of at least 75% of the participants enrolled in the class.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Ella Lee
Contract Manager
HSA OCM
ella.lee@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Golden Gate Senior Services					Term 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: Community Services at Castro Senior Center					
Budget Reference Page No.(s)	7/1/23 - 6/30/27				
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	Total
Expenditures					
Salaries & Benefits	\$126,338	\$126,338	\$126,338	\$126,338	\$505,352
Operating Expenses	\$76,657	\$76,657	\$76,657	\$76,657	\$306,628
Subtotal	\$202,995	\$202,995	\$202,995	\$202,995	\$811,980
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$30,449	\$30,449	\$30,449	\$30,449	\$121,796
Subcontractor/Capital Expenditures					
Total Expenditures	\$233,444	\$233,444	\$233,444	\$233,444	\$933,776
HSA Revenues					
Local Funds	\$233,444	\$233,444	\$233,444	\$233,444	\$933,776
TOTAL HSA REVENUES	\$233,444	\$233,444	\$233,444	\$233,444	\$933,776
Other Revenues					
Total Revenues	\$233,444	\$233,444	\$233,444	\$233,444	\$933,776
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					6/20/2018

Program: Community Services at Castro Senior Center

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	DAAS	DAAS	DAAS	DAAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Castro Senior Center director	\$88,853	1.00	100%	1.00	\$88,853	\$88,853	\$88,853	\$88,853	\$355,412
Program coordinator	\$52,000	0.20	100%	0.20	\$10,400	\$10,400	\$10,400	\$10,400	\$41,600
Program instructor	\$52,000	0.30	100%	0.30	\$15,600	\$15,600	\$15,600	\$15,600	\$62,400
				-					
				-					
				-					
				-					
				-					
				-					
				-					
				-					
TOTALS	\$192,853	1.50	300%	1.50	\$114,853	\$114,853	\$114,853	\$114,853	\$459,412
FRINGE BENEFIT RATE	10.00%								
EMPLOYEE FRINGE BENEFITS	\$19,285				\$11,485	\$11,485	\$11,485	\$11,485	\$45,940
TOTAL SALARIES & BENEFITS	\$212,138				\$126,338	\$126,338	\$126,338	\$126,338	\$505,352
HSA #2									6/20/2018

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		\$40,947	\$40,947	\$40,947	\$40,947	\$163,788
Utilities(Elec, Water, Gas, Phone, Garbage)		\$6,810	\$6,810	\$6,810	\$6,810	\$27,240
Office Supplies, Postage		\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
Building Maintenance Supplies and Repair		\$10,800	\$10,800	\$10,800	\$10,800	\$43,200
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
OTHER						
Programs and Events		\$9,000	\$9,000	\$9,000	\$9,000	\$36,000
Higher learning class		\$7,600	\$7,600	\$7,600	\$7,600	\$30,400
TOTAL OPERATING EXPENSES		\$76,657	\$76,657	\$76,657	\$76,657	\$306,628
HSA #3						6/20/2018

APPENDIX F - SITE CHART

Page 1 of 1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Golden Gate Senior Services

FISCAL YEAR: FY 23/24 - 26/27

CONTRACT MAILING ADDRESS: 6221 Geary Blvd. Floor 3, San Francisco, CA 94121

DIRECTOR: Nicholas Lederer

PHONE NO.: (415)752-6444

SITES: (Community Services)		
Name of Site	Richmond Senior Center	Castro Senior Center
Address and Zip	6221 Geary Blvd., 3 rd Fl. San Francisco, CA 94121	110 Diamond Blvd. San Francisco, CA 94114
Phone Number	(415)752-6444	(415) 863-3507
Fax Number	None	(415) 252-7495
Neighborhood	Richmond District 1	Castro District 8
Muni Line #s	1, 28, 38	33, 8, 24, 35, 37
Person in Charge	Nicholas Lederer, Executive Director	Nicholas Lederer, Executive Director
Site Manager	Kaleda Walling, RSC Director	Patrick Larkin, CSC Director
Programs Offered at Site	ADRC Community Bridge/Golden Gate Village Community Service Congregate Lunch Emergency Preparedness Home Delivered Groceries SF Connected Computer Lab Project Integration	Older Adult Choir Community Service Congregate Lunch Health Promotion LGBTQSA+ Outreach Project Integration SF Connected Computer Lab
Days Open	<u> X </u> Mon <u> X </u> Tues <u> X </u> Wed <u> X </u> Thurs <u> X </u> Fri <u> Occasional </u> Sat <u> Occasional </u> Sun	<u> X </u> Mon <u> X </u> Tues <u> X </u> Wed <u> X </u> Thurs <u> X </u> Fri <u> </u> Sat <u> </u> Sun
Hours Open	8:30 AM – 4:00 PM	8:30 AM – 4:00 PM
Hours of <u>scheduled</u> programming	9:00 AM – 4:00 PM	8:30 AM – 4:00 PM
Days closed	15 holidays: Juneteenth, Independence Day, Labor Day, Indigenous People's Day, Veteran's Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve Day, Christmas Day, New Year's Eve, New Year's Day, MLK Jr. Day, President's Day, Cesar Chavez Day, and Memorial Day.	15 holidays: Juneteenth, Independence Day, Labor Day, Indigenous People's Day, Veteran's Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve Day, Christmas Day, New Year's Eve, New Year's Day, MLK Jr. Day, President's Day, Cesar Chavez Day, and Memorial Day.
ADA Accessible	<u> X </u> Yes <u> </u> No	<u> X </u> Yes <u> </u> No

Appendix A - Services to be Provided
GOLDEN GATE SENIOR SERVICES – RICHMOND CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	GOLDEN GATE SENIOR SERVICES (Richmond)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	400	400	400	400
Activity Scheduling	1,875	1,875	1,875	1,875
Translation Services	400	400	400	400
Social Services	450	450	450	450
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Ella Lee
Contract Manager
HSA OCM
ella.lee@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name	Term				
Golden Gate Senior Services	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: Community Services at Richmond Senior Center					
Budget Reference Page No.(s)					7/1/23 - 6/30/27
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	Total
Expenditures					
Salaries & Benefits	\$410,858	\$410,858	\$410,858	\$410,858	\$1,643,432
Operating Expenses	\$22,626	\$22,626	\$22,626	\$22,626	\$90,504
Subtotal	\$433,484	\$433,484	\$433,484	\$433,484	\$1,733,936
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$65,022	\$65,022	\$65,022	\$65,022	\$260,088
Subcontractor/Capital Expenditures					
Total Expenditures	\$498,506	\$498,506	\$498,506	\$498,506	\$1,994,024
HSA Revenues					
General Funds	\$498,506	\$498,506	\$498,506	\$498,506	\$1,994,024
TOTAL HSA REVENUES	\$498,506	\$498,506	\$498,506	\$498,506	\$1,994,024
Other Revenues					
Project integration	\$5,300	\$5,300	\$5,300	\$5,300	\$21,200
Donation in-kind	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Fundraising and case donations	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
Total Revenues	\$518,806	\$518,806	\$518,806	\$518,806	\$2,075,224
Full Time Equivalent (FTE)					
Prepared by:	Telephone No.:				
HSA-CO Review Signature: _____					
HSA #1	6/20/2018				

Program: Community Services at Richmond Senior Center

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	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	TOTAL Budgeted Salary
Activity liaison	\$64,896	0.55	100%	0.55	\$35,693	\$35,693	\$35,693	\$35,693	\$142,772
Bilingual center coordinator	\$54,080	1.00	100%	1.00	\$54,080	\$54,080	\$54,080	\$54,080	\$216,320
Community programs director	\$79,000	0.95	100%	0.95	\$75,050	\$75,050	\$75,050	\$75,050	\$300,200
Facilities maintenance technician	\$60,320	0.75	100%	0.75	\$45,240	\$45,240	\$45,240	\$45,240	\$180,960
Operations manager	\$70,720	0.75	100%	0.75	\$53,040	\$53,040	\$53,040	\$53,040	\$212,160
Richmond Senior Center director	\$118,976	0.45	100%	0.45	\$53,539	\$53,539	\$53,539	\$53,539	\$214,156
Volunteer manager	\$68,640	0.38	100%	0.38	\$25,740	\$25,740	\$25,740	\$25,740	\$102,960
				-					
				-					
				-					
				-					
TOTALS	\$516,632	4.83	700%	4.83	\$342,382	\$342,382	\$342,382	\$342,382	\$1,369,528
FRINGE BENEFIT RATE	20.00%								
EMPLOYEE FRINGE BENEFITS	\$103,326				\$68,476	\$68,476	\$68,476	\$68,476	\$273,904
TOTAL SALARIES & BENEFITS	\$619,958				\$410,858	\$410,858	\$410,858	\$410,858	\$1,643,432
HSA #2									6/20/2018

Golden Gate Senior Services

Appendix B, Page 3

Program: Community Services at Richmond Senior Center

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		\$10,800	\$10,800	\$10,800	\$10,800	\$43,200
Utilities(Elec. Water, Gas, Phone, Garbage)		\$560	\$560	\$560	\$560	\$2,240
Office Supplies, Postage		\$1,266	\$1,266	\$1,266	\$1,266	\$5,064
Building Maintenance Supplies and Repair		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Printing and Reproduction						
Insurance						
Staff Training		\$800	\$800	\$800	\$800	\$3,200
Staff Travel-(Local & Out of Town)		\$200	\$200	\$200	\$200	\$800
Rental of Equipment						
CONSULTANTS						
OTHER						
IT Web support		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Programs and events		\$7,000	\$7,000	\$7,000	\$7,000	\$28,000
TOTAL OPERATING EXPENSES		\$22,626	\$22,626	\$22,626	\$22,626	\$90,504
HSA #3						6/20/2018

SITE CHART

Page 1 of 1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Golden Gate Senior Services

FISCAL YEAR: FY 23/24 - 26/27

CONTRACT MAILING ADDRESS: 6221 Geary Blvd. Floor 3, San Francisco, CA 94121

DIRECTOR: Nicholas Lederer

PHONE NO.: (415)752-6444

SITES: (Community Services)		
Name of Site	Richmond Senior Center	Castro Senior Center
Address and Zip	6221 Geary Blvd., 3 rd Fl. San Francisco, CA 94121	110 Diamond Blvd. San Francisco, CA 94114
Phone Number	(415)752-6444	(415) 863-3507
Fax Number	None	(415) 252-7495
Neighborhood	Richmond District 1	Castro District 8
Muni Line #s	1, 28, 38	33, 8, 24, 35, 37
Person in Charge	Nicholas Lederer, Executive Director	Nicholas Lederer, Executive Director
Site Manager	Kaleda Walling, RSC Director	Patrick Larkin, CSC Director
Programs Offered at Site	ADRC Community Bridge/Golden Gate Village Community Service Congregate Lunch Emergency Preparedness Home Delivered Groceries SF Connected Computer Lab Project Integration	Older Adult Choir Community Service Congregate Lunch Health Promotion LGBTQSA+ Outreach Project Integration SF Connected Computer Lab
Days Open	<u> X </u> Mon <u> X </u> Tues <u> X </u> Wed <u> X </u> Thurs <u> X </u> Fri <u> Occasional </u> Sat <u> Occasional </u> Sun	<u> X </u> Mon <u> X </u> Tues <u> X </u> Wed <u> X </u> Thurs <u> X </u> Fri <u> </u> Sat <u> </u> Sun
Hours Open	8:30 AM – 4:00 PM	8:30 AM – 4:00 PM
Hours of <u>scheduled</u> programming	9:00 AM – 4:00 PM	8:30 AM – 4:00 PM
Days closed	15 holidays: Juneteenth, Independence Day, Labor Day, Indigenous People's Day, Veteran's Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve Day, Christmas Day, New Year's Eve, New Year's Day, MLK Jr. Day, President's Day, Cesar Chavez Day, and Memorial Day.	15 holidays: Juneteenth, Independence Day, Labor Day, Indigenous People's Day, Veteran's Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve Day, Christmas Day, New Year's Eve, New Year's Day, MLK Jr. Day, President's Day, Cesar Chavez Day, and Memorial Day.
ADA Accessible	<u> X </u> Yes <u> </u> No	<u> X </u> Yes <u> </u> No

Appendix A - Services to be Provided
INDEPENDENT LIVING RESOURCE CENTER OF SAN FRANCISCO

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	INDEPENDENT LIVING RESRC CENTER OF S F
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	75	75	75	120
Activity Scheduling	500	500	500	500
Translation Services	25	25	25	25
Social Services	150	150	150	150
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Independent Living Resource Center (ILRC)					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$74,595	\$74,595	\$74,595	\$74,595	\$298,380
Operating Expenses	\$43,900	\$43,900	\$43,900	\$43,900	\$175,600
Subtotal	\$118,495	\$118,495	\$118,495	\$118,495	\$473,980
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$17,774	\$17,774	\$17,774	\$17,774	\$71,096
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$136,269	\$136,269	\$136,269	\$136,269	\$545,076
DAS Revenues					
General Funds	\$136,269	\$136,269	\$136,269	\$136,269	\$545,076
Total DAS Revenue	\$136,269	\$136,269	\$136,269	\$136,269	\$545,076
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$136,269	\$136,269	\$136,269	\$136,269	\$545,076
Full Time Equivalent (FTE)	1.03	1.03	1.03	1.03	4.12
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)

DAS Salaries & Benefits	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	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Position Title									
Community Activities Coordinator	\$52,831	0.40	100%	0.40	\$21,132	\$21,132	\$21,132	\$21,132	\$84,528
Community Activities Assistant	\$35,752	0.20	80%	0.16	\$5,720	\$5,720	\$5,720	\$5,720	\$22,880
Director of Public Policy	\$65,843	0.30	100%	0.30	\$19,753	\$19,753	\$19,753	\$19,753	\$79,012
Administrative Director	\$71,805	0.08	100%	0.08	\$5,744	\$5,744	\$5,744	\$5,744	\$22,976
Executive Director	\$132,831	0.05	100%	0.05	\$6,642	\$6,642	\$6,642	\$6,642	\$26,568
Totals	\$359,062	1.03	480%	0.99	\$58,991	\$58,991	\$58,991	\$58,991	\$235,964
Fringe Benefits Rate	26%								
Employee Fringe Benefits	\$94,975				\$15,604	\$15,604	\$15,604	\$15,604	\$62,416
Total DAS Salaries and Benefits	\$454,037				\$74,595	\$74,595	\$74,595	\$74,595	\$298,380
HSA #2									

Operating Expense Detail

(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
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property	\$13,300	\$13,300	\$13,300	\$13,300	\$53,200
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$2,800	\$2,800	\$2,800	\$2,800	\$11,200
Office Supplies, Postage	\$350	\$350	\$350	\$350	\$1,400
Building Maintenance Supplies and Repair	\$700	\$700	\$700	\$700	\$2,800
Printing and Reproduction	\$100	\$100	\$100	\$100	\$400
Insurance	\$3,100	\$3,100	\$3,100	\$3,100	\$12,400
Staff Training	\$500	\$500	\$500	\$500	\$2,000
Staff Travel	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Rental of Equipment	\$300	\$300	\$300	\$300	\$1,200
<u>Consultants</u>					
Sign Language/Translation/Workshop Facilitator	\$13,500	\$13,500	\$13,500	\$13,500	\$54,000
IT Support	\$500	\$500	\$500	\$500	\$2,000
<u>Other</u>					
Dues and Subscriptions	\$950	\$950	\$950	\$950	\$3,800
Program Supplies	\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Client Activities Food	\$1,400	\$1,400	\$1,400	\$1,400	\$5,600
Outreach and Education	\$200	\$200	\$200	\$200	\$800
Client Activities Events	\$4,000	\$4,000	\$4,000	\$4,000	\$16,000
Total DAS Operating Expenses	\$43,900	\$43,900	\$43,900	\$43,900	\$175,600

HSA #3

APPENDIX F - SITE CHART

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

AGENCY: Independent Living Resource Center San Francisco

FISCAL YEAR: 23/24 – 26/27

CONTRACT: Community Services

DIRECTOR: Lana Nieves

PHONE NO.: 415-543-6222

SITES:	ILRCSF				
Name of Site					
Address and Zip	825 Howard Street San Francisco, CA 94103				
Phone Number	415-543-6222				
Fax Number	N/A				
Neighborhood	SOMA/Citywide Services				
Muni Line #s	M,N,L,T,K, 14,30,8, 8bx,8ax,45, 15, 38, 27				
Person in Charge & Site Manager	Lana Nieves				
Programs Offered at Site	Options Counseling Support and Advocacy Independent Living Skills Financial Literacy Training Economic Independence Assistive Technology Support Technology Lending Library Technology and Durable Medical Equipment Reuse Program Legal, Including Notary Services Healthcare Access Benefits Support Peer Mentorship/Support Advocacy training Information and Referral Community Activities Multi-lingual Services Wheelchair Repair Transition Support				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri (Some weekends as needed)				
Hours Open	9:30-4:30, some evenings, by appointment or scheduled event.				
Hours of <u>scheduled</u> programming	M-F 9:30-4:30, some Evenings and Weekends				
Days closed	Most Saturdays and Sundays				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided

KIMOCHI INC

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

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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	KIMOCHI INC
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.
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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:

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- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

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 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Grantee will provide digital navigators who will be responsible for digital literacy training, tech support of personal devices, and navigation of other digital inclusion resources needed by consumers. This position shall provide one-on-one or small-group technology support to consumers and be the main point of contact for questions and concerns relating to technology at the center. Examples of duties shall include but are not limited to, assisting consumers with subscribing to low-cost internet options for their home, in-person and online troubleshooting of personal devices, research and sourcing of additional tech equipment as needed by the consumer, and collaborating with DAS and other digital inclusion service providers for coordination and exchange of information.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	500	500	500	500
Activity Scheduling	1,000	1,000	1,000	1,000
Translation Services	1,000	1,000	1,000	1,000
Social Services	1,500	1,500	1,500	1,500
Digital Navigation*	1,040	1,040	1,040	1,040
1 unit of service = 1 hour of service provision				

*1 unit of Digital Navigation = 1 hour of one-on-one or small group sessions conducted virtually or in-person at a Community Services program site, provided by staff or trained volunteers.

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Sarah Chan
Program Analyst
DAS OCP
sarah.chan@sfgov.org

and

Ella Lee
Contract Manager
HSA OCM
ella.lee@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Kimochi, Inc.					Term 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: Community services					
Budget Reference Page No.(s)					7/1/23 - 6/30/27
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	Total
Expenditures					
Salaries & Benefits	\$210,241	\$210,241	\$210,241	\$210,241	\$840,964
Operating Expenses	\$59,836	\$59,836	\$59,836	\$59,836	\$239,344
Subtotal	\$270,077	\$270,077	\$270,077	\$270,077	\$1,080,308
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$40,513	\$40,513	\$40,513	\$40,513	\$162,052
Subcontractor/Capital Expenditures					
Total Expenditures	\$310,590	\$310,590	\$310,590	\$310,590	\$1,242,360
HSA Revenues					
Community services, Local funds	\$243,315	\$243,315	\$243,315	\$243,315	\$973,260
Digital navigator, Local funds	\$67,275	\$67,275	\$67,275	\$67,275	\$269,100
TOTAL HSA REVENUES	\$310,590	\$310,590	\$310,590	\$310,590	\$1,242,360
Other Revenues					
Total Revenues	\$310,590	\$310,590	\$310,590	\$310,590	\$1,242,360
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				6/20/2018
HSA #1					

Kimochi, Inc.

Appendix B, Page 2

Program: Community services

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	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	TOTAL Budgeted Salary
Community services									
Community services program coordinator	\$53,000	1.00	100%	1.00	\$53,000	\$53,000	\$53,000	\$53,000	\$212,000
Program specialist	\$47,500	1.00	100%	1.00	\$47,500	\$47,500	\$47,500	\$47,500	\$190,000
Case manager, Japanese	\$54,080	0.30	100%	0.30	\$16,224	\$16,224	\$16,224	\$16,224	\$64,896
				-					
				-					
				-					
				-					
Digital navigator									
Program specialist- Digital navigator	\$45,000	1.00	100%	1.00	\$45,000	\$45,000	\$45,000	\$45,000	\$180,000
				-					
				-					
				-					
				-					
TOTALS	\$199,580	1.30	200%	1.30	\$161,724	\$161,724	\$161,724	\$161,724	\$646,896
FRINGE BENEFIT RATE	30.00%								
EMPLOYEE FRINGE BENEFITS	\$59,874				\$48,517	\$48,517	\$48,517	\$48,517	\$194,068
TOTAL SALARIES & BENEFITS	\$259,454				\$210,241	\$210,241	\$210,241	\$210,241	\$840,964
HSA #2									6/20/2018

Kimochi, Inc.

Program: Community services

Operating Expense Detail

<u>EXPENDITURE CATEGORY</u>	<u>TERM</u>	<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>TOTAL</u> <u>7/1/23 - 6/30/27</u>
Community services						
Rental of Property		\$43,200	\$43,200	\$43,200	\$43,200	\$172,800
Utilities(Elec, Water, Gas, Phone, Garbage)		\$3,500	\$3,500	\$3,500	\$3,500	\$14,000
Office Supplies, Postage		\$1,336	\$1,336	\$1,336	\$1,336	\$5,344
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance		\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Digital navigator						
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
Community services						
Digital navigator						
OTHER						
Community services						
Due/Subscription		\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
Computer / IT / Website		\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Telephone		\$2,800	\$2,800	\$2,800	\$2,800	\$11,200
Digital navigator						
TOTAL OPERATING EXPENSES		\$59,836	\$59,836	\$59,836	\$59,836	\$239,344
HSA #3						6/20/2018

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Kimochi, Inc.

FISCAL YEAR: 23-27

CONTRACT: Community Services

DIRECTOR: Steve Ishii

PHONE NO.: 415-931-2294

<u>SITES:</u>					
Name of Site	KIMOCHI ADMINISTRATION	KIMOCHI LOUNGE	KIMOCHI SENIOR CENTER		
Address and Zip	1715 Buchanan Street, 94115	1581 Webster Street #202 94115	1840 Sutter Street, 94115		
Phone Number	415-931-2294	415-563-5626	415-931-2287		
Fax Number	415-931-2299	415-931-2299	415-931-2299		
Neighborhood	Japantown	Japantown	Japantown		
Muni Line #s	2,3,22,38	2,3,22,38	2,3,22,38		
Person in Charge	Steve Ishii	Shawne O'Connell	Shawne O'Connell		
Site Manager	Yoshimi Higuchi	Yoshimi Higuchi	Community Services Coordinator		
Programs Offered at Site	Social Services, Translation/Interpretation, Digital Navigation	Activities, Social Services, Translation/Interpretation , Digital Navigation	Activities, Translation/Interpretation, Digital Navigation		
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00 AM – 5:00PM	10:00 AM – 2:00 PM	9:00 AM – 5:00PM		
Hours of <u>scheduled</u> programming	9:00 AM – 5:00PM	10:00 AM – 2:00 PM	1:00 PM – 4:00PM		
Total number of service days in FY	247	254	247		
Days closed	Sat,Sun, Bank Holidays	Sun, Mon, Bank Holidays	Sat,Sun, Bank 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
LIGHTHOUSE FOR THE BLIND & VISUALLY IMPAIRED

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	LIGHTHOUSE FOR THE BLIND & VISUALLY IMPAIRED
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	150	150	150	150
Activity Scheduling	720	720	720	720
Translation Services	24	24	24	24
Social Services	200	200	200	200
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Lighthouse for the Blind & Visually Impaired					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$105,557	\$105,557	\$105,557	\$105,557	\$422,228
Operating Expenses	\$419	\$419	\$419	\$419	\$1,676
Subtotal	\$105,976	\$105,976	\$105,976	\$105,976	\$423,904
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$15,896	\$15,896	\$15,896	\$15,896	\$63,584
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$121,872	\$121,872	\$121,872	\$121,872	\$487,488
DAS Revenues					
General Funds	\$121,872	\$121,872	\$121,872	\$121,872	\$487,488
Total DAS Revenue	\$121,872	\$121,872	\$121,872	\$121,872	\$487,488
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$121,872	\$121,872	\$121,872	\$121,872	\$487,488
Full Time Equivalent (FTE)	1.38	1.38	1.38	1.38	5.54
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)									
DAS Salaries & Benefits	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
Position Title	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Adult Program Coordinator #1	\$65,602	0.41	100%	0.41	\$26,897	\$26,897	\$26,897	\$26,897	\$107,588
Adult Program Coordinator #2	\$65,602	0.42	48%	0.20	\$13,351	\$13,351	\$13,351	\$13,351	\$53,404
Administrative Assistant	\$51,188	0.40	100%	0.40	\$20,475	\$20,475	\$20,475	\$20,475	\$81,900
Director, Community Services	\$136,500	0.15	100%	0.15	\$20,475	\$20,475	\$20,475	\$20,475	\$81,900
Totals	\$318,891	1.38	348%	1.16	\$81,198	\$81,198	\$81,198	\$81,198	\$324,792
Fringe Benefits Rate	30%								
Employee Fringe Benefits	\$95,667				\$24,359	\$24,359	\$24,359	\$24,359	\$97,436
Total DAS Salaries and Benefits	\$414,558				\$105,557	\$105,557	\$105,557	\$105,557	\$422,228
HSA #2									

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance	\$419	\$419	\$419	\$419	\$1,676
Staff Training					
Staff Travel					
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
Total DAS Operating Expenses	\$419	\$419	\$419	\$419	\$1,676

HSA #3

APPENDIX F - SITE CHART

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

AGENCY: Lighthouse for the Blind and Visually Impaired

FISCAL YEAR: 23/24 – 26/27

CONTRACT: Community Services

DIRECTOR: Scott Blanks

PHONE NO.: 415-431-1881

SITES:					
Name of Site	Lighthouse for the Blind and Visually Impaired				
Address and Zip	1155 Market Street, 10th floor San Francisco, CA 94103				
Phone Number	415-431-1881				
Fax Number	N/A				
Neighborhood	South of Market				
Muni Line #s					
Person in Charge & Site Manager	Scott Blanks				
Programs Offered at Site	Community Services; Technology Training; Volunteer; Intergenerational Programs				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00AM-5:00PM				
Hours of <u>scheduled</u> programming	9:00AM-5:00PM				
Total number of service days in FY	360				
Days closed	weekends, Federal Holidays, Christmas & NewYear’s Eve, etc.				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
MISSION NEIGHBORHOOD CENTERS

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	MISSION NEIGHBORHOOD CENTERS
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Grantee will provide digital navigators who will be responsible for digital literacy training, tech support of personal devices, and navigation of other digital inclusion resources needed by consumers. This position shall provide one-on-one or small-group technology support to consumers and be the main point of contact for questions and concerns relating to technology at the center. Examples of duties shall include but are not limited to, assisting consumers with subscribing to low-cost internet options for their home, in-person and online troubleshooting of personal devices, research and sourcing of additional tech equipment as needed by the consumer, and collaborating with DAS and other digital inclusion service providers for coordination and exchange of information.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	900	900	900	900
Activity Scheduling	1,950	1,950	1,950	1,950
Translation Services	960	960	960	960
Social Services	1,850	1,850	1,850	1,850
Digital Navigation*	1,800	1,800	1,800	1,800
1 unit of service = 1 hour of service provision				

*1 unit of Digital Navigation = 1 hour of one-on-one or small group sessions conducted virtually or in-person at a Community Services program site, provided by staff or trained volunteers.

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Sarah Chan
Program Analyst
DAS OCP
sarah.chan@sfgov.org

and

Steve Kim
Contract Manager
HSA OCM
steve.kim@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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	D	G	J	M	N
1	Appendix B, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4						
5	Name					
6	Mission Neighborhood Centers, Inc.					
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod. No. of Mod.					
9	Program: Community Services					
10	Budget Reference Page No.(s)					Total
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	\$384,062	\$384,062	\$384,062	\$384,062	\$1,536,248
14	Operating Expenses	\$146,223	\$146,223	\$146,223	\$146,223	\$584,892
15	Subtotal	\$530,285	\$530,285	\$530,285	\$530,285	\$3,860,320
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$79,543	\$79,543	\$79,543	\$79,543	\$318,172
18	Subcontractor/Capital Expenditures					
19	Total Expenditures	\$609,828	\$609,828	\$609,828	\$609,828	\$2,439,312
20	HSA Revenues					
21	General Funds	\$609,828	\$609,828	\$609,828	\$609,828	\$2,439,312
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$609,828	\$609,828	\$609,828	\$609,828	\$2,439,312
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$609,828	\$609,828	\$609,828	\$609,828	\$2,439,312
37	Full Time Equivalent (FTE)					
39	Prepared by: Aurora Alvarado					
40	HSA-CO Review Signature: _____					
41	HSA #1					

	A	B	C	D	I	J	O	P	U	V	AA	AB	AC
1	Appendix B, Page 3												
2													
3	Mission Neighborhood Centers, Inc.												
4	Program: Community Services												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11	TOTAL												
12	<u>Expenditure Category</u>	TERM	<u>7/1/23 - 6/30/24</u>	<u>7/1/25 - 6/30/26</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>						
13	Rental of the property		\$3,000	\$3,000	\$3,000	\$3,000	\$12,000						
14	Utilities (Elec, Water, Gas, Phone, Garbage)		\$25,607	\$25,607	\$25,607	\$25,607	\$102,428						
15	Office Supplies, Postage		\$3,000	\$3,000	\$3,000	\$3,000	\$12,000						
16	Building Maintenance Supplies and Repair		\$2,400	\$2,400	\$2,400	\$2,400	\$9,600						
17	Printing and Reproduction		\$900	\$900	\$900	\$900	\$3,600						
18	Insurance		\$3,330	\$3,330	\$3,330	\$3,330	\$13,320						
19	Staff Training		\$4,000	\$4,000	\$4,000	\$4,000	\$16,000						
20													
21	CONSULTANTS												
22	Nurse		\$400	\$400	\$400	\$400	\$1,600						
23	Nutritionist/Cooking Class		\$2,200	\$2,200	\$2,200	\$2,200	\$8,800						
24	Fitness Instructor		\$11,070	\$11,070	\$11,070	\$11,070	\$44,280						
25	Group Therapist		\$6,250	\$6,250	\$6,250	\$6,250	\$25,000						
26	Latin Dance Instructor		\$9,000	\$9,000	\$9,000	\$9,000	\$36,000						
27	Art Instructor		\$14,400	\$14,400	\$14,400	\$14,400	\$57,600						
28	Music Instructor		\$11,250	\$11,250	\$11,250	\$11,250	\$45,000						
29	Music Performer / DJ		\$9,500	\$9,500	\$9,500	\$9,500	\$38,000						
30													
31													
32	OTHER												
33	Fuel Maintenance & Repair		\$1,800	\$1,800	\$1,800	\$1,800	\$7,200						
34	Advertising		\$2,000	\$2,000	\$2,000	\$2,000	\$8,000						
35	Program Supplies		\$4,516	\$4,516	\$4,516	\$4,516	\$18,064						
36	Food Supplies		\$3,600	\$3,600	\$3,600	\$3,600	\$14,400						
37	Janitorial Supplies		\$3,800	\$3,800	\$3,800	\$3,800	\$15,200						
38	Stipend for Participants		\$4,000	\$4,000	\$4,000	\$4,000	\$16,000						
39	Transportation		\$11,000	\$11,000	\$11,000	\$11,000	\$44,000						
40	Educational Fieldtrips		\$7,200	\$7,200	\$7,200	\$7,200	\$28,800						
41	Recruitment & Outreach		\$2,000	\$2,000	\$2,000	\$2,000	\$8,000						
42	TOTAL OPERATING EXPENSE		\$146,223	\$146,223	\$146,223	\$146,223	\$584,892						
43													
44	HSA #3												

APPENDIX F - SITE CHART

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

AGENCY: **MISSION NEIGHBORHOOD CENTERS, INC**

FISCAL YEAR: **FY23/24 – 26/27**

CONTRACT: **Community Services**

DIRECTOR: **AURORA ALVARADO, Healthy Aging & Disability Services**

SITES: Name of Site	HEALTHY AGING & DISABILITY SERVICES	MISSION PLAZA	APARTMENTS DE LA ESPERANZA	ALCANTARA COURT APARTMENTS
Address and Zip Phone Number Neighborhood Muni Line #s Person in Charge Site Manager	362 Capp St San Francisco, CA 94110 415-206-7750 Mission District District 9 14, 49 Mission, 22 Divisadero Aurora Alvarado Aurora Alvarado	2027 Mission St San Francisco, CA 94110 415.864.2996 Mission District District 9 14,49 Mission, Inbound to Ferry Jorge Renteria Jorge Renteria	3590 19 th St San Francisco, CA 94110 415.626-5513 Mission District District 9 14, 49 Mission, Inbound to Ferry Marcia Contreras Martin Uriarte	670-672 Valencia St, San Francisco, CA 94110 415-552-8247 Mission District District 9 14, 49 Mission, 22 Divisadero Marcia Contreras Olivia Baldelomar
Programs Offered at Site	Program Offerings: Community and Social Services Program; Aging & Disability Resource Center. Activities: Nutrition Cooking class, health & wellness workshops; Psychoeducation, technology & digital literacy; Exercises and fitness; recreational & socialization activities.	Program Offerings: Community and Social Services Program; Aging & Disability Resource Center. Psychoeducation, technology & digital literacy; Exercises and fitness; activities.	Program Offerings: Community and Social Services Program; Aging & Disability Resource Center. Psychoeducation, technology & digital literacy; Exercises and fitness; activities.	Program Offerings: Community and Social Services Program; Aging & Disability Resource Center. Psychoeducation, technology & digital literacy; Exercises and fitness; activities.
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00 am – 5:00 pm	9 am – 5:00 pm	9:00 am – 5:00 pm	9:00 am – 5:00 pm
Hours of <u>scheduled</u> programming	9:00am – 12:30pm 1:00pm - 5:00pm	10:00am – 4:00 pm	10:00am – 4:00 pm	10:00am – 4:00 pm
Total number of service days in FY	300	52	52	52
Days closed	New Year’s, Martin Luther King, Presidents Day, Cesar Chavez, Memorial Day, Juneteenth, 4 th of July, Labor Day, Veterans Day, Thanksgiving, Day after Thanksgiving, Christmas.	New Year’s, Martin Luther King, Presidents Day, Cesar Chavez, Memorial Day, Juneteenth, 4 th of July, Labor Day, Veterans Day, Thanksgiving, Day after Thanksgiving, Christmas.	New Year’s, Martin Luther King, Presidents Day, Cesar Chavez, Memorial Day, Juneteenth, 4 th of July, Labor Day, Veterans Day, Thanksgiving, Day after Thanksgiving, Christmas.	New Year’s, Martin Luther King, Presidents Day, Cesar Chavez, Memorial Day, Juneteenth, 4 th of July, Labor Day, Veterans Day, Thanksgiving, Day after Thanksgiving, Christmas.
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

Appendix A - Services to be Provided
ON LOK DAY SERVICES – 30th St. SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	ON LOK DAY SERVICES
Higher Learning Classes	College-level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco's Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.

Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational,

and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:

- i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
 - ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are

contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Higher Learning classes will be offered at 30th Street Senior Center / On-Lok. These classes will be open to any older adult or adult with disabilities interested. A participant will register for class(es) as a separate program of the community service center. Course topic is "Body Dynamics." These classes are college level classes taught by instructors with advanced degrees and teaching experience in the field of study.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	1,550	1,550	1,550	1,550
Activity Scheduling	4,800	4,800	4,800	4,800
Translation Services	1,000	1,000	1,000	1,000
Social Services	2,500	2,500	2,500	2,500
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

Higher Learning

1. Class participants report that the course increased their socialization opportunities and interaction with others. Target: 80%

2. Class participants report an increase in knowledge of the Higher Learning course topic. Target: 80%

Based on a satisfaction survey created by the grantee with input from DAS OCP and with a sample size of at least 75% of the participants enrolled in the class.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.

13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name					Term
On-Lok Day Services					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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$328,485	\$328,485	\$328,485	\$328,485	\$1,313,940
Operating Expenses	\$106,302	\$106,302	\$106,302	\$106,302	\$425,208
Subtotal	\$434,787	\$434,787	\$434,787	\$434,787	\$1,739,148
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$65,218	\$65,218	\$65,218	\$65,218	\$260,872
Capital/Subcontractor Expenditures	\$35,460	\$35,460	\$35,460	\$35,460	\$141,840
Total DAS Expenditures	\$535,465	\$535,465	\$535,465	\$535,465	\$2,141,860
DAS Revenues					
General Funds	\$535,465	\$535,465	\$535,465	\$535,465	\$2,141,860
Total DAS Revenue	\$535,465	\$535,465	\$535,465	\$535,465	\$2,141,860
Non DAS Revenues					
Volunteers	\$10,842	\$10,842	\$10,842	\$10,842	\$43,368
Agency Cash - Fundraising	\$431,083	\$431,083	\$431,083	\$431,083	\$1,724,332
Total Non DAS Revenue	\$441,925	\$441,925	\$441,925	\$441,925	\$1,767,700
TOTAL DAS AND NON DAS REVENUE	\$977,390	\$977,390	\$977,390	\$977,390	\$3,909,560
Full Time Equivalent (FTE)	6.48	6.48	6.48	6.48	25.92
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)

DAS Salaries & Benefits	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	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Director	\$142,533	0.15	20%	0.03	\$4,276	\$4,276	\$4,276	\$4,276	\$17,104
Assistant Director	\$114,022	0.40	20%	0.08	\$9,122	\$9,122	\$9,122	\$9,122	\$36,488
Accountant	\$79,043	0.40	60%	0.24	\$18,970	\$18,970	\$18,970	\$18,970	\$75,880
Snr Ctr Program Mgr - Activities	\$82,634	1.00	45%	0.45	\$37,185	\$37,185	\$37,185	\$37,185	\$148,740
Snr Ctr Program Mgr - Volunteer	\$87,437	0.70	45%	0.32	\$27,543	\$27,543	\$27,543	\$27,543	\$110,172
Snr Ctr Operations Mgr	\$85,317	0.43	45%	0.19	\$16,509	\$16,509	\$16,509	\$16,509	\$66,036
Administrative Assistant	\$70,412	0.40	60%	0.24	\$16,899	\$16,899	\$16,899	\$16,899	\$67,596
Snr Ctr Operations Coord	\$67,167	1.00	65%	0.65	\$43,659	\$43,659	\$43,659	\$43,659	\$174,636
Snr Ctr Operations Coord	\$61,976	1.00	65%	0.65	\$40,284	\$40,284	\$40,284	\$40,284	\$161,136
Snr Ctr Prog Coord- Community Services	\$64,896	1.00	65%	0.65	\$42,182	\$42,182	\$42,182	\$42,182	\$168,728
Totals	\$855,437	6.48	490%	3.50	\$256,629	\$256,629	\$256,629	\$256,629	\$1,026,516
Fringe Benefits Rate	28%								
Employee Fringe Benefits	\$239,522				\$71,856	\$71,856	\$71,856	\$71,856	\$287,424
Total DAS Salaries and Benefits	\$1,094,959				\$328,485	\$328,485	\$328,485	\$328,485	\$1,313,940

HSA #2

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$28,012	\$28,012	\$28,012	\$28,012	\$112,048
Office Supplies, Postage	\$2,500	\$2,500	\$2,500	\$2,500	\$10,000
Building Maintenance Supplies and Repair	\$60,000	\$60,000	\$60,000	\$60,000	\$240,000
Printing and Reproduction	\$750	\$750	\$750	\$750	\$3,000
Insurance	\$3,150	\$3,150	\$3,150	\$3,150	\$12,600
Staff Training	\$350	\$350	\$350	\$350	\$1,400
Staff Travel					
Rental of Equipment	\$1,100	\$1,100	\$1,100	\$1,100	\$4,400
<u>Consultants</u>					
<u>Other</u>					
Senior Support Group	\$7,920	\$7,920	\$7,920	\$7,920	\$31,680
Program Supplies	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Payroll Processing	\$250	\$250	\$250	\$250	\$1,000
Recruiting Fee	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Software and Subscription	\$270	\$270	\$270	\$270	\$1,080
Total DAS Operating Expenses	\$106,302	\$106,302	\$106,302	\$106,302	\$425,208

HSA #3

Capital & Subcontractor Expenditure Detail

DAS Capital Expenditure	(Total)				
<u>Equipment (Qty)</u>	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
Total Equipment Cost					
<u>Remodeling</u>	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
Total Remodeling Cost					
<u>Subcontractor</u>	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
Body Dynamics Class	\$24,300	\$24,300	\$24,300	\$24,300	\$97,200
Art Class	\$7,200	\$7,200	\$7,200	\$7,200	\$28,800
Yoga Class	\$3,960	\$3,960	\$3,960	\$3,960	\$15,840
Total Subcontractor Cost	\$35,460	\$35,460	\$35,460	\$35,460	\$141,840
Total DAS Capital & Subcontractor Expenditure	\$35,460	\$35,460	\$35,460	\$35,460	\$141,840
HSA #4					

APPENDIX F - SITE CHART

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

AGENCY: On-Lok Day Services

FISCAL YEAR: 23/24 – 26/27

CONTRACT: Community Services

DIRECTOR: Sandra Rivas

PHONE NO.: 415-550-2210

SITES:					
Name of Site	On Lok 30th Street Senior Center				
Address and Zip	225 30 th Street San Francisco, CA 94110				
Phone Number	415-510-2210				
Fax Number	415-550-2255				
Neighborhood	Upper Noe Valley				
Muni Line #s	24,36,14,49,J,Church				
Person in Charge & Site Manager	Sandra Rivas/Vicky Palacios				
Programs Offered at Site	ADRC, Case Management, Community Services, Health Promotion, Congregate, HDM				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	Mon-Sat: 8:30am-5pm Holidays: 8:30am-2:30pm				
Hours of <u>scheduled</u> programming	Mon-Sat: 9am-4pm Holidays: 9am-2pm				
Days closed	Sunday				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided

OPENHOUSE

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	OPENHOUSE
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
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SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	500	500	500	500
Activity Scheduling	1,400	1,400	1,400	1,400
Translation Services	45	45	45	45
Social Services	1,500	1,500	1,500	1,500
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Steve Kim
Contract Manager
HSA OCM
steve.kim@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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		Term			
6	Openhouse		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> X_ Renewal ___ Modification ___					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community 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
12	Expenditures					
13	Salaries & Benefits	\$570,800	\$570,800	\$570,800	\$570,800	\$2,283,200
14	Operating Expenses	\$38,000	\$38,000	\$38,000	\$38,000	\$152,000
15	Subtotal	\$608,800	\$608,800	\$608,800	\$608,800	\$2,435,200
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$91,320	\$91,320	\$91,320	\$91,320	\$365,280
18	Subcontractor/Capital Expenditures	\$39,000	\$39,000	\$39,000	\$39,000	\$156,000
19	Total Expenditures	\$739,120	\$739,120	\$739,120	\$739,120	\$2,956,480
20	HSA Revenues					
21	General Funds	\$739,120	\$739,120	\$739,120	\$739,120	\$2,956,480
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$739,120	\$739,120	\$739,120	\$739,120	\$2,956,480
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$739,120	\$739,120	\$739,120	\$739,120	\$2,956,480
37	Full Time Equivalent (FTE)					
39	Prepared by: Matthew Cimino		Telephone No.: 415-530-2783			
40	HSA-CO Review Signature: _____					
41	HSA #1					

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3	Openhouse												
4	Program: Community Services												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													TOTAL
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>	<u>7/1/23 - 6/30/27</u>				
13	Rental of Property				_____	_____	_____	_____	_____				
14	Utilities(Elec, Water, Gas, Phone, Garbage)				_____	_____	_____	_____	_____				
15	Office Supplies, Postage				_____	_____	_____	_____	_____				
16	Building Maintenance Supplies and Repair				_____	_____	_____	_____	_____				
17	Printing and Reproduction				\$38,000	\$38,000	\$38,000	\$38,000	\$152,000				
18	Insurance				_____	_____	_____	_____	_____				
19	Staff Training				_____	_____	_____	_____	_____				
20	Staff Travel-(Local & Out of Town)				_____	_____	_____	_____	_____				
21	Rental of Equipment				_____	_____	_____	_____	_____				
22					_____	_____	_____	_____	_____				
23	CONSULTANTS												
24					_____	_____	_____	_____	_____				
25					_____	_____	_____	_____	_____				
26					_____	_____	_____	_____	_____				
27	OTHER												
28					_____	_____	_____	_____	_____				
29					_____	_____	_____	_____	_____				
30					_____	_____	_____	_____	_____				
31	TOTAL OPERATING EXPENSE				\$38,000	\$38,000	\$38,000	\$38,000	\$152,000				
32													
33	HSA #3												

	A	B	C	D	E	F	G	
1							Appendix B, Page 4	
2								
3		Openhouse						
4		Program: Community Services						
5								
6								
7								
8		Capital Expenditures						
9								
10		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	7/1/23 - 6/30/27	
11		Mon Ami	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000	
12		Shanti	\$15,000	\$15,000	\$15,000	\$15,000	\$60,000	
13							\$0	
14							\$0	
15							\$0	
16		TOTAL SUBCONTRACTOR COST	\$39,000	\$39,000	\$39,000	\$39,000	\$156,000	
17								
18								
19		EQUIPMENT	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
20	Units	ITEM/DESCRIPTION						
21								
22								
23								
24								
25		TOTAL EQUIPMENT COST						
26								
27		OTHER	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	
28		Description:						
29		Remodel A						
30								
31								
32		TOTAL REMODELING COST						
33								
34		TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE	\$39,000	\$39,000	\$39,000	\$39,000	\$156,000	
35								
36		HSA #4						

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: **OPENHOUSE**

FISCAL YEAR: 2023-2027

CONTRACT MAILING ADDRESS: 65 Laguna Street, San Francisco, CA 94102

DIRECTOR: Kathleen Sullivan, Ph.D.

PHONE NO.: 415.728.0197

<p><u>SITES:</u> (Community Services)</p> <p>Name of Site</p>	<p>Main Office: Openhouse at the Bob Ross LGBT Senior Center</p>	<p>Openhouse Community Center: Morton B. Blatt and Peter G. Holmstrom LGBTQ+ Senior Community Center</p>			
<p>Address and Zip</p> <p>Phone Number</p> <p>Fax Number</p> <p>Neighborhood</p> <p>Muni Line #s</p> <p>Person in Charge</p> <p>Site Manager</p>	<p>65 Laguna Street, 94102</p> <p>415-296-8995</p> <p>415-296-8008</p> <p>Hayes Valley/Castro, D8</p> <p>F, 6, 7, 14, 22, 49</p> <p>Kathleen Sullivan, Ph.D. (she/her) Executive Director</p> <p>Charity Horst (she/her) Operations Manager</p>	<p>75 Laguna Street, 94102</p> <p>415-296-8995</p> <p>415-296-8008</p> <p>Hayes Valley/Castro, D8</p> <p>F, 6, 7, 14, 22, 49</p> <p>Kathleen Sullivan, Ph.D. (she/her) Executive Director</p> <p>Charity Horst (she/her) Operations Manager</p>			

Programs Offered at Site	Case Management; ADRC; Health & Wellness	DAS Community Services; Community Day Services (Club 75); Lifelong Learning; Community Engagement; Friendly Visitor; Volunteer Services; Drag Bingo; Rainbow Lunch			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8 hours M-F	8 hours M-F, 6 hours Sat.			
Hours of <u>scheduled</u> programming	9:30AM-5:30PM, M-F	9:30AM-5:30PM, M-F 10:00 AM – 4:00 PM, Sat.			
Days closed	120	120			
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
RUSSIAN AMERICAN COMMUNITY SERVICES

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	RUSSIAN AMERICAN COMMUNITY SERVICES
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise

classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	350	350	350	350
Activity Scheduling	582	582	582	582
Translation Services	250	250	250	250
Social Services	2,000	2,000	2,000	2,000
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Tara Alvarez
Contract Manager
HSA OCM
tara.alvarez@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on

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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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		Term			
6	Russian American Community Services		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community 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	Total
12	Expenditures					
13	Salaries & Benefits	\$81,050	\$81,050	\$81,050	\$81,050	\$324,200
14	Operating Expenses	\$15,566	\$15,566	\$15,566	\$15,566	\$62,264
15	Subtotal	\$96,616	\$96,616	\$96,616	\$96,616	\$386,464
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$14,492	\$14,492	\$14,492	\$14,492	\$57,970
19	Total Expenditures	\$111,109	\$111,109	\$111,109	\$111,109	\$444,436
20	HSA Revenues					
21	Local Funds	\$111,109	\$111,109	\$111,109	\$111,109	\$444,436
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$111,109	\$111,109	\$111,109	\$111,109	\$444,436
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$111,109	\$111,109	\$111,109	\$111,109	\$444,436
37	Full Time Equivalent (FTE)					
39	Prepared by: Olga Medvedko		Telephone No.: 415-387-5336			
40	HSA-CO Review Signature: _____					
41	HSA #1					6/23/2023

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	Russian American Community Services												
4	Program: Community Services												
5													
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												\$ -
14	Utilities(Elec, Water, Gas, Phone, Garbage)		\$3,600	\$3,600	\$3,600	\$3,600							\$ 14,400
15	Office Supplies, Postage		\$1,000	\$1,000	\$1,000	\$1,000							\$ 4,000
16	Building Maintenance Supplies and Repair		\$900	\$900	\$900	\$900							\$ 3,600
17	Printing and Reproduction		\$1,200	\$1,200	\$1,200	\$1,200							\$ 4,800
18	Insurance		\$1,400	\$1,400	\$1,400	\$1,400							\$ 5,600
19	Staff Training												\$ -
20	Staff Travel-(Local & Out of Town)												\$ -
21	Rental of Equipment												\$ -
22													
23	CONSULTANTS												
24	Performers, Speakers		\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000							\$ 12,000
25	Community outreach coordinator		\$ 3,600	\$ 3,600	\$ 3,600	\$ 3,600							\$ 14,400
26													
27	OTHER												
28	Volunteer appreciation												\$ -
29	Festivity supplies, cultural food		\$ 866	\$ 866	\$ 866	\$ 866							\$ 3,464
30													\$ -
31													
32	TOTAL OPERATING EXPENSE		\$ 15,566	\$ 15,566	\$ 15,566	\$ 15,566							\$ 62,264
33													
34	HSA #3												6/23/2023

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Russian American Community Services

FISCAL YEAR: 2023-2027

CONTRACT MAILING ADDRESS: 300 Anza Street, San Francisco, CA 94118

DIRECTOR: Olga Medvedko

PHONE NO.: 415-387-5336

<u>SITES:</u> (Community Services)					
Name of Site	RACS				
Address and Zip	300 Anza St, 94118				
Phone Number	415-387-5336				
Neighborhood					
Muni Line #s	Richmond				
Person in Charge	38				
Site Manager	Olga Medvedko				
Programs Offered at Site	ESL classes, Social Services, Translations, Activities around lunch time				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9 am-5 pm				
Hours of <u>scheduled</u> programming	10:00 am -5 pm				
Days closed	NY Day, January 7th, President's Day, Bright Monday, Memorial Day, July 4th, Labor Day, Thanksgiving (2 days), December 25th				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
SELF-HELP FOR THE ELDERLY – JACKIE CHAN SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	SELF-HELP FOR THE ELDERLY
Higher Learning Classes	College-level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco's Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.

Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational,

and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:

- i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
 - ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are

contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Higher Learning classes will be offered at Self-Help for the Elderly Senior Centers. These classes will be open to any older adult or adult with disabilities interested. A participant will register for class(es) as a separate program of the community service center. Course topics are “Nutrition Education” and “Tai Chi.” These classes are college level classes taught by instructors with advanced degrees and teaching experience in the field of study.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	250	250	250	250
Activity Scheduling	1,150	1,150	1,150	1,150
Translation Services	300	300	300	300
Social Services	350	350	350	350
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

Higher Learning

1. Class participants report that the course increased their socialization opportunities and interaction with others. Target: 80%

2. Class participants report an increase in knowledge of the Higher Learning course topic. Target: 80%

Based on a satisfaction survey created by the grantee with input from DAS OCP and with a sample size of at least 75% of the participants enrolled in the class.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.

13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Tahir Shaikh
Contract Manager
HSA OCM
tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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						7/5/2023
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name			Term		
6	SELF-HELP FOR THE ELDERLY			7/1/23 - 6/30/27		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod. No. of Mod.					
9	Program: Community Service-District 1-Jackie Chan Senior Center					
10	Budget Reference Page No.(s)					Total
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	\$73,239	\$73,239	\$73,239	\$73,239	\$292,956
14	Operating Expenses	\$26,324	\$26,324	\$26,324	\$26,324	\$105,296
15	Subtotal	\$99,563	\$99,563	\$99,563	\$99,563	\$398,252
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$14,935	\$14,935	\$14,935	\$14,935	\$59,740
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$114,498	\$114,498	\$114,498	\$114,498	\$457,992
20	HSA Revenues					
21	General Fund	\$114,498	\$114,498	\$114,498	\$114,498	\$457,992
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$114,498	\$114,498	\$114,498	\$114,498	\$457,992
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$114,498	\$114,498	\$114,498	\$114,498	\$457,992
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair		Telephone No.: 415-677-7682			
40	HSA-CO Review Signature: _____					
41	HSA #1					12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													Date: 7/5/23
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 1-Jackie Chan Senior Center												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	Expenditure Category			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
13	Rental of Property				\$14,097	\$14,097	\$14,097	\$14,097	\$14,097				\$56,388
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$5,000	\$5,000	\$5,000	\$5,000	\$5,000				\$20,000
15	Office Supplies, Postage				\$328	\$328	\$328	\$328	\$328				\$1,310
16	Building Maintenance Supplies and Repair				\$541	\$541	\$541	\$541	\$541				\$2,164
17	Printing and Reproduction				\$150	\$150	\$150	\$150	\$150				\$600
18	Insurance				\$750	\$750	\$750	\$750	\$750				\$3,000
19	Staff Training				\$100	\$100	\$100	\$100	\$100				\$400
20	Staff Travel-(Local & Out of Town)				\$100	\$100	\$100	\$100	\$100				\$400
21	Rental of Equipment				\$150	\$150	\$150	\$150	\$150				\$600
22													
23	CONSULTANTS												
24	Professional Fees-Instructor				\$3,383	\$3,383	\$3,383	\$3,383	\$3,383				\$13,532
25													\$0
26													
27	OTHER												
28	Program Expenses				\$1,000	\$1,000	\$1,000	\$1,000	\$1,000				\$4,000
29	Communications				\$650	\$650	\$650	\$650	\$650				\$2,600
30	Recruitment Expenses				\$75	\$75	\$75	\$75	\$75				\$300
31													
32													\$0
33													
34	TOTAL OPERATING EXPENSE				\$26,324	\$26,324	\$26,324	\$26,324	\$26,324				\$105,296
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 1 Site Chart
1 of 1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677-7607

<u>SITES:</u> (Community Services)	Jackie Chan Senior Center				
Name of Site					
Address and Zip	5757 Geary Blvd, S.F., CA 94121				
Phone Number	415-677-7571				
Fax Number					
Neighborhood	Richmond				
Muni Line#s	Muni 38, 38AX, 38BX, 38R, 29				
Person in Charge	Lance Ma				
Site Manager	Amy Huang				
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 5:00 pm Sat 9:00 am – 2:00 pm				
Hours of <u>scheduled</u> programming	M – F 9:00 am – 5:00 pm Sat 9:00 am – 2:00 pm				
Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
SELF-HELP FOR THE ELDERLY - GEEN MUN SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

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CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
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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	SELF-HELP FOR THE ELDERLY
Higher Learning Classes	College-level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco's Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.

Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational,

and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:

- i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
 - ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are

contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Higher Learning classes will be offered at Self-Help for the Elderly Senior Centers. These classes will be open to any older adult or adult with disabilities interested. A participant will register for class(es) as a separate program of the community service center. Course topics are “Nutrition Education” and “Tai Chi.” These classes are college level classes taught by instructors with advanced degrees and teaching experience in the field of study.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	300	300	300	300
Activity Scheduling	1,200	1,200	1,200	1,200
Translation Services	300	300	300	300
Social Services	350	350	350	350
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

Higher Learning

1. Class participants report that the course increased their socialization opportunities and interaction with others. Target: 80%

2. Class participants report an increase in knowledge of the Higher Learning course topic. Target: 80%

Based on a satisfaction survey created by the grantee with input from DAS OCP and with a sample size of at least 75% of the participants enrolled in the class.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
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 - Number and type of service units provided
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6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
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10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.

13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Tahir Shaikh
Contract Manager
HSA OCM
tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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						Date: 7/5/2023
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name			Term		
6	SELF-HELP FOR THE ELDERLY			7/1/23 - 6/30/27		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod. No. of Mod.					
9	Program: Community Service-District 3-Geen Mun SC					
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	Total
12	Expenditures					
13	Salaries & Benefits	\$69,226	\$69,226	\$69,226	\$69,226	\$276,904
14	Operating Expenses	\$33,958	\$33,958	\$33,958	\$33,958	\$135,832
15	Subtotal	\$103,184	\$103,184	\$103,184	\$103,184	\$412,736
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$15,478	\$15,478	\$15,478	\$15,478	\$61,912
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$118,661	\$118,661	\$118,661	\$118,661	\$474,644
20	HSA Revenues					
21	General Fund	\$118,661	\$118,661	\$118,661	\$118,661	\$474,644
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$118,661	\$118,661	\$118,661	\$118,661	\$474,644
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$118,661	\$118,661	\$118,661	\$118,661	\$474,644
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair		Telephone No.: 415-677-7682			
40	HSA-CO Review Signature: _____					
41	HSA #1					12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													Date: 7/5/23
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 3-Geen Mun SC												
5													
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				\$18,360	\$18,360	\$18,360	\$18,360					\$73,440
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$10,973	\$10,973	\$10,973	\$10,973					\$43,890
15	Office Supplies, Postage				\$50	\$50	\$50	\$50					\$200
16	Building Maintenance Supplies and Repair				\$50	\$50	\$50	\$50					\$200
17	Printing and Reproduction				\$50	\$50	\$50	\$50					\$200
18	Insurance				\$650	\$650	\$650	\$650					\$2,600
19	Staff Training				\$0	\$0	\$0	\$0					\$0
20	Staff Travel-(Local & Out of Town)				\$0	\$0	\$0	\$0					\$0
21	Rental of Equipment				\$100	\$100	\$100	\$100					\$400
22													
23	CONSULTANTS												
24	Professional Fees-Instructor				\$2,000	\$2,000	\$2,000	\$2,000					\$8,000
25													
26													
27	OTHER												
28	Program Expenses				\$1,000	\$1,000	\$1,000	\$1,000					\$4,000
29	Communications				\$650	\$650	\$650	\$650					\$2,600
30	Recruitment Expenses				\$75	\$75	\$75	\$75					\$300
31													
32													\$0
33													
34	TOTAL OPERATING EXPENSE				<u>\$33,958</u>	<u>\$33,958</u>	<u>\$33,958</u>	<u>\$33,958</u>					\$135,830
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 3 Site Chart
1 of 1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677-7607

<u>SITES:</u> (Community Services)	Geen Mun Senior Center	Lady Shaw Senior Center	Manilatown Senior Center		
Name of Site					
Address and Zip	777 Stockton Street, S.F., CA94108	1483 Mason Street, S.F., CA94133	848 Keamy Street, S.F., CA94108		
Phone Number	415-391-3843	415-677-7581	415-398-3250		
Fax Number					
Neighborhood	Chinatown	Chinatown	Chinatown		
Muni Line#s	1, 8, 8AX, 8BX, 12, 30, 45, T	1, 8, 8AX, 8BX, 12, 30, 45, T	1, 8, 8AX, 8BX, 12, 30, 45, T		
Person in Charge	Lance Ma	Lance Ma	Lance Ma		
Site Manager	Vicky Kwong	Yana He	Ada Ma		
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education	Congregate Meals/HDM Community/Social Service Nutrition Education	Congregate Meals/HDM Community/Social Service Nutrition Education		
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 5:00 pm Sat 9:00 am – 2:00 pm	M – F 9:00 am – 5:00 pm	M – F 9:00 am – 2:00 pm		
Hours of <u>scheduled</u> programming	M – F 9:00 am – 5:00 pm Sat 9:00 am – 2:00 pm	M – F 9:00 am – 5:00 pm	M – F 9:00 am – 2:00 pm		
Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
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
SELF-HELP FOR THE ELDERLY - LADY SHAW SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	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.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
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SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
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Socially Isolated	Having few social relationships and few people to interact with regularly.
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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:

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Translation Services	270	270	270	270
Social Services	330	330	330	330
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

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 - Number and type of service units provided
4. Monthly, quarterly, and annual reports must be entered into the Contracts

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Program Analyst
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reanna.albert@sfgov.org

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Tahir Shaikh
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tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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						7/5/2023
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name		Term			
6	SELF-HELP FOR THE ELDERLY		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Service-District 3-Lady Shaw SC					
10	Budget Reference Page No.(s)					Total
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	\$66,417	\$66,417	\$66,417	\$66,417	\$265,668
14	Operating Expenses	\$5,375	\$5,375	\$5,375	\$5,375	\$21,500
15	Subtotal	\$71,792	\$71,792	\$71,792	\$71,792	\$287,168
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$10,767.83	\$10,767.83	\$10,767.83	\$10,767.83	\$43,072
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$82,560	\$82,560	\$82,560	\$82,560	\$330,240
20	HSA Revenues					
21	General Fund	\$82,560	\$82,560	\$82,560	\$82,560	\$330,240
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$82,560	\$82,560	\$82,560	\$82,560	\$330,240
30	Other Revenues					
31						
32	In-Kind Match-Lady Shaw Rent	25,000	25,000	25,000	25,000	\$100,000
33						
34						
35						
36	Total Revenues	\$107,560	\$107,560	\$107,560	\$107,560	\$430,240
37	Full Time Equivalent (FTE)					
39	Prepared by:	Leny Nair	Telephone No.:	415-677-7682		
40	HSA-CO Review Signature:	_____				
41	HSA #1					12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													Date: 7/5/23
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 3-Lady Shaw SC												
5													
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 7/1/23 - 6/30/27
13	Rental of Property												
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
15	Office Supplies, Postage				\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$600
16	Building Maintenance Supplies and Repair				\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$1,000
17	Printing and Reproduction				\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$50	\$200
18	Insurance				\$650	\$650	\$650	\$650	\$650	\$650	\$650	\$650	\$2,600
19	Staff Training				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
20	Staff Travel-(Local & Out of Town)				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21	Rental of Equipment				\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$1,000
22													
23	CONSULTANTS												
24	Professional Fees-Instructor				\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
25													\$0
26													
27	OTHER												
28	Program Expenses				\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
29	Communications				\$450	\$450	\$450	\$450	\$450	\$450	\$450	\$450	\$1,800
30	Recruitment Expenses				\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$300
31													
32													\$0
33													
34	TOTAL OPERATING EXPENSE				<u>\$5,375</u>	<u>\$5,375</u>	<u>\$5,375</u>	<u>\$5,375</u>	<u>\$5,375</u>	<u>\$5,375</u>	<u>\$5,375</u>	<u>\$5,375</u>	\$21,500
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 3 Site Chart
1 of 1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677-7607

<u>SITES:</u> (Community Services)	Geen Mun Senior Center	Lady Shaw Senior Center	Manilatown Senior Center		
Name of Site					
Address and Zip	777 Stockton Street, S.F., CA94108	1483 Mason Street, S.F., CA94133	848 Keamy Street, S.F., CA94108		
Phone Number	415-391-3843	415-677-7581	415-398-3250		
Fax Number					
Neighborhood	Chinatown	Chinatown	Chinatown		
Muni Line#s	1, 8, 8AX, 8BX, 12, 30, 45, T	1, 8, 8AX, 8BX, 12, 30, 45, T	1, 8, 8AX, 8BX, 12, 30, 45, T		
Person in Charge	Lance Ma	Lance Ma	Lance Ma		
Site Manager	Vicky Kwong	Yana He	Ada Ma		
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education	Congregate Meals/HDM Community/Social Service Nutrition Education	Congregate Meals/HDM Community/Social Service Nutrition Education		
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 5:00 pm Sat 9:00 am – 2:00 pm	M – F 9:00 am – 5:00 pm	M – F 9:00 am – 2:00 pm		
Hours of <u>scheduled</u> programming	M – F 9:00 am – 5:00 pm Sat 9:00 am – 2:00 pm	M – F 9:00 am – 5:00 pm	M – F 9:00 am – 2:00 pm		
Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
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
SELF-HELP FOR THE ELDERLY - MANILATOWN SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	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.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	150	150	150	150
Activity Scheduling	900	900	900	900
Translation Services	240	240	240	240
Social Services	300	300	300	300
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Tahir Shaikh
Contract Manager
HSA OCM
tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

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1						Appendix B, Page 1
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4	BY PROGRAM					
5	Name			Term		
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8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Service-District 3-Manilatown SC					
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	Total
12	Expenditures					
13	Salaries & Benefits	\$69,226	\$69,226	\$69,226	\$69,226	\$276,904
14	Operating Expenses	\$11,675	\$11,675	\$11,675	\$11,675	\$46,700
15	Subtotal	\$80,901	\$80,901	\$80,901	\$80,901	\$323,604
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$12,135	\$12,135	\$12,135	\$12,135	\$48,540
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$93,037	\$93,037	\$93,037	\$93,037	\$372,148
20	HSA Revenues					
21	General Fund	\$93,037	\$93,037	\$93,037	\$93,037	\$372,148
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$93,037	\$93,037	\$93,037	\$93,037	\$372,148
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$93,037	\$93,037	\$93,037	\$93,037	\$372,144
37	Full Time Equivalent (FTE)					
39	Prepared by:	Leny Nair	Telephone No.:	415-677-7682		
40	HSA-CO Review Signature: _____					
41	HSA #1					12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													Date: 7/5/23
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 3-Manilatown SC												
5													
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
13	Rental of Property				\$4,950	\$4,950	\$4,950	\$4,950					\$19,800
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$1,500	\$1,500	\$1,500	\$1,500					\$6,000
15	Office Supplies, Postage				\$300	\$300	\$300	\$300					\$1,200
16	Building Maintenance Supplies and Repair				\$500	\$500	\$500	\$500					\$2,000
17	Printing and Reproduction				\$150	\$150	\$150	\$150					\$600
18	Insurance				\$750	\$750	\$750	\$750					\$3,000
19	Staff Training				\$100	\$100	\$100	\$100					\$400
20	Staff Travel-(Local & Out of Town)				\$100	\$100	\$100	\$100					\$400
21	Rental of Equipment				\$450	\$450	\$450	\$450					\$1,800
22													
23	CONSULTANTS												
24	Professional Fees-Instructor				\$1,000	\$1,000	\$1,000	\$1,000					\$4,000
25													
26													
27	OTHER												
28	Program Expenses				\$1,000	\$1,000	\$1,000	\$1,000					\$4,000
29	Communications				\$650	\$650	\$650	\$650					\$2,600
30	Recruitment Expenses				\$225	\$225	\$225	\$225					\$900
31													
32													\$0
33													
34	TOTAL OPERATING EXPENSE				\$11,675	\$11,675	\$11,675	\$11,675					\$46,700
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 3 Site Chart
1 of 1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677-7607

<u>SITES:</u> (Community Services)	Geen Mun Senior Center	Lady Shaw Senior Center	Manilatown Senior Center		
Name of Site					
Address and Zip	777 Stockton Street, S.F., CA94108	1483 Mason Street, S.F., CA94133	848 Keamy Street, S.F., CA94108		
Phone Number	415-391-3843	415-677-7581	415-398-3250		
Fax Number					
Neighborhood	Chinatown	Chinatown	Chinatown		
Muni Line#s	1, 8, 8AX, 8BX, 12, 30, 45, T	1, 8, 8AX, 8BX, 12, 30, 45, T	1, 8, 8AX, 8BX, 12, 30, 45, T		
Person in Charge	Lance Ma	Lance Ma	Lance Ma		
Site Manager	Vicky Kwong	Yana He	Ada Ma		
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education	Congregate Meals/HDM Community/Social Service Nutrition Education	Congregate Meals/HDM Community/Social Service Nutrition Education		
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 5:00 pm Sat 9:00 am – 2:00 pm	M – F 9:00 am – 5:00 pm	M – F 9:00 am – 2:00 pm		
Hours of <u>scheduled</u> programming	M – F 9:00 am – 5:00 pm Sat 9:00 am – 2:00 pm	M – F 9:00 am – 5:00 pm	M – F 9:00 am – 2:00 pm		
Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
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
SELF-HELP FOR THE ELDERLY - SOUTH SUNSET SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	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.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	400	400	400	400
Activity Scheduling	1,000	1,000	1,000	1,000
Translation Services	260	260	260	260
Social Services	320	320	320	320
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Tahir Shaikh
Contract Manager
HSA OCM
tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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						7/5/2023
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name		Term			
6	SELF-HELP FOR THE ELDERLY		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Service-District 4-South Sunset SC					
10	Budget Reference Page No.(s)					Total
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	\$72,755	\$72,755	\$72,755	\$72,755	\$291,022
14	Operating Expenses	\$13,237	\$13,237	\$13,237	\$13,237	\$52,948
15	Subtotal	\$85,992	\$85,992	\$85,992	\$85,992	\$343,970
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$12,899	\$12,899	\$12,899	\$12,899	\$51,595
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$98,891	\$98,891	\$98,891	\$98,891	\$395,564
20	HSA Revenues					
21	Local Funds	\$98,891	\$98,891	\$98,891	\$98,891	\$395,565
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$98,891	\$98,891	\$98,891	\$98,891	\$395,564
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$98,891	\$98,891	\$98,891	\$98,891	\$395,564
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair	Telephone No.: 415-677-7682				
40	HSA-CO Review Signature:	_____				
41	HSA #1	12/2/2020				

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													Date: 7/5/23
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 4-South Sunset SC												
5													
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			\$9,054	\$9,054	\$9,054	\$9,054						\$36,216
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$300	\$300	\$300	\$300						\$1,200
15	Office Supplies, Postage			\$200	\$200	\$200	\$200						\$800
16	Building Maintenance Supplies and Repair			\$100	\$100	\$100	\$100						\$400
17	Printing and Reproduction			\$117	\$117	\$117	\$117						\$468
18	Insurance			\$650	\$650	\$650	\$650						\$2,600
19	Staff Training			\$0	\$0	\$0	\$0						\$0
20	Staff Travel-(Local & Out of Town)			\$200	\$200	\$200	\$200						\$800
21	Rental of Equipment			\$50	\$50	\$50	\$50						\$200
22													
23	CONSULTANTS												
24	Professional Fees-Instructor			\$1,000	\$1,000	\$1,000	\$1,000						\$4,000
25													
26													
27	OTHER												
28	Program Expenses			\$1,000	\$1,000	\$1,000	\$1,000						\$4,000
29	Communications			\$491	\$491	\$491	\$491						\$1,964
30	Recruitment Expenses			\$75	\$75	\$75	\$75						\$300
31													
32													
33													
34	TOTAL OPERATING EXPENSE			<u>\$13,237</u>	<u>\$13,237</u>	<u>\$13,237</u>	<u>\$13,237</u>						\$52,948
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 4 Site Chart
1__ of __1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677-7607

<u>SITES:</u> (Community Services)	South Sunset Senior Center				
Name of Site					
Address and Zip	2601 40th Ave/Vicente, S.F., CA 94116				
Phone Number	415-566-2845				
Fax Number					
Neighborhood	South Sunset				
Muni Line #s	Muni 29, L				
Person in Charge	Lance Ma				
Site Manager	Michael Li				
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 3:00 pm				
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Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
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Appendix A - Services to be Provided
SELF-HELP FOR THE ELDERLY – MENDELSON HOUSE SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

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City	City and County of San Francisco, a municipal corporation.
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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	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.
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.
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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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
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workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
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 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
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 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	300	300	300	300
Activity Scheduling	900	900	900	900
Translation Services	240	240	240	240
Social Services	310	310	310	310
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
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 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
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Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

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HSA OCM
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X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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						7/5/2023
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name		Term			
6	SELF-HELP FOR THE ELDERLY		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Service-District 6 Mendelsohn House SC FY 23-27					
10	Budget Reference Page No.(s)					Total
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	\$72,755	\$72,755	\$72,755	\$72,755	\$291,020
14	Operating Expenses	\$16,352	\$16,352	\$16,352	\$16,352	\$65,408
15	Subtotal	\$89,107	\$89,107	\$89,107	\$89,107	\$356,428
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$13,367	\$13,367	\$13,367	\$13,367	\$53,468
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$102,474	\$102,474	\$102,474	\$102,474	\$409,896
20	HSA Revenues					
21	Local Funds	\$102,474	\$102,474	\$102,474	\$102,474	\$409,896
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$102,474	\$102,474	\$102,474	\$102,474	\$409,896
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$102,474	\$102,474	\$102,474	\$102,474	\$409,896
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair	Telephone No.: 415-677-7682				
40	HSA-CO Review Signature:	_____				
41	HSA #1	12/2/2020				

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	SELF-HELP FOR THE ELDERLY									
4	Program: Community Service-District 6 Mendelsohn House SC FY 23-27									
5										
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	7/1/23 - 6/30/27
		Agency Totals		HSA Program		DAS	DAS	DAS	DAS	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	Budgeted Salary
12	POSITION TITLE									
13	Community Service Manager	\$64,480	1.00	10%	0.10	\$6,448	\$6,448	\$6,448	\$6,448	\$25,792
14	Cong Meal Program Manager	\$64,480	1.00	6%	0.06	\$3,546	\$3,546	\$3,546	\$3,546	\$14,184
15	Asst Center Oprations Manager	\$47,840	1.00	6%	0.06	\$2,631	\$2,631	\$2,631	\$2,631	\$10,524
16	Center Coordinator	\$43,909	1.00	65%	0.65	\$28,541	\$28,541	\$28,541	\$28,541	\$114,164
17	Program Assistant	\$44,782	1.00	35%	0.35	\$15,674	\$15,674	\$15,674	\$15,674	\$62,696
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$265,491	5.00	121%	1.21	\$56,840	\$56,840	\$56,840	\$56,840	\$227,360
31										
32	FRINGE BENEFIT RATE	28%								
33	EMPLOYEE FRINGE BENEFITS	\$74,337				\$15,915	\$15,915	\$15,915	\$15,915	\$63,660
34										
35										
36	TOTAL SALARIES & BENEFITS	\$339,828				\$72,755	\$72,755	\$72,755	\$72,755	\$291,020
37	HSA #2									12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													Date: 7/5/23
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 6 Mendelsohn House SC FY 23-27												
5													
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 7/1/23 - 6/30/27
13	Rental of Property			\$9,054	\$9,054	\$9,054	\$9,054						\$36,216
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$1,000	\$1,000	\$1,000	\$1,000						\$4,000
15	Office Supplies, Postage			\$250	\$250	\$250	\$250						\$1,000
16	Building Maintenance Supplies and Repair			\$500	\$500	\$500	\$500						\$2,000
17	Printing and Reproduction			\$100	\$100	\$100	\$100						\$400
18	Insurance			\$650	\$650	\$650	\$650						\$2,600
19	Staff Training			\$0	\$0	\$0	\$0						\$0
20	Staff Travel-(Local & Out of Town)			\$150	\$150	\$150	\$150						\$600
21	Rental of Equipment			\$50	\$50	\$50	\$50						\$200
22													
23	CONSULTANTS												
24	Professional Fees-Instructor			\$3,245	\$3,245	\$3,245	\$3,245						\$12,980
25													
26													
27	OTHER												
28	Program Expenses			\$1,000	\$1,000	\$1,000	\$1,000						\$4,000
29	Communications			\$278	\$278	\$278	\$278						\$1,112
30	Recruitment Expenses			\$75	\$75	\$75	\$75						\$300
31													
32													
33													
34	TOTAL OPERATING EXPENSE			\$16,352	\$16,352	\$16,352	\$16,352						\$65,408
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 6 Site Chart
1__ of __1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677-7607

<u>SITES:</u> (Community Services)	Woolf House Senior Center	Mendelsohn House			
Name of Site					
Address and Zip	801 Howard Street, S.F., CA 94103	737 Folsom Street, S.F., CA94107			
Phone Number	415-981-2166	415-243-9018			
Fax Number					
Neighborhood	South of Market	South of Market			
Muni Line #s	Muni 8, 8AX, 8BX, 12, 30, 45, 5, 5R, T, J, M, N, L, K, S	Muni 8, 8AX, 8BX, 12, 30, 45, 5, 5R, T, J, M, N, L, K, S			
Person in Charge	Lance Ma	Lance Ma			
Site Manager	Ella Li	Koobie Lam			
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education	Congregate Meals/HDM Community/Social Service Nutrition Education			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 2:00 pm	M – F 9:00 am – 2:00 pm			
Hours of <u>scheduled</u> programming	M – F 9:00 am – 2:00 pm	M – F 9:00 am – 2:00 pm			
Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
SELF-HELP FOR THE ELDERLY - WOOLF HOUSE SENIOR CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	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.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	170	170	170	170
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Translation Services	230	230	230	230
Social Services	300	300	300	300
1 unit of service = 1 hour of service provision				

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Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
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and

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HSA OCM
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X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

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13	Salaries & Benefits	\$72,755	\$72,755	\$72,755	\$72,755	\$291,020
14	Operating Expenses	\$14,635	\$14,635	\$14,635	\$14,635	\$58,540
15	Subtotal	\$87,390	\$87,390	\$87,390	\$87,390	\$349,560
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$13,109	\$13,109	\$13,109	\$13,109	\$52,434
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$100,499	\$100,499	\$100,499	\$100,499	\$401,996
20	HSA Revenues					
21	Local Funds	\$100,499	\$100,499	\$100,499	\$100,499	\$401,996
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$100,499	\$100,499	\$100,499	\$100,499	\$401,996
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$100,499	\$100,499	\$100,499	\$100,499	\$401,996
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair	Telephone No.: 415-677-7682				
40	HSA-CO Review Signature:	_____				
41	HSA #1	12/2/2020				

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	SELF-HELP FOR THE ELDERLY									
4	Program: Community Service-District 6-Woolf House SC FY 23-27									
5										
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	7/1/23 - 6/30/27
		Agency Totals		HSA Program		DAS	DAS	DAS	DAS	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Community Service Manager	\$64,480	1.00	10%	0.10	\$6,448	\$6,448	\$6,448	\$6,448	\$25,792
14	Cong Meal Program Manager	\$64,480	1.00	6%	0.06	\$3,546	\$3,546	\$3,546	\$3,546	\$14,184
15	Asst Center Oprations Manager	\$47,840	1.00	6%	0.06	\$2,631	\$2,631	\$2,631	\$2,631	\$10,524
16	Center Coordinator	\$43,909	1.00	65%	0.65	\$28,541	\$28,541	\$28,541	\$28,541	\$114,164
17	Program Assistant	\$44,782	1.00	35%	0.35	\$15,674	\$15,674	\$15,674	\$15,674	\$62,696
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$265,491	5.00	121%	1.21	\$56,840	\$56,840	\$56,840	\$56,840	\$227,360
31										
32	FRINGE BENEFIT RATE	28%								
33	EMPLOYEE FRINGE BENEFITS	\$74,337				\$15,915	\$15,915	\$15,915	\$15,915	\$63,660
34										
35										
36	TOTAL SALARIES & BENEFITS	\$339,828				\$72,755	\$72,755	\$72,755	\$72,755	\$291,020
37	HSA #2									12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 6-Woolf House SC FY 23-27												
5													
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			\$9,054	\$9,054	\$9,054	\$9,054						\$36,216
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$1,232	\$1,232	\$1,232	\$1,232						\$4,928
15	Office Supplies, Postage			\$250	\$250	\$250	\$250						\$1,000
16	Building Maintenance Supplies and Repair			\$100	\$100	\$100	\$100						\$400
17	Printing and Reproduction												\$0
18	Insurance			\$650	\$650	\$650	\$650						\$2,600
19	Staff Training			\$0	\$0	\$0	\$0						\$0
20	Staff Travel-(Local & Out of Town)			\$150	\$150	\$150	\$150						\$600
21	Rental of Equipment			\$50	\$50	\$50	\$50						\$200
22													
23	CONSULTANTS												
24	Professional Fees-Instructor			\$1,582	\$1,582	\$1,582	\$1,582						\$6,328
25													
26													
27	OTHER												
28	Program Expenses			\$1,000	\$1,000	\$1,000	\$1,000						\$4,000
29	Communications			\$492	\$492	\$492	\$492						\$1,968
30	Recruitment Expenses			\$75	\$75	\$75	\$75						\$300
31													
32													
33													
34	TOTAL OPERATING EXPENSE			<u>\$14,635</u>	<u>\$14,635</u>	<u>\$14,635</u>	<u>\$14,635</u>						\$58,540
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 6 Site Chart
1__ of __1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677-7607

<u>SITES:</u> (Community Services)	Woolf House Senior Center	Mendelsohn House			
Name of Site					
Address and Zip	801 Howard Street, S.F., CA 94103	737 Folsom Street, S.F., CA94107			
Phone Number	415-981-2166	415-243-9018			
Fax Number					
Neighborhood	South of Market	South of Market			
Muni Line #s	Muni 8, 8AX, 8BX, 12, 30, 45, 5, 5R, T, J, M, N, L, K, S	Muni 8, 8AX, 8BX, 12, 30, 45, 5, 5R, T, J, M, N, L, K, S			
Person in Charge	Lance Ma	Lance Ma			
Site Manager	Ella Li	Koobie Lam			
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education	Congregate Meals/HDM Community/Social Service Nutrition Education			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 2:00 pm	M – F 9:00 am – 2:00 pm			
Hours of <u>scheduled</u> programming	M – F 9:00 am – 2:00 pm	M – F 9:00 am – 2:00 pm			
Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
SELF-HELP FOR THE ELDERLY – WEST PORTAL CLUBHOUSE

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	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.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	180	180	180	180
Activity Scheduling	900	900	900	900
Translation Services	240	240	240	240
Social Services	310	310	310	310
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Tahir Shaikh
Contract Manager
HSA OCM
tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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						7/5/2023
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name		Term			
6	SELF-HELP FOR THE ELDERLY		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Service-District 7-West Portal SC FY 23-27					
10	Budget Reference Page No.(s)					Total
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
12	Expenditures					
13	Salaries & Benefits	\$72,755	\$72,755	\$72,755	\$72,755	\$291,020
14	Operating Expenses	\$14,019	\$14,019	\$14,019	\$14,019	\$56,076
15	Subtotal	\$86,774	\$86,774	\$86,774	\$86,774	\$347,096
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$13,016	\$13,016	\$13,016	\$13,016	\$52,064
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$99,790	\$99,790	\$99,790	\$99,790	\$399,160
20	HSA Revenues					
21	Local Funds	\$99,790	\$99,790	\$99,790	\$99,790	\$399,160
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$99,790	\$99,790	\$99,790	\$99,790	\$399,160
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$99,790	\$99,790	\$99,790	\$99,790	\$399,160
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair		Telephone No.: 415-677-7682			
40	HSA-CO Review Signature: _____					
41	HSA #1					12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													7/5/2023
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 7-West Portal SC FY 23-27												
5													
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			<u>\$9,054</u>	<u>\$9,054</u>	<u>\$9,054</u>	<u>\$9,054</u>						<u>\$36,216</u>
14	Utilities(Elec, Water, Gas, Phone, Garbage)			<u>\$616</u>	<u>\$616</u>	<u>\$616</u>	<u>\$616</u>						<u>\$2,462</u>
15	Office Supplies, Postage			<u>\$250</u>	<u>\$250</u>	<u>\$250</u>	<u>\$250</u>						<u>\$1,000</u>
16	Building Maintenance Supplies and Repair			<u>\$100</u>	<u>\$100</u>	<u>\$100</u>	<u>\$100</u>						<u>\$400</u>
17	Printing and Reproduction												<u>\$0</u>
18	Insurance			<u>\$650</u>	<u>\$650</u>	<u>\$650</u>	<u>\$650</u>						<u>\$2,600</u>
19	Staff Training			<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>						<u>\$0</u>
20	Staff Travel-(Local & Out of Town)			<u>\$150</u>	<u>\$150</u>	<u>\$150</u>	<u>\$150</u>						<u>\$600</u>
21	Rental of Equipment			<u>\$50</u>	<u>\$50</u>	<u>\$50</u>	<u>\$50</u>						<u>\$200</u>
22													
23	CONSULTANTS												
24	Professional Fees-Instructor			<u>\$ 1,582</u>	<u>\$ 1,582</u>	<u>\$ 1,582</u>	<u>\$ 1,582</u>						<u>\$6,328</u>
25													
26													
27	OTHER												
28	Program Expenses			<u>\$1,000</u>	<u>\$1,000</u>	<u>\$1,000</u>	<u>\$1,000</u>						<u>\$4,000</u>
29	Communications			<u>\$492</u>	<u>\$492</u>	<u>\$492</u>	<u>\$492</u>						<u>\$1,968</u>
30	Recruitment Expenses			<u>\$75</u>	<u>\$75</u>	<u>\$75</u>	<u>\$75</u>						<u>\$300</u>
31													
32													
33													
34	TOTAL OPERATING EXPENSE			<u>\$14,019</u>	<u>\$14,019</u>	<u>\$14,019</u>	<u>\$14,019</u>						<u>\$56,076</u>
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 7 Site Chart
1__ of __1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677-7607

<u>SITES:</u> (Community Services)	West Portal Club House				
Name of Site					
Address and Zip	131 Lenox Way, S.F., CA 94127				
Phone Number	415-650-9796				
Fax Number					
Neighborhood	West Portal				
Muni Line #s	Muni 57, L, M, K				
Person in Charge	Lance Ma				
Site Manager	Jani Chow				
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 2:00 pm				
Hours of <u>scheduled</u> programming	M – F 9:00 am – 2:00 pm				
Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
SELF-HELP FOR THE ELDERLY – JOHN KING COMMUNITY CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	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.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	200	200	200	200
Activity Scheduling	900	900	900	900
Translation Services	230	230	230	230
Social Services	300	300	300	300
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Tahir Shaikh
Contract Manager
HSA OCM
tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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						7/5/2023
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name		Term			
6	SELF-HELP FOR THE ELDERLY		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Service-District 10-John King SC FY 23-27					
10	Budget Reference Page No.(s)					Total
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
12	Expenditures					
13	Salaries & Benefits	\$66,417	\$66,417	\$66,417	\$66,417	\$265,668
14	Operating Expenses	\$20,527	\$20,527	\$20,527	\$20,527	\$82,108
15	Subtotal	\$86,944	\$86,944	\$86,944	\$86,944	\$347,776
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$13,040	\$13,040	\$13,040	\$13,040	\$52,160
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$99,984	\$99,984	\$99,984	\$99,984	\$399,936
20	HSA Revenues					
21	Local Funds	\$99,984	\$99,984	\$99,984	\$99,984	\$399,936
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$99,984	\$99,984	\$99,984	\$99,984	\$399,936
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$99,984	\$99,984	\$99,984	\$99,984	\$399,936
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair	Telephone No.: 415-677-7682				
40	HSA-CO Review Signature:	_____				
41	HSA #1	12/2/2020				

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	SELF-HELP FOR THE ELDERLY									
4	Program: Community Service-District 10-John King SC FY 23-27									
5										
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	7/1/23 - 6/30/27
		Agency Totals		HSA Program		DAS	DAS	DAS	DAS	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Community Service Manager	\$64,480	1.00	10%	0.10	\$6,448	\$6,448	\$6,448	\$6,448	\$25,792
14	Cong Meal Program Manager	\$64,480	1.00	5%	0.05	\$3,224	\$3,224	\$3,224	\$3,224	\$12,896
15	Asst Center Operations Manager	\$47,840	1.00	5%	0.05	\$2,392	\$2,392	\$2,392	\$2,392	\$9,568
16	Center Coordinator	\$43,909	1.00	55%	0.55	\$24,150	\$24,150	\$24,150	\$24,150	\$96,600
17	Program Assistant	\$44,782	1.00	35%	0.35	\$15,674	\$15,674	\$15,674	\$15,674	\$62,696
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$ 265,491	5.00	110%	1.10	\$51,888	\$51,888	\$51,888	\$51,888	\$207,552
31										
32	FRINGE BENEFIT RATE	28%								
33	EMPLOYEE FRINGE BENEFITS	\$74,337				\$14,529	\$14,529	\$14,529	\$14,529	\$58,116
34										
35										
36	TOTAL SALARIES & BENEFITS	\$339,828				\$66,417	\$66,417	\$66,417	\$66,417	\$265,668
37	HSA #2									12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													Date: 7/5/23
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 10-John King SC FY 23-27												
5													
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 7/1/23 - 6/30/27
13	Rental of Property			\$3,940	\$3,940	\$3,940	\$3,940						\$15,760
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$8,176	\$8,176	\$8,176	\$8,176						\$32,702
15	Office Supplies, Postage			\$213	\$213	\$213	\$213						\$852
16	Building Maintenance Supplies and Repair			\$5,206	\$5,206	\$5,206	\$5,206						\$20,824
17	Printing and Reproduction			\$75	\$75	\$75	\$75						\$300
18	Insurance			\$650	\$650	\$650	\$650						\$2,600
19	Staff Training			\$0	\$0	\$0	\$0						\$0
20	Staff Travel-(Local & Out of Town)			\$150	\$150	\$150	\$150						\$600
21	Rental of Equipment			\$50	\$50	\$50	\$50						\$200
22													
23	CONSULTANTS												
24	Professional Fees-Instructor			\$500	\$500	\$500	\$500						\$2,000
25													\$0
26													
27	OTHER												
28	Program Expenses			\$1,000	\$1,000	\$1,000	\$1,000						\$4,000
29	Communications			\$492	\$492	\$492	\$492						\$1,968
30	Recruitment Expenses			\$75	\$75	\$75	\$75						\$300
31													
32													\$0
33													
34	TOTAL OPERATING EXPENSE			\$20,527	\$20,527	\$20,527	\$20,527						\$82,108
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 10 Site Chart
1 of 1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677-7607

<u>SITES:</u> (Community Services)	John King Senior Center				
Name of Site					
Address and Zip	500 Raymond Ave, S.F., CA 94134				
Phone Number	415-239-9919				
Fax Number					
Neighborhood	Visitacion Valley				
Muni Line #s	Muni 8, 8BX, 56				
Person in Charge	Lance Ma				
Site Manager	Joe Chen				
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 2:00 pm				
Hours of <u>scheduled</u> programming	M – F 9:00 am – 2:00 pm				
Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
SELF-HELP FOR THE ELDERLY - GENEVA COMMUNITY CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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.
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City	City and County of San Francisco, a municipal corporation.
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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	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.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
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SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
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Socially Isolated	Having few social relationships and few people to interact with regularly.
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Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	170	170	170	170
Activity Scheduling	1,100	1,100	1,100	1,100
Translation Services	290	290	290	290
Social Services	330	330	330	330
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Tahir Shaikh
Contract Manager
HSA OCM
tahir.shaikh@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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						7/5/2023
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name		Term			
6	SELF-HELP FOR THE ELDERLY		7/1/23 - 6/30/27			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Community Service-District 11-Geneva SC FY 23-27					
10	Budget Reference Page No.(s)					Total
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
12	Expenditures					
13	Salaries & Benefits	\$66,417	\$66,417	\$66,417	\$66,417	\$265,669
14	Operating Expenses	\$40,256	\$40,256	\$40,256	\$40,256	\$161,024
15	Subtotal	\$106,673	\$106,673	\$106,673	\$106,673	\$426,693
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$16,001	\$16,001	\$16,001	\$16,001	\$64,004
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$122,673	\$122,673	\$122,673	\$122,673	\$490,692
20	HSA Revenues					
21	Local Funds	\$122,673	\$122,673	\$122,673	\$122,673	\$490,692
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$122,673	\$122,673	\$122,673	\$122,673	\$490,692
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$122,673	\$122,673	\$122,673	\$122,673	\$490,692
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair	Telephone No.: 415-677-7682				
40	HSA-CO Review Signature:	_____				
41	HSA #1	12/2/2020				

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	SELF-HELP FOR THE ELDERLY									
4	Program: Community Service-District 11-Geneva SC FY 23-27									
5										
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	7/1/23 - 6/30/27
		Agency Totals		DAS Program		DAS	DAS	DAS	DAS	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	Budgeted Salary
12	POSITION TITLE									
13	Community Service Manager	\$64,480	1.00	10%	0.10	\$6,448	\$6,448	\$6,448	\$6,448	\$25,792
14	Cong Meal Program Manager	\$64,480	1.00	5%	0.05	\$3,224	\$3,224	\$3,224	\$3,224	\$12,896
15	Asst Center Oprations Manager	\$47,840	1.00	5%	0.05	\$2,392	\$2,392	\$2,392	\$2,392	\$9,568
16	Center Coordinator	\$43,909	1.00	55%	0.55	\$24,150	\$24,150	\$24,150	\$24,150	\$96,600
17	Program Assistant	\$44,782	1.00	35%	0.35	\$15,674	\$15,674	\$15,674	\$15,674	\$62,696
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$265,491	5.00	110%	1.10	\$51,888	\$51,888	\$51,888	\$51,888	\$207,552
31										
32	FRINGE BENEFIT RATE	28%								
33	EMPLOYEE FRINGE BENEFITS	\$53,098				\$14,529	\$14,529	\$14,529	\$14,529	\$58,116
34										
35										
36	TOTAL SALARIES & BENEFITS	\$318,589				\$66,417	\$66,417	\$66,417	\$66,417	\$265,668
37	HSA #2									12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													Date: 7/5/23
3	SELF-HELP FOR THE ELDERLY												
4	Program: Community Service-District 11-Geneva SC FY 23-27												
5													
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			\$30,282	\$30,282	\$30,282	\$30,282						\$121,128
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$4,969	\$4,969	\$4,969	\$4,969						\$19,876
15	Office Supplies, Postage			\$213	\$213	\$213	\$213						\$852
16	Building Maintenance Supplies and Repair			\$1,000	\$1,000	\$1,000	\$1,000						\$4,000
17	Printing and Reproduction			\$175	\$175	\$175	\$175						\$700
18	Insurance			\$650	\$650	\$650	\$650						\$2,600
19	Staff Training			\$0	\$0	\$0	\$0						\$0
20	Staff Travel-(Local & Out of Town)			\$300	\$300	\$300	\$300						\$1,200
21	Rental of Equipment			\$100	\$100	\$100	\$100						\$400
22													
23	CONSULTANTS												
24	Professional Fees-Instructor			1,000 ₱	1,000 ₱	1,000 ₱	1,000 ₱						\$4,000
25													
26													
27	OTHER												
28	Program Expenses			\$1,000	\$1,000	\$1,000	\$1,000						\$4,000
29	Communications			\$492	\$492	\$492	\$492						\$1,968
30	Recruitment Expenses			\$75	\$75	\$75	\$75						\$300
31													
32													
33													
34	TOTAL OPERATING EXPENSE			\$40,256	\$40,256	\$40,256	\$40,256						\$161,024
35													
36	HSA #3												12/2/2020

Appendix F-Self-Help for the Elderly District 11 Site Chart
1 of 1

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Self-Help for the Elderly

FISCAL YEAR: FY23-27

CONTRACT MAILING ADDRESS: 731 Sansome Street, Suite 100, San Francisco, CA94111

COMMUNITY SERVICE MANAGER: BENNY CHAN

PHONE NO.: (415) 677 7607

<u>SITES:</u> (Community Services)	Geneva Community Center				
Name of Site					
Address and Zip	5050 Mission Street, Unit C, S.F., CA 94112				
Phone Number	415-347-7194				
Fax Number					
Neighborhood	Excelsior/Outer Mission				
Muni Line #s	Muni 8, 14, 14R, 43, 49, 54				
Person in Charge	Lance Ma				
Site Manager	Joyce Kwok				
Programs Offered at Site	Congregate Meals/HDM Community/Social Service Nutrition Education				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M – F 9:00 am – 5:00 pm				
Hours of <u>scheduled</u> programming	M – F 9:00 am – 5:00 pm				
Days closed	New Year's Day, Martin Luther King, Jr. Day, Chinese New Year, President's Day, Memorial Day, Independence Day, Labor Day, Indigenous Peoples Day, Veterans Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Appendix A - Services to be Provided
SEQUOIA LIVING / SAN FRANCISCO SENIOR CENTER – AQUATIC PARK

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	SEQUOIA LIVING
Higher Learning Classes	College-level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco's Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.

Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational,

and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:

- i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
 - ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are

contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Higher Learning classes will be offered at Sequoia Living / Aquatic Park Senior Center. These classes will be open to any older adult or adult with disabilities interested. A participant will register for class(es) as a separate program of the community service center. Course topics are “Women’s Literature,” “Ceramics,” “Painting,” “Mind-Body-Spirit,” “Basic Art,” “Music Appreciation,” and “Tai Chi.” These classes are college level classes taught by instructors with advanced degrees and teaching experience in the field of study.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	1,200	1,200	1,200	1,200
Activity Scheduling	9,000	9,000	9,000	9,000
Translation Services	864	864	864	864
Social Services	1,056	1,056	1,056	1,056
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

Higher Learning

1. Class participants report that the course increased their socialization opportunities and interaction with others. Target: 80%
2. Class participants report an increase in knowledge of the Higher Learning course topic. Target: 80%

Based on a satisfaction survey created by the grantee with input from DAS OCP and with a sample size of at least 75% of the participants enrolled in the class.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.

13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.

14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Ella Lee
Contract Manager
HSA OCM
ella.lee@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Sequoia Living					Term 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: Community Services at Aquatic Park Senior Center					
Budget Reference Page No.(s)					7/1/23 - 6/30/27
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	Total
Expenditures					
Salaries & Benefits	\$362,235	\$362,235	\$362,235	\$362,235	\$1,448,940
Operating Expenses	\$88,398	\$88,398	\$88,398	\$88,398	\$353,592
Subtotal	\$450,633	\$450,633	\$450,633	\$450,633	\$1,802,532
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$67,595	\$67,595	\$67,595	\$67,595	\$270,380
Subcontractor/Capital Expenditures	\$10,633	\$10,633	\$10,633	\$10,633	\$42,532
Total Expenditures	\$528,861	\$528,861	\$528,861	\$528,861	\$2,115,444
HSA Revenues					
Local Funds	\$528,861	\$528,861	\$528,861	\$528,861	\$2,115,444
TOTAL HSA REVENUES	\$528,861	\$528,861	\$528,861	\$528,861	\$2,115,444
Other Revenues					
Total Revenues	\$528,861	\$528,861	\$528,861	\$528,861	\$2,115,444
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					6/20/2018

Sequoia Living

Appendix B, Page 2

Program: Community Services at Aquatic Park Senior Center

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	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	TOTAL Budgeted Salary
Service Coordinator	\$78,426	0.93	99%	0.92	\$72,544	\$72,544	\$72,544	\$72,544	\$290,176
Program Supervisor	\$86,665	1.00	33%	0.33	\$28,937	\$28,937	\$28,937	\$28,937	\$115,748
Program Assistant	\$61,737	1.00	100%	1.00	\$61,737	\$61,737	\$61,737	\$61,737	\$246,948
Program Coordinator	\$60,320	1.00	100%	1.00	\$60,320	\$60,320	\$60,320	\$60,320	\$241,280
Receptionist (2)	\$51,181	0.88	100%	0.88	\$44,783	\$44,783	\$44,783	\$44,783	\$179,132
				-					
				-					
				-					
				-					
				-					
				-					
TOTALS	\$338,329	4.81	433%	4.13	\$268,321	\$268,321	\$268,321	\$268,321	\$1,073,284
FRINGE BENEFIT RATE	35.00%								
EMPLOYEE FRINGE BENEFITS	\$118,417				\$93,914	\$93,914	\$93,914	\$93,914	\$375,656
TOTAL SALARIES & BENEFITS	\$456,746				\$362,235	\$362,235	\$362,235	\$362,235	\$1,448,940
HSA #2									6/20/2018

Sequoia Living

Program: Community Services at Aquatic Park Senior Center

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						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
OTHER						
Collage Class		\$8,160	\$8,160	\$8,160	\$8,160	\$32,640
Music Appreciation		\$9,600	\$9,600	\$9,600	\$9,600	\$38,400
Mind Body Exercise		\$9,120	\$9,120	\$9,120	\$9,120	\$36,480
Woman's Literature		\$12,000	\$12,000	\$12,000	\$12,000	\$48,000
Creative Writing		\$6,858	\$6,858	\$6,858	\$6,858	\$27,432
Acting & Self-Expression		\$8,160	\$8,160	\$8,160	\$8,160	\$32,640
Moderate Exercise		\$4,080	\$4,080	\$4,080	\$4,080	\$16,320
Movement Class		\$5,100	\$5,100	\$5,100	\$5,100	\$20,400
English as a Second Language		\$6,120	\$6,120	\$6,120	\$6,120	\$24,480
Chair & Mat Yoga		\$12,480	\$12,480	\$12,480	\$12,480	\$49,920
Art With Elders		\$6,720	\$6,720	\$6,720	\$6,720	\$26,880
TOTAL OPERATING EXPENSES		\$88,398	\$88,398	\$88,398	\$88,398	\$353,592

HSA #3

6/20/2018

Sequoia Living Appendix B, Page 4
 Program: Community Services at Aquatic Park Senior Center

Subcontractor/Capital Expenditures

<u>SUBCONTRACTORS</u>	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
Jewish Community Center, weekly Women's Literature Class	\$10,633	\$10,633	\$10,633	\$10,633	\$42,532
TOTAL SUBCONTRACTOR COST	\$10,633	\$10,633	\$10,633	\$10,633	\$42,532
<u>EQUIPMENT</u>					
TOTAL EQUIPMENT COST					
<u>REMODELING</u>					
TOTAL REMODELING COST					
TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE	\$10,633	\$10,633	\$10,633	\$10,633	\$42,532
HSA #4					6/20/2018

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Sequoia Living San Francisco Senior Center

FISCAL YEAR: FY 23/24 – 26/27

CONTRACT MAILING ADDRESS: 1525 Post Street, San Francisco, CA 94109

DIRECTOR: Judith Dancer

PHONE NO.: 415-775-2562

<u>SITES:</u> (Community Services)					
Name of Site	Downtown Senior Center	Aquatic Park Senior Center			
Address and Zip	481 O'Farrell Street 94102	890 Beach Street 94109			
Phone Number	415-771-7950	415-775-1866			
Fax Number	415-923-4497	415-775-4020			
Neighborhood	Tenderloin	SF Maritime National Historical Park/Polk Gulch			
Muni Line #s	#38, #39, #19	#28, #47, #49, #30, #F, #19			
Person in Charge	Judith Dancer	Judith Dancer			
Site Manager	Judith Dancer	Frank Mitchell			
Programs Offered at Site	Community Services – Multiservice senior center programming – health and wellbeing education, lifelong learning, computers, hot breakfast & lunch, exercise, Chinese cultural song and dance, translation, ADRC, social services	Community Services – Multiservice senior center programming – health and wellbeing education, lifelong learning, computers, hot breakfast & lunch, exercise, Chinese cultural song and dance, translation, ADRC, social services			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M-F 8-4:30 Sat. and Sun. 8:00 – 12:00	M-F 7:30 – 4:00			
Hours of <u>scheduled</u> programming	M-T 9:00 – 4:00 F 9:00 – 3:30 Meals only on Sat. and Sun.	M-F – 9:00 – 3:30			
Days closed					
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes No

Appendix A - Services to be Provided
SEQUOIA LIVING / SAN FRANCISCO SENIOR CENTER – DOWNTOWN

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	SEQUOIA LIVING
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	950	950	950	950
Activity Scheduling	4,800	4,800	4,800	4,800
Translation Services	400	400	400	400
Social Services	938	938	938	938
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Melissa McGee
Program Analyst
DAS OCP
melissa.mcgee@sfgov.org

and

Ella Lee
Contract Manager
HSA OCM
ella.lee@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Sequoia Living					Term 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: Community Services at Downtown Senior Center					
Budget Reference Page No.(s)					7/1/23 - 6/30/27
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	Total
Expenditures					
Salaries & Benefits	\$236,234	\$236,234	\$236,234	\$236,234	\$944,936
Operating Expenses					
Subtotal	\$236,234	\$236,234	\$236,234	\$236,234	\$944,936
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$35,435	\$35,435	\$35,435	\$35,435	\$141,740
Subcontractor/Capital Expenditures					
Total Expenditures	\$271,669	\$271,669	\$271,669	\$271,669	\$1,086,676
HSA Revenues					
Local Funds	\$271,669	\$271,669	\$271,669	\$271,669	\$1,086,676
TOTAL HSA REVENUES	\$271,669	\$271,669	\$271,669	\$271,669	\$1,086,676
Other Revenues					
Total Revenues	\$271,669	\$271,669	\$271,669	\$271,669	\$1,086,676
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					6/20/2018

Sequoia Living

Appendix B, Page 2

Program: Community Services at Downtown Senior Center

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	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	TOTAL Budgeted Salary
Service Coordinator	\$86,718	1.00	100%	1.00	\$86,718	\$86,718	\$86,718	\$86,718	\$346,872
Activity Assistant	\$54,306	0.80	100%	0.80	\$43,445	\$43,445	\$43,445	\$43,445	\$173,780
Receptionist	\$51,745	0.50	100%	0.50	\$25,873	\$25,873	\$25,873	\$25,873	\$103,492
Program Coordinator	\$67,384	1.00	28%	0.28	\$18,953	\$18,953	\$18,953	\$18,953	\$75,812
				-					
				-					
				-					
				-					
				-					
				-					
				-					
TOTALS	\$260,154	3.30	328%	2.58	\$174,989	\$174,989	\$174,989	\$174,989	\$699,956
FRINGE BENEFIT RATE	35.00%								
EMPLOYEE FRINGE BENEFITS	\$91,052				\$61,245	\$61,245	\$61,245	\$61,245	\$244,980
TOTAL SALARIES & BENEFITS	\$351,206				\$236,234	\$236,234	\$236,234	\$236,234	\$944,936
HSA #2									6/20/2018

Sequoia Living

Appendix B, Page 3

Program: Community Services at Downtown Senior Center

Operating Expense Detail

<u>EXPENDITURE CATEGORY</u>	<u>TERM</u>					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						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
<u>CONSULTANTS</u>						
<u>OTHER</u>						
TOTAL OPERATING EXPENSES						
HSA #3						6/20/2018

APPENDIX F - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Sequoia Living San Francisco Senior Center

FISCAL YEAR: FY 23/24 – 26/27

CONTRACT MAILING ADDRESS: 1525 Post Street, San Francisco, CA 94109

DIRECTOR: Judith Dancer

PHONE NO.: 415-775-2562

<u>SITES:</u> (Community Services)					
Name of Site	Downtown Senior Center	Aquatic Park Senior Center			
Address and Zip	481 O'Farrell Street 94102	890 Beach Street 94109			
Phone Number	415-771-7950	415-775-1866			
Fax Number	415-923-4497	415-775-4020			
Neighborhood	Tenderloin	SF Maritime National Historical Park/Polk Gulch			
Muni Line #s	#38, #39, #19	#28, #47, #49, #30, #F, #19			
Person in Charge	Judith Dancer	Judith Dancer			
Site Manager	Judith Dancer	Frank Mitchell			
Programs Offered at Site	Community Services – Multiservice senior center programming – health and wellbeing education, lifelong learning, computers, hot breakfast & lunch, exercise, Chinese cultural song and dance, translation, ADRC, social services	Community Services – Multiservice senior center programming – health and wellbeing education, lifelong learning, computers, hot breakfast & lunch, exercise, Chinese cultural song and dance, translation, ADRC, social services			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	M-F 8-4:30 Sat. and Sun. 8:00 – 12:00	M-F 7:30 – 4:00			
Hours of <u>scheduled</u> programming	M-T 9:00 – 4:00 F 9:00 – 3:30 Meals only on Sat. and Sun.	M-F – 9:00 – 3:30			
Days closed					
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes No

Appendix A - Services to be Provided

SOUTHWEST COMMUNITY CORPORATION – IT BOOKMAN COMMUNITY CENTER

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	SOUTHWEST COMMUNITY CORPORATION
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	150	150	150	150
Activity Scheduling	1400	1400	1400	1400
Translation Services	100	100	100	100
Social Services	400	400	400	400
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Southwest Community Corp					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$176,183	\$176,183	\$176,183	\$176,183	\$704,732
Operating Expenses	\$88,268	\$88,268	\$88,268	\$88,268	\$353,072
Subtotal	\$264,451	\$264,451	\$264,451	\$264,451	\$1,057,804
Indirect Percentage (%)	14%	14%	14%	14%	14%
Indirect Cost	\$37,023	\$37,023	\$37,023	\$37,023	\$148,092
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$301,474	\$301,474	\$301,474	\$301,474	\$1,205,896
DAS Revenues					
General Funds	\$301,474	\$301,474	\$301,474	\$301,474	\$1,205,896
Total DAS Revenue	\$301,474	\$301,474	\$301,474	\$301,474	\$1,205,896
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$301,474	\$301,474	\$301,474	\$301,474	\$1,205,896
Full Time Equivalent (FTE)	2.00	2.00	2.00	2.00	8.00
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)									
DAS Salaries & Benefits	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
Position Title	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Executive Director	\$140,000	0.25	100%	0.25	\$35,000	\$35,000	\$35,000	\$35,000	\$140,000
Program Manager	\$62,088	0.75	100%	0.75	\$46,566	\$46,566	\$46,566	\$46,566	\$186,264
Data/Translation	\$52,200	0.50	100%	0.50	\$26,100	\$26,100	\$26,100	\$26,100	\$104,400
Facilities Manager	\$66,560	0.50	100%	0.50	\$33,280	\$33,280	\$33,280	\$33,280	\$133,120
Totals	\$320,848	2.00	400%	2.00	\$140,946	\$140,946	\$140,946	\$140,946	\$563,784
Fringe Benefits Rate	25%								
Employee Fringe Benefits	\$80,212				\$35,237	\$35,237	\$35,237	\$35,237	\$140,948
Total DAS Salaries and Benefits	\$401,060				\$176,183	\$176,183	\$176,183	\$176,183	\$704,732

HSA #2

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property	\$14,400	\$14,400	\$14,400	\$14,400	\$57,600
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$24,000	\$24,000	\$24,000	\$24,000	\$96,000
Office Supplies, Postage	\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Building Maintenance Supplies and Repair	\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Printing and Reproduction	\$1,268	\$1,268	\$1,268	\$1,268	\$5,072
Insurance	\$6,000	\$6,000	\$6,000	\$6,000	\$24,000
Staff Training					
Staff Travel					
Rental of Equipment	\$3,600	\$3,600	\$3,600	\$3,600	\$14,400
<u>Consultants</u>					
Senior Health	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
<u>Other</u>					
Program Supplies	\$6,000	\$6,000	\$6,000	\$6,000	\$24,000
Outing Transportation	\$4,800	\$4,800	\$4,800	\$4,800	\$19,200
Total DAS Operating Expenses	\$88,268	\$88,268	\$88,268	\$88,268	\$353,072
HSA #3					

APPENDIX F - SITE CHART

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

AGENCY: Southwest Community Corp

FISCAL YEAR: 23/24 – 26/27

CONTRACT: Community Services

DIRECTOR: Felisia Thibodeaux

PHONE NO.: 415-586-8020

SITES:					
Name of Site	IT Bookman Community Center				
Address and Zip	446 Randolph Street San Francisco, CA 94132				
Phone Number	415-586-8020				
Fax Number	415-586-0972				
Neighborhood	Lakeview/OMI				
Muni Line #s					
Person in Charge & Site Manager	Felisia Thibodeaux				
Programs Offered at Site	Community Services,				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thur ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thur ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thur ___ Fri ___ Sat ___ Sun	___ Mon ___ Tues ___ Wed ___ Thur ___ Fri ___ Sat ___ Sun
Hours Open	Monday – Friday: 9am – 5pm Saturday: 10am – 2pm				
Hours of <u>scheduled</u> programming	Monday – Friday: 9am – 5pm Saturday: 10am – 2pm				
Total number of service days in FY	295				
Days closed	New Years, MLK, Presidents, Memorial, Juneteenth, July4, Labor, Columbus Day, Veterans, Thanksgiving, Day after Thanksgiving, Christmas Eve, Shutdown Christmas Eve- New Years Eve				
ADA Accessible	<input checked="" type="checkbox"/> Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No

Appendix A - Services to be Provided
YMCA OF SAN FRANCISCO (Bayview Hunters Point)

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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.
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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	YMCA OF SAN FRANCISCO (Bayview Hunters Point)
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.
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Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

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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:

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- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

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 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	120	120	120	120
Activity Scheduling	184	184	184	184
Translation Services	12	12	12	12
Social Services	20	20	20	20
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name YMCA (Bayview)					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$88,830	\$88,830	\$88,830	\$88,830	\$355,320
Operating Expenses	\$41,605	\$41,605	\$41,605	\$41,605	\$166,420
Subtotal	\$130,435	\$130,435	\$130,435	\$130,435	\$521,740
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$19,565	\$19,565	\$19,565	\$19,565	\$78,260
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$150,000	\$150,000	\$150,000	\$150,000	\$600,000
DAS Revenues					
General Funds	\$150,000	\$150,000	\$150,000	\$150,000	\$600,000
Total DAS Revenue	\$150,000	\$150,000	\$150,000	\$150,000	\$600,000
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$150,000	\$150,000	\$150,000	\$150,000	\$600,000
Full Time Equivalent (FTE)	4.00	4.00	4.00	4.00	16.00
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)

DAS Salaries & Benefits	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	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Senior Program Director	\$110,462	1.00	15%	0.15	\$16,569	\$16,569	\$16,569	\$16,569	\$66,276
Administrative Assistant	\$131,040	1.00	10%	0.10	\$13,104	\$13,104	\$13,104	\$13,104	\$52,416
Fitness Instructor (AOA Chair)	\$129,308	1.00	23%	0.23	\$30,191	\$30,191	\$30,191	\$30,191	\$120,764
Community Engagement Specialist	\$56,000	1.00	20%	0.20	\$11,200	\$11,200	\$11,200	\$11,200	\$44,800
Totals	\$426,810	4.00	68%	0.68	\$71,064	\$71,064	\$71,064	\$71,064	\$284,256
Fringe Benefits Rate	25%								
Employee Fringe Benefits	\$106,703				\$17,766	\$17,766	\$17,766	\$17,766	\$71,064
Total DAS Salaries and Benefits	\$533,513				\$88,830	\$88,830	\$88,830	\$88,830	\$355,320

HSA #2

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance	\$8,400	\$8,400	\$8,400	\$8,400	\$33,600
Staff Training					
Staff Travel					
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
Client Food	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Stipends	\$900	\$900	\$900	\$900	\$3,600
Program Supply	\$2,305	\$2,305	\$2,305	\$2,305	\$9,220
Transportation	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
Entrance Fee	\$15,000	\$15,000	\$15,000	\$15,000	\$60,000
Total DAS Operating Expenses	\$41,605	\$41,605	\$41,605	\$41,605	\$166,420

HSA #3

APPENDIX F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse); Chinatown YMCA (Broadway Cove)
 FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

PHONE NO.: 415-242-7115

DIRECTOR: Danielle Fuentes

SITES: Name of Site	Stonestown Family YMCA Parkmerced	Mission YMCA	Stonestown Family YMCA Annex	Bayview Hunters Point YMCA	Huntersview
Address and Zip	3711 19 th Avenue San Francisco, CA 94132	4080 Mission St. San Francisco CA 94112	3150 20 th Avenue San Francisco, CA 94132	1601 Lane St, 94124	1101 Fairfax Ave, 94124
Phone Number	415-301-5309	415-586-6900	415-242-7135	415-822-7728	415-###-####
Fax Number	N/A		415-731-1456	415-822-7769	415-###-####
Neighborhood	District 7; Parkside	District 11	District 4; Parkside	Bayview	Bayview
Muni Line #s	M,K,28,28x,29, 18	14, 49, 23, N	M,K,28,28x,29, 18	T, 54, 44, 23	19, 54
Person in Charge	Danielle Fuentes	Karla Diaz	Danielle Fuentes	Tacing Parker	Tacing Parker
Site Manager	Anthony (Tony) Ortiz	Hazel Barry	Jazmin Aizpuru	Demetrius Durham	Nicole Yarbrough
Programs Offered at Site	Group Exercise, Social Programming, Lectures, etc	Group Exercise, Social Programming, workshops, art classes, 1 on 1 tech support, Congregate Meal Program, food pantry, & health screenings.	Group Exercise, Social Programming, Lectures, Computer Lab, Congregate Meal Program, Tax Assistance, etc	Lunch & Learn Group Exercise Excursions Volunteer Opportunities	Group Exercise Excursions Workshops
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	Monday, Tuesday, Thursday, Friday 9:30am- 5pm	Monday-Friday 8am-5pm *some programs extend past closed hours	Monday-Friday 8am-3pm *some programs extend past closed hours	M-F 8am-4pm Sa 8am-3:30pm	10am-5PM
Hours of <u>scheduled</u> programming	Monday, Tuesday, Thursday, Friday 10am- 5pm	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	10am-12pm & 1pm-3pm	10am-12pm
Total number of service days in FY	215 days; minus holidays or shutdown	265 days; minus holidays or shutdown	265 days; minus holidays or shutdown		
Days closed	Wednesday, Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Sunday	Saturday, Sunday (open some weekends)
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 F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse – Proposed Site); Chinatown YMCA (Broadway Cove)

FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

DIRECTOR: Danielle Fuentes

PHONE NO.: 415-242-7115

SITES: Name of Site	Buchanan YMCA	Richmond YMCA	Argonne Clubhouse	Chinatown YMCA	Broadway Cove
Address and Zip	1530 Buchanan Street San Francisco, CA 94115	360 18 th Avenue San Francisco, CA 94121	463 18 th Avenue San Francisco, CA 94121	865 Sacramento Street San Francisco, CA 94108	760 Front Street San Francisco, CA 94115
Phone Number	415-931-9622	415-666-9622	415-666-9622	415-576-9622	
Fax Number	N/A	N/A	N/A	N/A	N/A
Neighborhood	District 5-Western Addition	District 1-Richmond	District 1-Richmond	District 3-Chinatown	District 3-North Beach
Muni Line #s	2, 5,5R,22,38,38R	1,1X,2,5,5R,28,29,31,38, 38R	1,1X,2,5,5R,28,29,31,38, 38R	1,30,8,T	1,8,12
Person in Charge	Suzanne Medina	Danielle Fuentes	Danielle Fuentes	Andy Chu	Andy Chu
Site Manager	Joshua Pisciotta	Anthony (Tony) Ortiz	Anthony (Tony) Ortiz		
Programs Offered at Site	TBD if awarded: Group Exercise, Social Programming, Guest Speakers, Luncheons, enrichment activities, fieldtrips	Group Exercise, Social Programming, Lectures, Exercise Equipment, Sauna	Group Exercise, Social Programming	Group Exercise, Cooking Together, field trips, food bank, ESL classes, service connection, technology workshops, health and educational workshops, arts and crafts, bingo, celebration events	Group Exercise, service connection, technology workshops, arts and crafts, celebration events
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat (occasion) <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun
Hours Open	Monday-Friday 9am-5pm	Monday – Friday 5:30am to 9:00pm Saturday 7:30am -7:00 pm	TBD: proposed time	8am to 8pm	10 am to 5 pm
Hours of <u>scheduled</u> programming	Monday-Friday 9am-5pm	Monday-Friday 9am-5pm	Monday-Friday 9am- 12pm	Monday-Friday: 9am-2pm	Monday & Wednesday, 10am-12 pm
Total number of service days in FY	260 days; minus holidays or shutdown	250 days; minus holidays or shutdown	185 days; minus holidays or shutdown		
Days closed	Most Saturdays, Sunday, Holidays	Saturday, Sunday, Holidays (2 weeks in December)	185 days; minus holidays or shutdown	Sundays	Saturdays and Sundays
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
YMCA OF SAN FRANCISCO (Buchanan)

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	YMCA OF SAN FRANCISCO (Buchanan)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	100	100	100	100
Activity Scheduling	450	450	450	450
Translation Services	55	55	55	55
Social Services	135	135	135	135
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
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13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and

progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name YMCA (Buchanan)					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$98,475	\$98,475	\$98,475	\$98,475	\$393,900
Operating Expenses	\$17,177	\$17,177	\$17,177	\$17,177	\$68,708
Subtotal	\$115,652	\$115,652	\$115,652	\$115,652	\$462,608
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$17,348	\$17,348	\$17,348	\$17,348	\$69,392
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$133,000	\$133,000	\$133,000	\$133,000	\$532,000
DAS Revenues					
General Funds	\$133,000	\$133,000	\$133,000	\$133,000	\$532,000
Total DAS Revenue	\$133,000	\$133,000	\$133,000	\$133,000	\$532,000
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$133,000	\$133,000	\$133,000	\$133,000	\$532,000
Full Time Equivalent (FTE)	1.38	1.38	1.38	1.38	5.52
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)									
DAS Salaries & Benefits	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
Position Title	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Manager on Duty	\$65,520	0.25	100%	0.25	\$16,380	\$16,380	\$16,380	\$16,380	\$65,520
Community Programs Specialist	\$52,000	1.00	100%	1.00	\$52,000	\$52,000	\$52,000	\$52,000	\$208,000
Exercise Instructors	\$80,000	0.13	100%	0.13	\$10,400	\$10,400	\$10,400	\$10,400	\$41,600
Totals	\$197,520	1.38	300%	1.38	\$78,780	\$78,780	\$78,780	\$78,780	\$315,120
Fringe Benefits Rate	25%								
Employee Fringe Benefits	\$49,380				\$19,695	\$19,695	\$19,695	\$19,695	\$78,780
Total DAS Salaries and Benefits	\$246,900				\$98,475	\$98,475	\$98,475	\$98,475	\$393,900
HSA #2									

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance	\$1,433	\$1,433	\$1,433	\$1,433	\$5,732
Staff Training	\$500	\$500	\$500	\$500	\$2,000
Staff Travel					
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
Entrance Fees	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Program Supplies	\$2,244	\$2,244	\$2,244	\$2,244	\$8,976
Food & Beverage	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Bus Transportation	\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
Total DAS Operating Expenses	\$17,177	\$17,177	\$17,177	\$17,177	\$68,708

HSA #3

APPENDIX F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse); Chinatown YMCA (Broadway Cove)
 FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

PHONE NO.: 415-242-7115

DIRECTOR: Danielle Fuentes

SITES: Name of Site	Stonestown Family YMCA Parkmerced	Mission YMCA	Stonestown Family YMCA Annex	Bayview Hunters Point YMCA	Huntersview
Address and Zip	3711 19 th Avenue San Francisco, CA 94132	4080 Mission St. San Francisco CA 94112	3150 20 th Avenue San Francisco, CA 94132	1601 Lane St, 94124	1101 Fairfax Ave, 94124
Phone Number	415-301-5309	415-586-6900	415-242-7135	415-822-7728	415-###-####
Fax Number	N/A		415-731-1456	415-822-7769	415-###-####
Neighborhood	District 7; Parkside	District 11	District 4; Parkside	Bayview	Bayview
Muni Line #s	M,K,28,28x,29, 18	14, 49, 23, N	M,K,28,28x,29, 18	T, 54, 44, 23	19, 54
Person in Charge	Danielle Fuentes	Karla Diaz	Danielle Fuentes	Tacing Parker	Tacing Parker
Site Manager	Anthony (Tony) Ortiz	Hazel Barry	Jazmin Aizpuru	Demetrius Durham	Nicole Yarbrough
Programs Offered at Site	Group Exercise, Social Programming, Lectures, etc	Group Exercise, Social Programming, workshops, art classes, 1 on 1 tech support, Congregate Meal Program, food pantry, & health screenings.	Group Exercise, Social Programming, Lectures, Computer Lab, Congregate Meal Program, Tax Assistance, etc	Lunch & Learn Group Exercise Excursions Volunteer Opportunities	Group Exercise Excursions Workshops
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	Monday, Tuesday, Thursday, Friday 9:30am- 5pm	Monday-Friday 8am-5pm *some programs extend past closed hours	Monday-Friday 8am-3pm *some programs extend past closed hours	M-F 8am-4pm Sa 8am-3:30pm	10am-5PM
Hours of <u>scheduled</u> programming	Monday, Tuesday, Thursday, Friday 10am- 5pm	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	10am-12pm & 1pm-3pm	10am-12pm
Total number of service days in FY	215 days; minus holidays or shutdown	265 days; minus holidays or shutdown	265 days; minus holidays or shutdown		
Days closed	Wednesday, Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Sunday	Saturday, Sunday (open some weekends)
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 F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse – Proposed Site); Chinatown YMCA (Broadway Cove)

FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

DIRECTOR: Danielle Fuentes

PHONE NO.: 415-242-7115

SITES: Name of Site	Buchanan YMCA	Richmond YMCA	Argonne Clubhouse	Chinatown YMCA	Broadway Cove
Address and Zip	1530 Buchanan Street San Francisco, CA 94115	360 18 th Avenue San Francisco, CA 94121	463 18 th Avenue San Francisco, CA 94121	865 Sacramento Street San Francisco, CA 94108	760 Front Street San Francisco, CA 94115
Phone Number	415-931-9622	415-666-9622	415-666-9622	415-576-9622	
Fax Number	N/A	N/A	N/A	N/A	N/A
Neighborhood	District 5-Western Addition	District 1-Richmond	District 1-Richmond	District 3-Chinatown	District 3-North Beach
Muni Line #s	2, 5,5R,22,38,38R	1,1X,2,5,5R,28,29,31,38, 38R	1,1X,2,5,5R,28,29,31,38, 38R	1,30,8,T	1,8,12
Person in Charge	Suzanne Medina	Danielle Fuentes	Danielle Fuentes	Andy Chu	Andy Chu
Site Manager	Joshua Pisciotta	Anthony (Tony) Ortiz	Anthony (Tony) Ortiz		
Programs Offered at Site	TBD if awarded: Group Exercise, Social Programming, Guest Speakers, Luncheons, enrichment activities, fieldtrips	Group Exercise, Social Programming, Lectures, Exercise Equipment, Sauna	Group Exercise, Social Programming	Group Exercise, Cooking Together, field trips, food bank, ESL classes, service connection, technology workshops, health and educational workshops, arts and crafts, bingo, celebration events	Group Exercise, service connection, technology workshops, arts and crafts, celebration events
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat (occasion) <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun
Hours Open	Monday-Friday 9am-5pm	Monday – Friday 5:30am to 9:00pm Saturday 7:30am -7:00 pm	TBD: proposed time	8am to 8pm	10 am to 5 pm
Hours of <u>scheduled</u> programming	Monday-Friday 9am-5pm	Monday-Friday 9am-5pm	Monday-Friday 9am- 12pm	Monday-Friday: 9am-2pm	Monday & Wednesday, 10am-12 pm
Total number of service days in FY	260 days; minus holidays or shutdown	250 days; minus holidays or shutdown	185 days; minus holidays or shutdown		
Days closed	Most Saturdays, Sunday, Holidays	Saturday, Sunday, Holidays (2 weeks in December)	185 days; minus holidays or shutdown	Sundays	Saturdays and Sundays
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
YMCA OF SAN FRANCISCO (Chinatown)

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	YMCA OF SAN FRANCISCO (Chinatown)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	130	130	130	130
Activity Scheduling	550	550	550	550
Translation Services	200	200	200	200
Social Services	80	80	80	80
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name YMCA (Chinatown)					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$80,024	\$80,024	\$80,024	\$80,024	\$320,096
Operating Expenses	\$12,146	\$12,146	\$12,146	\$12,146	\$48,584
Subtotal	\$92,170	\$92,170	\$92,170	\$92,170	\$368,680
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$13,826	\$13,826	\$13,826	\$13,826	\$55,304
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$105,996	\$105,996	\$105,996	\$105,996	\$423,984
DAS Revenues					
General Funds	\$105,996	\$105,996	\$105,996	\$105,996	\$423,984
Total DAS Revenue	\$105,996	\$105,996	\$105,996	\$105,996	\$423,984
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$105,996	\$105,996	\$105,996	\$105,996	\$423,984
Full Time Equivalent (FTE)	1.69	1.69	1.69	1.69	6.76
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)

DAS Salaries & Benefits	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	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Program Coordinator	\$54,080	0.24	100%	0.24	\$12,979	\$12,979	\$12,979	\$12,979	\$51,916
Program Lead	\$48,883	0.50	100%	0.50	\$24,442	\$24,442	\$24,442	\$24,442	\$97,768
Program Assistant	\$39,104	0.50	40%	0.20	\$7,821	\$7,821	\$7,821	\$7,821	\$31,284
Translation Assistant	\$41,246	0.31	40%	0.12	\$5,115	\$5,115	\$5,115	\$5,115	\$20,460
Exercise Instructor	\$80,000	0.14	100%	0.14	\$11,200	\$11,200	\$11,200	\$11,200	\$44,800
Totals	\$263,313	1.69	380%	1.20	\$61,557	\$61,557	\$61,557	\$61,557	\$246,228
Fringe Benefits Rate	30%								
Employee Fringe Benefits	\$78,994				\$18,467	\$18,467	\$18,467	\$18,467	\$73,868
Total DAS Salaries and Benefits	\$342,307				\$80,024	\$80,024	\$80,024	\$80,024	\$320,096
HSA #2									

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage	\$200	\$200	\$200	\$200	\$800
Building Maintenance Supplies and Repair					
Printing and Reproduction	\$200	\$200	\$200	\$200	\$800
Insurance					
Staff Training	\$200	\$200	\$200	\$200	\$800
Staff Travel	\$100	\$100	\$100	\$100	\$400
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
Program Supplies	\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Food and Beverage	\$1,546	\$1,546	\$1,546	\$1,546	\$6,184
Entrance Fees	\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Bus Transportation	\$7,500	\$7,500	\$7,500	\$7,500	\$30,000
Total DAS Operating Expenses	\$12,146	\$12,146	\$12,146	\$12,146	\$48,584
HSA #3					

APPENDIX F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse); Chinatown YMCA (Broadway Cove)
 FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

PHONE NO.: 415-242-7115

DIRECTOR: Danielle Fuentes

SITES: Name of Site	Stonestown Family YMCA Parkmerced	Mission YMCA	Stonestown Family YMCA Annex	Bayview Hunters Point YMCA	Huntersview
Address and Zip	3711 19 th Avenue San Francisco, CA 94132	4080 Mission St. San Francisco CA 94112	3150 20 th Avenue San Francisco, CA 94132	1601 Lane St, 94124	1101 Fairfax Ave, 94124
Phone Number	415-301-5309	415-586-6900	415-242-7135	415-822-7728	415-###-####
Fax Number	N/A		415-731-1456	415-822-7769	415-###-####
Neighborhood	District 7; Parkside	District 11	District 4; Parkside	Bayview	Bayview
Muni Line #s	M,K,28,28x,29, 18	14, 49, 23, N	M,K,28,28x,29, 18	T, 54, 44, 23	19, 54
Person in Charge	Danielle Fuentes	Karla Diaz	Danielle Fuentes	Tacing Parker	Tacing Parker
Site Manager	Anthony (Tony) Ortiz	Hazel Barry	Jazmin Aizpuru	Demetrius Durham	Nicole Yarbrough
Programs Offered at Site	Group Exercise, Social Programming, Lectures, etc	Group Exercise, Social Programming, workshops, art classes, 1 on 1 tech support, Congregate Meal Program, food pantry, & health screenings.	Group Exercise, Social Programming, Lectures, Computer Lab, Congregate Meal Program, Tax Assistance, etc	Lunch & Learn Group Exercise Excursions Volunteer Opportunities	Group Exercise Excursions Workshops
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	Monday, Tuesday, Thursday, Friday 9:30am- 5pm	Monday-Friday 8am-5pm *some programs extend past closed hours	Monday-Friday 8am-3pm *some programs extend past closed hours	M-F 8am-4pm Sa 8am-3:30pm	10am-5PM
Hours of <u>scheduled</u> programming	Monday, Tuesday, Thursday, Friday 10am- 5pm	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	10am-12pm & 1pm-3pm	10am-12pm
Total number of service days in FY	215 days; minus holidays or shutdown	265 days; minus holidays or shutdown	265 days; minus holidays or shutdown		
Days closed	Wednesday, Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Sunday	Saturday, Sunday (open some weekends)
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 F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse – Proposed Site); Chinatown YMCA (Broadway Cove)

FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

DIRECTOR: Danielle Fuentes

PHONE NO.: 415-242-7115

SITES: Name of Site	Buchanan YMCA	Richmond YMCA	Argonne Clubhouse	Chinatown YMCA	Broadway Cove
Address and Zip	1530 Buchanan Street San Francisco, CA 94115	360 18 th Avenue San Francisco, CA 94121	463 18 th Avenue San Francisco, CA 94121	865 Sacramento Street San Francisco, CA 94108	760 Front Street San Francisco, CA 94115
Phone Number	415-931-9622	415-666-9622	415-666-9622	415-576-9622	
Fax Number	N/A	N/A	N/A	N/A	N/A
Neighborhood	District 5-Western Addition	District 1-Richmond	District 1-Richmond	District 3-Chinatown	District 3-North Beach
Muni Line #s	2, 5,5R,22,38,38R	1,1X,2,5,5R,28,29,31,38, 38R	1,1X,2,5,5R,28,29,31,38, 38R	1,30,8,T	1,8,12
Person in Charge	Suzanne Medina	Danielle Fuentes	Danielle Fuentes	Andy Chu	Andy Chu
Site Manager	Joshua Pisciotta	Anthony (Tony) Ortiz	Anthony (Tony) Ortiz		
Programs Offered at Site	TBD if awarded: Group Exercise, Social Programming, Guest Speakers, Luncheons, enrichment activities, fieldtrips	Group Exercise, Social Programming, Lectures, Exercise Equipment, Sauna	Group Exercise, Social Programming	Group Exercise, Cooking Together, field trips, food bank, ESL classes, service connection, technology workshops, health and educational workshops, arts and crafts, bingo, celebration events	Group Exercise, service connection, technology workshops, arts and crafts, celebration events
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat (occasion) <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun
Hours Open	Monday-Friday 9am-5pm	Monday – Friday 5:30am to 9:00pm Saturday 7:30am -7:00 pm	TBD: proposed time	8am to 8pm	10 am to 5 pm
Hours of <u>scheduled</u> programming	Monday-Friday 9am-5pm	Monday-Friday 9am-5pm	Monday-Friday 9am- 12pm	Monday-Friday: 9am-2pm	Monday & Wednesday, 10am-12 pm
Total number of service days in FY	260 days; minus holidays or shutdown	250 days; minus holidays or shutdown	185 days; minus holidays or shutdown		
Days closed	Most Saturdays, Sunday, Holidays	Saturday, Sunday, Holidays (2 weeks in December)	185 days; minus holidays or shutdown	Sundays	Saturdays and Sundays
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
YMCA OF SAN FRANCISCO (Mission)

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	YMCA OF SAN FRANCISCO (Mission)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	300	300	300	300
Activity Scheduling	2,592	2,592	2,592	2,592
Translation Services	192	192	192	192
Social Services	700	700	700	700
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected

and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name YMCA (Mission)					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$91,879	\$91,879	\$91,879	\$91,879	\$367,516
Operating Expenses	\$2,478	\$2,478	\$2,478	\$2,478	\$9,912
Subtotal	\$94,357	\$94,357	\$94,357	\$94,357	\$377,428
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$14,153	\$14,153	\$14,153	\$14,153	\$56,612
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$108,510	\$108,510	\$108,510	\$108,510	\$434,040
DAS Revenues					
General Funds	\$108,510	\$108,510	\$108,510	\$108,510	\$434,040
Total DAS Revenue	\$108,510	\$108,510	\$108,510	\$108,510	\$434,040
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$108,510	\$108,510	\$108,510	\$108,510	\$434,040
Full Time Equivalent (FTE)	1.33	1.33	1.33	1.33	5.33
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)

DAS Salaries & Benefits	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	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Position Title									
Active Older Adult Coordinator	\$56,160	1.00	100%	1.00	\$56,160	\$56,160	\$56,160	\$56,160	\$224,640
Active Older Adult Program Leader	\$46,482	0.22	100%	0.22	\$10,226	\$10,226	\$10,226	\$10,226	\$40,904
Group Exercise Instructor	\$86,821	0.07	100%	0.07	\$6,340	\$6,340	\$6,340	\$6,340	\$25,360
Art Instructor	\$96,000	0.04	100%	0.04	\$3,840	\$3,840	\$3,840	\$3,840	\$15,360
Totals	\$285,463	1.33	400%	1.33	\$76,566	\$76,566	\$76,566	\$76,566	\$306,264
Fringe Benefits Rate	20%								
Employee Fringe Benefits	\$57,093				\$15,313	\$15,313	\$15,313	\$15,313	\$61,252
Total DAS Salaries and Benefits	\$342,556				\$91,879	\$91,879	\$91,879	\$91,879	\$367,516

HSA #2

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Staff Training					
Staff Travel					
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
Program Supplies	\$2,478	\$2,478	\$2,478	\$2,478	\$9,912
Total DAS Operating Expenses	\$2,478	\$2,478	\$2,478	\$2,478	\$9,912

HSA #3

APPENDIX F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse); Chinatown YMCA (Broadway Cove)
 FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

PHONE NO.: 415-242-7115

DIRECTOR: Danielle Fuentes

SITES: Name of Site	Stonestown Family YMCA Parkmerced	Mission YMCA	Stonestown Family YMCA Annex	Bayview Hunters Point YMCA	Huntersview
Address and Zip	3711 19 th Avenue San Francisco, CA 94132	4080 Mission St. San Francisco CA 94112	3150 20 th Avenue San Francisco, CA 94132	1601 Lane St, 94124	1101 Fairfax Ave, 94124
Phone Number	415-301-5309	415-586-6900	415-242-7135	415-822-7728	415-###-####
Fax Number	N/A		415-731-1456	415-822-7769	415-###-####
Neighborhood	District 7; Parkside	District 11	District 4; Parkside	Bayview	Bayview
Muni Line #s	M,K,28,28x,29, 18	14, 49, 23, N	M,K,28,28x,29, 18	T, 54, 44, 23	19, 54
Person in Charge	Danielle Fuentes	Karla Diaz	Danielle Fuentes	Tacing Parker	Tacing Parker
Site Manager	Anthony (Tony) Ortiz	Hazel Barry	Jazmin Aizpuru	Demetrius Durham	Nicole Yarbrough
Programs Offered at Site	Group Exercise, Social Programming, Lectures, etc	Group Exercise, Social Programming, workshops, art classes, 1 on 1 tech support, Congregate Meal Program, food pantry, & health screenings.	Group Exercise, Social Programming, Lectures, Computer Lab, Congregate Meal Program, Tax Assistance, etc	Lunch & Learn Group Exercise Excursions Volunteer Opportunities	Group Exercise Excursions Workshops
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	Monday, Tuesday, Thursday, Friday 9:30am- 5pm	Monday-Friday 8am-5pm *some programs extend past closed hours	Monday-Friday 8am-3pm *some programs extend past closed hours	M-F 8am-4pm Sa 8am-3:30pm	10am-5PM
Hours of <u>scheduled</u> programming	Monday, Tuesday, Thursday, Friday 10am- 5pm	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	10am-12pm & 1pm-3pm	10am-12pm
Total number of service days in FY	215 days; minus holidays or shutdown	265 days; minus holidays or shutdown	265 days; minus holidays or shutdown		
Days closed	Wednesday, Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Sunday	Saturday, Sunday (open some weekends)
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 F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse – Proposed Site); Chinatown YMCA (Broadway Cove)

FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

DIRECTOR: Danielle Fuentes

PHONE NO.: 415-242-7115

SITES: Name of Site	Buchanan YMCA	Richmond YMCA	Argonne Clubhouse	Chinatown YMCA	Broadway Cove
Address and Zip	1530 Buchanan Street San Francisco, CA 94115	360 18 th Avenue San Francisco, CA 94121	463 18 th Avenue San Francisco, CA 94121	865 Sacramento Street San Francisco, CA 94108	760 Front Street San Francisco, CA 94115
Phone Number	415-931-9622	415-666-9622	415-666-9622	415-576-9622	
Fax Number	N/A	N/A	N/A	N/A	N/A
Neighborhood	District 5-Western Addition	District 1-Richmond	District 1-Richmond	District 3-Chinatown	District 3-North Beach
Muni Line #s	2, 5,5R,22,38,38R	1,1X,2,5,5R,28,29,31,38, 38R	1,1X,2,5,5R,28,29,31,38, 38R	1,30,8,T	1,8,12
Person in Charge	Suzanne Medina	Danielle Fuentes	Danielle Fuentes	Andy Chu	Andy Chu
Site Manager	Joshua Pisciotta	Anthony (Tony) Ortiz	Anthony (Tony) Ortiz		
Programs Offered at Site	TBD if awarded: Group Exercise, Social Programming, Guest Speakers, Luncheons, enrichment activities, fieldtrips	Group Exercise, Social Programming, Lectures, Exercise Equipment, Sauna	Group Exercise, Social Programming	Group Exercise, Cooking Together, field trips, food bank, ESL classes, service connection, technology workshops, health and educational workshops, arts and crafts, bingo, celebration events	Group Exercise, service connection, technology workshops, arts and crafts, celebration events
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat (occasion) <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun
Hours Open	Monday-Friday 9am-5pm	Monday – Friday 5:30am to 9:00pm Saturday 7:30am -7:00 pm	TBD: proposed time	8am to 8pm	10 am to 5 pm
Hours of <u>scheduled</u> programming	Monday-Friday 9am-5pm	Monday-Friday 9am-5pm	Monday-Friday 9am- 12pm	Monday-Friday: 9am-2pm	Monday & Wednesday, 10am-12 pm
Total number of service days in FY	260 days; minus holidays or shutdown	250 days; minus holidays or shutdown	185 days; minus holidays or shutdown		
Days closed	Most Saturdays, Sunday, Holidays	Saturday, Sunday, Holidays (2 weeks in December)	185 days; minus holidays or shutdown	Sundays	Saturdays and Sundays
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
YMCA OF SAN FRANCISCO (Parkmerced)

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	YMCA OF SAN FRANCISCO (Parkmerced)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	175	175	175	175
Activity Scheduling	750	750	750	750
Translation Services	120	120	120	120
Social Services	150	150	150	150
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on

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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name YMCA (Parkmerced)					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$86,095	\$86,095	\$86,095	\$86,095	\$344,380
Operating Expenses	\$9,988	\$9,988	\$9,988	\$9,988	\$39,952
Subtotal	\$96,083	\$96,083	\$96,083	\$96,083	\$384,332
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$14,412	\$14,412	\$14,412	\$14,412	\$57,648
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$110,495	\$110,495	\$110,495	\$110,495	\$441,980
DAS Revenues					
General Funds	\$110,495	\$110,495	\$110,495	\$110,495	\$441,980
Total DAS Revenue	\$110,495	\$110,495	\$110,495	\$110,495	\$441,980
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$110,495	\$110,495	\$110,495	\$110,495	\$441,980
Full Time Equivalent (FTE)	1.15	1.15	1.15	1.15	4.61
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)									
DAS Salaries & Benefits	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
Position Title	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
District Director	\$94,145	0.15	100%	0.15	\$14,122	\$14,122	\$14,122	\$14,122	\$56,488
Coordinator	\$56,784	0.25	100%	0.25	\$14,196	\$14,196	\$14,196	\$14,196	\$56,784
Group Exercise	\$84,968	0.15	100%	0.15	\$12,839	\$12,839	\$12,839	\$12,839	\$51,356
Program Lead	\$45,760	0.60	100%	0.60	\$27,538	\$27,538	\$27,538	\$27,538	\$110,152
Totals	\$281,657	1.15	400%	1.15	\$68,695	\$68,695	\$68,695	\$68,695	\$274,780
Fringe Benefits Rate	25%								
Employee Fringe Benefits	\$71,344				\$17,400	\$17,400	\$17,400	\$17,400	\$69,600
Total DAS Salaries and Benefits	\$353,001				\$86,095	\$86,095	\$86,095	\$86,095	\$344,380

HSA #2

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Staff Training					
Staff Travel					
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
Food and Beverage	\$2,883	\$2,883	\$2,883	\$2,883	\$11,532
Bus Transportation	\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Program Supplies	\$4,000	\$4,000	\$4,000	\$4,000	\$16,000
Licenses and Fees	\$1,105	\$1,105	\$1,105	\$1,105	\$4,420
Total DAS Operating Expenses	\$9,988	\$9,988	\$9,988	\$9,988	\$39,952

HSA #3

APPENDIX F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse); Chinatown YMCA (Broadway Cove)
 FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

PHONE NO.: 415-242-7115

DIRECTOR: Danielle Fuentes

SITES: Name of Site	Stonestown Family YMCA Parkmerced	Mission YMCA	Stonestown Family YMCA Annex	Bayview Hunters Point YMCA	Huntersview
Address and Zip	3711 19 th Avenue San Francisco, CA 94132	4080 Mission St. San Francisco CA 94112	3150 20 th Avenue San Francisco, CA 94132	1601 Lane St, 94124	1101 Fairfax Ave, 94124
Phone Number	415-301-5309	415-586-6900	415-242-7135	415-822-7728	415-###-####
Fax Number	N/A		415-731-1456	415-822-7769	415-###-####
Neighborhood	District 7; Parkside	District 11	District 4; Parkside	Bayview	Bayview
Muni Line #s	M,K,28,28x,29, 18	14, 49, 23, N	M,K,28,28x,29, 18	T, 54, 44, 23	19, 54
Person in Charge	Danielle Fuentes	Karla Diaz	Danielle Fuentes	Tacing Parker	Tacing Parker
Site Manager	Anthony (Tony) Ortiz	Hazel Barry	Jazmin Aizpuru	Demetrius Durham	Nicole Yarbrough
Programs Offered at Site	Group Exercise, Social Programming, Lectures, etc	Group Exercise, Social Programming, workshops, art classes, 1 on 1 tech support, Congregate Meal Program, food pantry, & health screenings.	Group Exercise, Social Programming, Lectures, Computer Lab, Congregate Meal Program, Tax Assistance, etc	Lunch & Learn Group Exercise Excursions Volunteer Opportunities	Group Exercise Excursions Workshops
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	Monday, Tuesday, Thursday, Friday 9:30am- 5pm	Monday-Friday 8am-5pm *some programs extend past closed hours	Monday-Friday 8am-3pm *some programs extend past closed hours	M-F 8am-4pm Sa 8am-3:30pm	10am-5PM
Hours of <u>scheduled</u> programming	Monday, Tuesday, Thursday, Friday 10am- 5pm	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	10am-12pm & 1pm-3pm	10am-12pm
Total number of service days in FY	215 days; minus holidays or shutdown	265 days; minus holidays or shutdown	265 days; minus holidays or shutdown		
Days closed	Wednesday, Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Sunday	Saturday, Sunday (open some weekends)
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 F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse – Proposed Site); Chinatown YMCA (Broadway Cove)

FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

DIRECTOR: Danielle Fuentes

PHONE NO.: 415-242-7115

SITES: Name of Site	Buchanan YMCA	Richmond YMCA	Argonne Clubhouse	Chinatown YMCA	Broadway Cove
Address and Zip	1530 Buchanan Street San Francisco, CA 94115	360 18 th Avenue San Francisco, CA 94121	463 18 th Avenue San Francisco, CA 94121	865 Sacramento Street San Francisco, CA 94108	760 Front Street San Francisco, CA 94115
Phone Number	415-931-9622	415-666-9622	415-666-9622	415-576-9622	
Fax Number	N/A	N/A	N/A	N/A	N/A
Neighborhood	District 5-Western Addition	District 1-Richmond	District 1-Richmond	District 3-Chinatown	District 3-North Beach
Muni Line #s	2, 5,5R,22,38,38R	1,1X,2,5,5R,28,29,31,38, 38R	1,1X,2,5,5R,28,29,31,38, 38R	1,30,8,T	1,8,12
Person in Charge	Suzanne Medina	Danielle Fuentes	Danielle Fuentes	Andy Chu	Andy Chu
Site Manager	Joshua Pisciotta	Anthony (Tony) Ortiz	Anthony (Tony) Ortiz		
Programs Offered at Site	TBD if awarded: Group Exercise, Social Programming, Guest Speakers, Luncheons, enrichment activities, fieldtrips	Group Exercise, Social Programming, Lectures, Exercise Equipment, Sauna	Group Exercise, Social Programming	Group Exercise, Cooking Together, field trips, food bank, ESL classes, service connection, technology workshops, health and educational workshops, arts and crafts, bingo, celebration events	Group Exercise, service connection, technology workshops, arts and crafts, celebration events
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat (occasion) <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun
Hours Open	Monday-Friday 9am-5pm	Monday – Friday 5:30am to 9:00pm Saturday 7:30am -7:00 pm	TBD: proposed time	8am to 8pm	10 am to 5 pm
Hours of <u>scheduled</u> programming	Monday-Friday 9am-5pm	Monday-Friday 9am-5pm	Monday-Friday 9am- 12pm	Monday-Friday: 9am-2pm	Monday & Wednesday, 10am-12 pm
Total number of service days in FY	260 days; minus holidays or shutdown	250 days; minus holidays or shutdown	185 days; minus holidays or shutdown		
Days closed	Most Saturdays, Sunday, Holidays	Saturday, Sunday, Holidays (2 weeks in December)	185 days; minus holidays or shutdown	Sundays	Saturdays and Sundays
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
YMCA OF SAN FRANCISCO (Richmond)

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	YMCA OF SAN FRANCISCO (Richmond)
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.

SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations,

workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	200	200	2002	200
Activity Scheduling	900	900	900	900
Translation Services	25	25	25	25
Social Services	150	150	150	150
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served

- Number and type of service units provided
4. 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.
 5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
 6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
 7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
 8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
 9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
 10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
 11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
 12. 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.
 13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
 14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted

mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name YMCA (Richmond)					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$93,797	\$93,797	\$93,797	\$93,797	\$375,188
Operating Expenses	\$32,474	\$32,474	\$32,474	\$32,474	\$129,896
Subtotal	\$126,271	\$126,271	\$126,271	\$126,271	\$505,084
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$18,941	\$18,941	\$18,941	\$18,941	\$75,764
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$145,212	\$145,212	\$145,212	\$145,212	\$580,848
DAS Revenues					
General Funds	\$145,212	\$145,212	\$145,212	\$145,212	\$580,848
Total DAS Revenue	\$145,212	\$145,212	\$145,212	\$145,212	\$580,848
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$145,212	\$145,212	\$145,212	\$145,212	\$580,848
Full Time Equivalent (FTE)	1.05	1.05	1.05	1.05	4.20
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)									
DAS Salaries & Benefits	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
Position Title	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
District Director	\$94,145	0.20	100%	0.20	\$18,829	\$18,829	\$18,829	\$18,829	\$75,316
Coordinator	\$56,784	0.75	100%	0.75	\$42,588	\$42,588	\$42,588	\$42,588	\$170,352
Group Exercise	\$84,968	0.10	100%	0.10	\$8,497	\$8,497	\$8,497	\$8,497	\$33,988
Totals	\$235,897	1.05	300%	1.05	\$69,914	\$69,914	\$69,914	\$69,914	\$279,656
Fringe Benefits Rate	34%								
Employee Fringe Benefits	\$80,582				\$23,883	\$23,883	\$23,883	\$23,883	\$95,532
Total DAS Salaries and Benefits	\$316,479				\$93,797	\$93,797	\$93,797	\$93,797	\$375,188
HSA #2									

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property	\$5,296	\$5,296	\$5,296	\$5,296	\$21,184
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$300	\$300	\$300	\$300	\$1,200
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance	\$1,452	\$1,452	\$1,452	\$1,452	\$5,808
Staff Training					
Staff Travel					
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
Bus Transportation	\$3,600	\$3,600	\$3,600	\$3,600	\$14,400
Food & Beverage	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Program Supplies	\$4,826	\$4,826	\$4,826	\$4,826	\$19,304
Entrance Fees	\$7,000	\$7,000	\$7,000	\$7,000	\$28,000
Community Workshops	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Total DAS Operating Expenses	\$32,474	\$32,474	\$32,474	\$32,474	\$129,896

HSA #3

APPENDIX F - SITE CHART

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

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 FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

PHONE NO.: 415-242-7115

DIRECTOR: Danielle Fuentes

SITES: Name of Site	Stonestown Family YMCA Parkmerced	Mission YMCA	Stonestown Family YMCA Annex	Bayview Hunters Point YMCA	Huntersview
Address and Zip	3711 19 th Avenue San Francisco, CA 94132	4080 Mission St. San Francisco CA 94112	3150 20 th Avenue San Francisco, CA 94132	1601 Lane St, 94124	1101 Fairfax Ave, 94124
Phone Number	415-301-5309	415-586-6900	415-242-7135	415-822-7728	415-###-####
Fax Number	N/A		415-731-1456	415-822-7769	415-###-####
Neighborhood	District 7; Parkside	District 11	District 4; Parkside	Bayview	Bayview
Muni Line #s	M,K,28,28x,29, 18	14, 49, 23, N	M,K,28,28x,29, 18	T, 54, 44, 23	19, 54
Person in Charge	Danielle Fuentes	Karla Diaz	Danielle Fuentes	Tacing Parker	Tacing Parker
Site Manager	Anthony (Tony) Ortiz	Hazel Barry	Jazmin Aizpuru	Demetrius Durham	Nicole Yarbrough
Programs Offered at Site	Group Exercise, Social Programming, Lectures, etc	Group Exercise, Social Programming, workshops, art classes, 1 on 1 tech support, Congregate Meal Program, food pantry, & health screenings.	Group Exercise, Social Programming, Lectures, Computer Lab, Congregate Meal Program, Tax Assistance, etc	Lunch & Learn Group Exercise Excursions Volunteer Opportunities	Group Exercise Excursions Workshops
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	Monday, Tuesday, Thursday, Friday 9:30am- 5pm	Monday-Friday 8am-5pm *some programs extend past closed hours	Monday-Friday 8am-3pm *some programs extend past closed hours	M-F 8am-4pm Sa 8am-3:30pm	10am-5PM
Hours of <u>scheduled</u> programming	Monday, Tuesday, Thursday, Friday 10am- 5pm	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	10am-12pm & 1pm-3pm	10am-12pm
Total number of service days in FY	215 days; minus holidays or shutdown	265 days; minus holidays or shutdown	265 days; minus holidays or shutdown		
Days closed	Wednesday, Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Sunday	Saturday, Sunday (open some weekends)
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

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Fax Number	N/A	N/A	N/A	N/A	N/A
Neighborhood	District 5-Western Addition	District 1-Richmond	District 1-Richmond	District 3-Chinatown	District 3-North Beach
Muni Line #s	2, 5,5R,22,38,38R	1,1X,2,5,5R,28,29,31,38, 38R	1,1X,2,5,5R,28,29,31,38, 38R	1,30,8,T	1,8,12
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Hours Open	Monday-Friday 9am-5pm	Monday – Friday 5:30am to 9:00pm Saturday 7:30am -7:00 pm	TBD: proposed time	8am to 8pm	10 am to 5 pm
Hours of <u>scheduled</u> programming	Monday-Friday 9am-5pm	Monday-Friday 9am-5pm	Monday-Friday 9am- 12pm	Monday-Friday: 9am-2pm	Monday & Wednesday, 10am-12 pm
Total number of service days in FY	260 days; minus holidays or shutdown	250 days; minus holidays or shutdown	185 days; minus holidays or shutdown		
Days closed	Most Saturdays, Sunday, Holidays	Saturday, Sunday, Holidays (2 weeks in December)	185 days; minus holidays or shutdown	Sundays	Saturdays and Sundays
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
YMCA OF SAN FRANCISCO (Stonestown)

Community Services

July 1, 2023 to June 30, 2027

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in San Francisco through site-based community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older 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, transfer, 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 On Line 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.
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	YMCA OF SAN FRANCISCO (Stonestown)
Higher Learning Classes	College-level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco's Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.

Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational,

and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are three categories of Community Services programming:

- i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
 - ii. Translation: Translation assistance is provided to consumers that cannot speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.
 - iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
2. Grantee will ensure that service offerings in the three categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At a minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer and adhere to all program standards.
 6. Grantee will ensure that units of service provided are tracked and distinguishable.
 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP and share the information with their staff and volunteers as needed.
 8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are

contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

9. Grantee will provide Higher Learning classes at Stonestown YMCA. The classes will be open to any older adult or adult with a disability interested. A participant will register for a class as a separate activity within the Community Services program. Course topics are “Mind-Body-Health”, “Principles of Balance”, “Quilting”, “Communications”, and “Lip Reading”. The classes are college-level classes taught by instructors with advanced degrees and teaching experience in the field of study.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	1,500	1,500	1,500	1,500
Activity Scheduling	2,500	2,500	2,500	2,500
Translation Services	120	120	120	120
Social Services	800	800	800	800
1 unit of service = 1 hour of service provision				

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

Higher Learning

1. Class participants report that the course increased their socialization opportunities and interaction with others. Target: 80%
2. Class participants report an increase in knowledge of the Higher Learning course topic. Target: 80%

Based on a satisfaction survey created by the grantee with input from DAS OCP and with a sample size of at least 75% of the participants enrolled in the class.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. 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.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. 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.

13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
reanna.albert@sfgov.org

and

Patrick Garcia
Contract Manager
HSA OCM
patrick.garcia@sfgov.org

X. Monitoring Activities

- A. **Program Monitoring**: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name YMCA (Stonestown)					Term 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: Community Services					
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
DAS Expenditures					
Salaries & Benefits	\$212,507	\$212,507	\$212,507	\$212,507	\$850,028
Operating Expenses	\$64,524	\$64,524	\$64,524	\$64,524	\$258,096
Subtotal	\$277,031	\$277,031	\$277,031	\$277,031	\$1,108,124
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$41,555	\$41,555	\$41,555	\$41,555	\$166,220
Capital/Subcontractor Expenditures					
Total DAS Expenditures	\$318,586	\$318,586	\$318,586	\$318,586	\$1,274,344
DAS Revenues					
General Funds	\$318,586	\$318,586	\$318,586	\$318,586	\$1,274,344
Total DAS Revenue	\$318,586	\$318,586	\$318,586	\$318,586	\$1,274,344
Non DAS Revenues					
Total Non DAS Revenue					
TOTAL DAS AND NON DAS REVENUE	\$318,586	\$318,586	\$318,586	\$318,586	\$1,274,344
Full Time Equivalent (FTE)	2.45	2.45	2.45	2.45	9.80
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)

DAS Salaries & Benefits	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	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
District Director	\$94,145	0.65	100%	0.65	\$61,194	\$61,194	\$61,194	\$61,194	\$244,776
Coordinator	\$49,920	1.00	100%	1.00	\$49,920	\$49,920	\$49,920	\$49,920	\$199,680
Group Exercise	\$88,442	0.25	100%	0.25	\$22,146	\$22,146	\$22,146	\$22,146	\$88,584
Administrative Assistant	\$48,152	0.55	100%	0.55	\$26,484	\$26,484	\$26,484	\$26,484	\$105,936
Totals	\$280,659	2.45	400%	2.45	\$159,744	\$159,744	\$159,744	\$159,744	\$638,976
Fringe Benefits Rate	33%								
Employee Fringe Benefits	\$92,702				\$52,763	\$52,763	\$52,763	\$52,763	\$211,052
Total DAS Salaries and Benefits	\$373,361				\$212,507	\$212,507	\$212,507	\$212,507	\$850,028
HSA #2									

Operating Expense Detail

	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) 7/1/23 - 6/30/27
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance	\$3,185	\$3,185	\$3,185	\$3,185	\$12,740
Staff Training					
Staff Travel					
Rental of Equipment					
<u>Consultants</u>					
Extended Learning Classes	\$43,680	\$43,680	\$43,680	\$43,680	\$174,720
<u>Other</u>					
Bus Transportation	\$3,600	\$3,600	\$3,600	\$3,600	\$14,400
Entrance Fee	\$2,500	\$2,500	\$2,500	\$2,500	\$10,000
Program Supplies	\$3,600	\$3,600	\$3,600	\$3,600	\$14,400
Food and Beverage	\$4,300	\$4,300	\$4,300	\$4,300	\$17,200
Community Workshops	\$2,459	\$2,459	\$2,459	\$2,459	\$9,836
Total DAS Operating Expenses	\$64,524	\$64,524	\$64,524	\$64,524	\$258,096

HSA #3

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships
 AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse); Chinatown YMCA (Broadway Cove)
 07/2023-06/2027

FISCAL YEAR:

CONTRACT: Community Services RFP 1060

PHONE NO.: 415-242-7115

DIRECTOR: Danielle Fuentes

SITES: Name of Site	Stonestown Family YMCA Parkmerced	Mission YMCA	Stonestown Family YMCA Annex	Bayview Hunters Point YMCA	Huntersview
Address and Zip	3711 19 th Avenue San Francisco, CA 94132	4080 Mission St. San Francisco CA 94112	3150 20 th Avenue San Francisco, CA 94132	1601 Lane St, 94124	1101 Fairfax Ave, 94124
Phone Number	415-301-5309	415-586-6900	415-242-7135	415-822-7728	415-###-####
Fax Number	N/A		415-731-1456	415-822-7769	415-###-####
Neighborhood	District 7; Parkside	District 11	District 4; Parkside	Bayview	Bayview
Muni Line #s	M,K,28,28x,29, 18	14, 49, 23, N	M,K,28,28x,29, 18	T, 54, 44, 23	19, 54
Person in Charge	Danielle Fuentes	Karla Diaz	Danielle Fuentes	Tacing Parker	Tacing Parker
Site Manager	Anthony (Tony) Ortiz	Hazel Barry	Jazmin Aizpuru	Demetrius Durham	Nicole Yarbrough
Programs Offered at Site	Group Exercise, Social Programming, Lectures, etc	Group Exercise, Social Programming, workshops, art classes, 1 on 1 tech support, Congregate Meal Program, food pantry, & health screenings.	Group Exercise, Social Programming, Lectures, Computer Lab, Congregate Meal Program, Tax Assistance, etc	Lunch & Learn Group Exercise Excursions Volunteer Opportunities	Group Exercise Excursions Workshops
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	Monday, Tuesday, Thursday, Friday 9:30am- 5pm	Monday-Friday 8am-5pm *some programs extend past closed hours	Monday-Friday 8am-3pm *some programs extend past closed hours	M-F 8am-4pm Sa 8am-3:30pm	10am-5PM
Hours of <u>scheduled</u> programming	Monday, Tuesday, Thursday, Friday 10am- 5pm	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	Monday-Friday 8:30am- 3pm *some programs extend past closed hours	10am-12pm & 1pm-3pm	10am-12pm
Total number of service days in FY	215 days; minus holidays or shutdown	265 days; minus holidays or shutdown	265 days; minus holidays or shutdown		
Days closed	Wednesday, Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Saturday, Sunday, Holidays	Sunday	Saturday, Sunday (open some weekends)
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 F - SITE CHART

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

AGENCY: YMCA of San Francisco - Stonestown Family YMCA Parkmerced; Mission YMCA; Stonestown Family YMCA Annex; Bayview Hunters Point YMCA (Huntersview); Buchanan YMCA Main Facility; Richmond District YMCA Main Facility (Argonne Clubhouse – Proposed Site); Chinatown YMCA (Broadway Cove)

FISCAL YEAR: 07/2023-06/2027

CONTRACT: Community Services RFP 1060

DIRECTOR: Danielle Fuentes

PHONE NO.: 415-242-7115

SITES: Name of Site	Buchanan YMCA	Richmond YMCA	Argonne Clubhouse	Chinatown YMCA	Broadway Cove
Address and Zip	1530 Buchanan Street San Francisco, CA 94115	360 18 th Avenue San Francisco, CA 94121	463 18 th Avenue San Francisco, CA 94121	865 Sacramento Street San Francisco, CA 94108	760 Front Street San Francisco, CA 94115
Phone Number	415-931-9622	415-666-9622	415-666-9622	415-576-9622	
Fax Number	N/A	N/A	N/A	N/A	N/A
Neighborhood	District 5-Western Addition	District 1-Richmond	District 1-Richmond	District 3-Chinatown	District 3-North Beach
Muni Line #s	2, 5,5R,22,38,38R	1,1X,2,5,5R,28,29,31,38, 38R	1,1X,2,5,5R,28,29,31,38, 38R	1,30,8,T	1,8,12
Person in Charge	Suzanne Medina	Danielle Fuentes	Danielle Fuentes	Andy Chu	Andy Chu
Site Manager	Joshua Pisciotta	Anthony (Tony) Ortiz	Anthony (Tony) Ortiz		
Programs Offered at Site	TBD if awarded: Group Exercise, Social Programming, Guest Speakers, Luncheons, enrichment activities, fieldtrips	Group Exercise, Social Programming, Lectures, Exercise Equipment, Sauna	Group Exercise, Social Programming	Group Exercise, Cooking Together, field trips, food bank, ESL classes, service connection, technology workshops, health and educational workshops, arts and crafts, bingo, celebration events	Group Exercise, service connection, technology workshops, arts and crafts, celebration events
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat (occasion) <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri Sat <input type="checkbox"/> Sun
Hours Open	Monday-Friday 9am-5pm	Monday – Friday 5:30am to 9:00pm Saturday 7:30am -7:00 pm	TBD: proposed time	8am to 8pm	10 am to 5 pm
Hours of <u>scheduled</u> programming	Monday-Friday 9am-5pm	Monday-Friday 9am-5pm	Monday-Friday 9am- 12pm	Monday-Friday: 9am-2pm	Monday & Wednesday, 10am-12 pm
Total number of service days in FY	260 days; minus holidays or shutdown	250 days; minus holidays or shutdown	185 days; minus holidays or shutdown		
Days closed	Most Saturdays, Sunday, Holidays	Saturday, Sunday, Holidays (2 weeks in December)	185 days; minus holidays or shutdown	Sundays	Saturdays and Sundays
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