



Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

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London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DATE: WEDNESDAY, SEPTEMBER 6, 2023

SUBJECT: GRANT MODIFICATION: TOOLWORKS (NON-PROFIT) FOR PROVISION OF AGING AND DISABILITY RESOURCE CENTER

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	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
GRANT TERM:	01/01/21- 06/30/24	09/01/23- 6/30/24	01/01/21- 06/30/24		
GRANT AMOUNT:	\$243,849	\$40,000	\$283,849	\$28,385	\$312,234
ANNUAL AMOUNT:	<u>FY 21</u>	<u>FY 21/22</u>	<u>FY 22/23</u>	<u>FY 23/24</u>	
	\$32,434	\$68,641	\$71,387	\$111,387	
Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
MODIFICATION FUNDING:	\$261,703		\$22,146	\$28,385	\$312,234
PERCENTAGE:	92%		8%		100%

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant agreement with Toolworks Inc. for the period of September 1, 2023 through June 30, 2024, in the additional amount of \$40,000 plus a 10% contingency for a revised total amount not to exceed \$312,234. The purpose of this modification is to add additional dollars to the Aging and Disability Resource Center (ADRC) program to maintain current levels of services.

Background

The Aging and Disability Resource Center serves as a one-stop shop for information, referral, assistance, and translation services throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. Specifically, ADRCs around the City provide services that assist people to continue living independently in the community, connecting them with long-term services and supports. ADRCs are located throughout the City and each ADRC has trained staff and on-site supervisors.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts in San Francisco. Some districts have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. There are two citywide ADRCs, one specializing in serving the disability community and the other specializing in serving the LGBTQ+ community. Each ADRC must demonstrate the capability to serve older people and adults with disabilities in their supervisory district and neighboring districts, if applicable.

Services to be Provided

The ADRC provides one-stop shop access to information, referral, assistance, and translation services for older people, adults with disabilities, and caregivers at key neighborhood locations. ADRC staff work in multiple sites which are already hubs for older people and adults with disabilities accessing other services. The ADRC staff provide services a minimum of 5 days a week. An additional Citywide ADRC Coordinator meets with staff employed by ADRC sites on a weekly and monthly basis. This coordinator is responsible for providing training, clinical consultation, and executing an outreach plan for the ADRC sites. The Citywide ADRC Coordinator and on-site supervisor meet monthly to avoid any issues of dual consultation/support.

Toolworks ADRC is one of two citywide ADRCs and specializes in providing services to adults with disabilities. Under this modification, Toolworks ADRC will continue to provide services at current functioning levels. The additional funds are needed to meet ongoing operating expenses of the program, including staff salaries and rent.

Selection

Grantee was selected through Request for Proposals (RFP) #874 which was competitively bid in September 2020.

Funding

Funding for this grant agreement is provided through a combination of Federal and General Funds.

ATTACHMENTS

Appendix A-1, Scope of Services

Appendix B-1, Budget

**APPENDIX A-1 – SERVICES TO BE PROVIDED
TOOLWORKS
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: September 1, 2023**

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	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, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage their 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
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
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 sex assigned at birth. 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 clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Socially Isolated	Having few social relationships and few people to interact with regularly.
Senior/Older Adult	Person who is 60 years of age or older

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 needs:

- Persons with low-income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color

- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. **Location and Time of Services**

Services will take place at Toolworks, Inc., 25 Kearny Street, #400, San Francisco, CA, 94108. Hours of operation are from 8:30am-4:30pm, Monday to Friday.

V. **Description of Services**

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.
- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.

- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF DAS GetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Toolworks ADRC:

- Will serve the following unduplicated older adults:
180 in FY 20/21
360 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
420 in FY 20/21
840 in FY 21/22-FY 23/24
- Will provide the following units of information and referral services:
775 in FY 20/21
1550 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
808 in FY 20/21
1616 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
228 in FY 20/21
457 in FY 21/22-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an

unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.

- B.** Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** 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.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg
Program Analyst
Department of Disability and Aging Services
Sara.Hofverberg@SFgov.org

Patrick Garcia
Contract Manager
Human Services Agency
Patrick.Garcia@SFgov.org

IX. Monitoring Activities

- A.** Program Monitoring: Program monitoring will include review of compliance 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; 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 V and VI.
- 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 Toolworks							Term 1/1/21 - 6/30/24
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>							
If modification, Effective Date of Mod. 9/1/23 No. of Mod. 1							
Program: Aging and Disability Resource Center (ADRC)							
Budget Reference Page No.(s)							
					(Modification)		(Total)
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	9/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Expenditures							
Salaries & Benefits	\$32,434	\$67,566	\$71,387	\$71,387	\$19,359	\$90,746	\$262,133
Operating Expenses					\$20,641	\$20,641	\$20,641
Subtotal	\$32,434	\$67,566	\$71,387	\$71,387	\$40,000	\$111,387	\$282,774
Indirect Percentage (%)		2%					2%
Indirect Cost (Line 16 X Line 15)		\$1,075					\$1,075
Subcontractor/Capital Expenditures							
Total Expenditures	\$32,434	\$68,641	\$71,387	\$71,387	\$40,000	\$111,387	\$283,849
HSA Revenues							
Federal Funds (CDFA 93.778)	\$3,006	\$6,380	\$6,380	\$6,380		\$6,380	\$22,146
General Funds	\$27,052	\$57,417	\$57,417	\$57,417	\$40,000	\$97,417	\$239,303
CODB	\$1,801	\$3,769	\$6,515	\$6,515		\$6,515	\$18,600
MCO	\$575	\$1,075	\$1,075	\$1,075		\$1,075	\$3,800
TOTAL HSA REVENUES	\$32,434	\$68,641	\$71,387	\$71,387	\$40,000	\$111,387	\$283,849
Other Revenues							
Total Revenues	\$32,434	\$68,641	\$71,387	\$71,387	\$40,000	\$111,387	\$283,849
Full Time Equivalent (FTE)							
Prepared by: Sarah Burgett							
HSA-CO Review Signature:							
HSA #1							

Program: Aging and Disability Resource Center (ADRC)

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		1/1/21 - 6/30/21	Agency Totals		HSA Program		7/1/21 - 6/30/22	Agency Totals		HSA Program		7/1/22 - 6/30/23	Agency Totals		HSA Program		7/1/23 - 6/30/24	(Modification)		(Total)	
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Salary	DAS Salary	DAS Salary	DAS Salary	DAS Salary
I&A Specialist	\$45,095	1.00	43%	0.43	\$19,516	\$48,864	1.00	100%	1.00	\$48,864	\$52,242	1.00	100%	1.00	\$52,242	\$57,235	1.00	100%	1.00	\$52,242	\$4,993	\$57,235	\$177,857	
Director, Community Living	\$76,300	1.00	4%	0.04	\$3,200	\$76,300	1.00	10%	0.10	\$7,630	\$76,300	1.00	10%	0.10	\$7,630	\$91,936	1.00	20%	0.20	\$7,630	\$10,757	\$18,387	\$36,847	
Director (Fulfilling I&R Role) (Jan - Feb 21, May - June 21)	\$76,300	1.00	8%	0.08	\$6,426																			\$6,426
VP services (Director, Community Living) (Jan - Feb 21, May - June 21)	\$120,000	1.00	1%	0.01	\$683																			\$683
TOTALS	\$317,695	4.00	56%	0.56	\$29,825	\$125,164	2.00	110%	1.10	\$56,494	\$128,542	2.00	110%	1.10	\$59,872	\$149,171	2.00	120%	1.20	\$59,872	\$15,750	\$75,622	\$221,813	
FRINGE BENEFIT RATE	9%				20%				19%				20%				19%							
EMPLOYEE FRINGE BENEFITS	\$27,789				\$2,609	\$24,531				\$11,072	\$25,193				\$11,515	\$29,236				\$11,515	\$3,609	\$15,124	\$40,320	
TOTAL SALARIES & BENEFITS	\$345,484				\$32,434	\$149,695				\$67,566	\$153,735				\$71,387	\$178,407				\$71,387	\$19,359	\$90,746	\$262,133	
HSA #2																								

Toolworks

Program: Aging and Disability Resource Center (ADRC)

Operating Expense Detail

<u>Expenditure Category</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	(Modification) 9/1/23 - 6/30/24	7/1/23 - 6/30/24	(Total) 1/1/21 - 6/30/24
Rental of Property					\$20,641	\$20,641	\$20,641
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							
TOTAL OPERATING EXPENSES					\$20,641	\$20,641	\$20,641

HSA #3