



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

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



London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO: HUMAN SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DATE: OCTOBER 4, 2023

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

DS
EL

| | <u>Current</u> | <u>Modification</u> | <u>Revised</u> | <u>Contingency</u> | <u>Total</u> |
|-----------------------|-----------------------|----------------------|-----------------------|--------------------|--------------|
| GRANT TERM: | 07/01/23- 06/30/27 | 10/01/23- 6/30/27 | 07/01/23- 06/30/27 | | |
| GRANT AMOUNT: | \$2,636,000 | \$404,000 | \$3,040,000 | \$304,000 | 3,344,000 |
| ANNUAL AMOUNT: | <u>FY 23/24</u> | <u>FY 24/25</u> | <u>FY 25/26</u> | <u>FY 26/27</u> | |
| | \$760,000 | \$760,000 | \$760,000 | \$760,000 | |
| Funding Source | <u>County</u> | <u>State</u> | <u>Federal</u> | <u>Contingency</u> | <u>Total</u> |
| MODIFICATION | | | | | |
| FUNDING: | \$3,040,000 | | | \$304,000 | 3,344,000 |
| PERCENTAGE: | 100% | | | | 100% |

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant agreement with Self-Help for the Elderly for the period of October 1, 2023 to June 30, 2027, in an additional amount of \$404,000, plus a 10% contingency for a total amount not to exceed \$3,344,000. The purpose of this modification is to provide escort services to older adults and adults with disabilities for activities to ensure safety on San Francisco streets.



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Background

In light of the events that have occurred and threats against the Asian-American Pacific Islander community and older adult and adults with disabilities in general, there is a need for escort services to seniors and people with disabilities to provide protection. Funding was identified to provide these services through Self-Help for the Elderly.

Services to be Provided

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

Modification

Additional funding for this grant has been provided by the Mayor's office beginning with the current fiscal year and ongoing through the term of the contract. The additional funding through this modification will increase the number of escort services to be provided; from 5,000 to 5,750 for the current fiscal year (FY23-24) and 6,000 per year for the remaining three years of the contract. It will also support salary increases for the Program Coordinator, Volunteer Coordinator, Senior Escort Driver, and Senior Escort. A portion of the funding will be used to pay for rental, insurance, staff travel and transportation costs, communication, and expenses related to recruitment of escorts.

Selection

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

Funding

Funding for this grant is provided through County General Funds.

ATTACHMENTS

Appendix A1 – Services to be Provided



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Appendix B1 – Budget

Appendix A1 – Services to be Provided
Self-Help for the Elderly
Senior Escort Services Program
July 1, 2023 – June 30, 2027
Modified October 3, 2023

I. Purpose of Grant

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

II. Definitions

| | |
|---------------------------------|--|
| Adult Protective Services (APS) | The unit within DAS that accepts and responds to reports of abuse, neglect, exploitation, and self-neglect involving older adults and adults with disabilities. (https://www.sfhsa.org/services/protection-safety/adult-abuse) |
| Adult with a Disability | A person who is 18 to 59 years of age living with a disability |
| CARBON | Contracts Administration, Reporting and Billing Online System. |
| City | City and County of San Francisco, a municipal corporation |
| Communities of Color | An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism |
| Controller | Controllers of the City and County of San Francisco or designated agent |
| DAS | Department of Disability and Aging Services |
| DAS Benefits and Resource Hub | Unit within DAS that is equipped to receive calls, requests, and drop-ins from the community and provide information, referrals, and assistance for older adults and adults with disabilities, caregivers, and community-based organizations (https://www.sfhsa.org/contact/locations/das-benefits-and-resources-hub) |
| Dignity Fund | The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities |

| | |
|----------------|---|
| Disability | A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment |
| Grantee | Self-Help for the Elderly |
| LGBTQ+ | An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex; this includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary |
| Low Income | Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program |
| DFOAC | Dignity Fund Oversight and Advisory Committee |
| OCM | Office of Contract Management, Human Services Agency |
| Older Adult | Person who is 60 years or older, used interchangeably with senior. |
| Senior | Person who is 60 years or older, used interchangeably with older adult. |
| SF DAS GetCare | A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc. |
| SFHSA | Human Services Agency of the City and County of San Francisco |
| SOGI | Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.) |

III. Target Population

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

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

IV. Client Eligibility

To be eligible for services, clients must be:

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

V. Description of Services

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

5. Grantee will have a written and active outreach and recruitment plan to connect with the target population and ensure that the target population priorities are included in the plan.
6. Grantee will track and record the units of service provided through this grant agreement and ensure that units of service provided are not “co-mingled” with other DAS funded programs.
7. Grantee will develop and implement an evaluation process whereby clients are able to provide feedback to the Grantee on the escort services provided by escort staff. The Grantee will provide DAS with a quarterly summary of the evaluation and feedback received.
8. Grantee will conduct meetings, scheduled at least quarterly, with all escort staff to exchange program and service information between the escort staff, the Grantee, and DAS. The meetings will also provide opportunity for escort staff to share their experiences, accomplishments, and troubleshoot any barriers encountered in the community.
9. Grantee will have readily available resources that escort staff can access as needed to help and support them in their role and provide best practices and suggestions when providing Senior Escort Services in the community.
10. Grantee agrees to meet on a quarterly basis or as needed with DAS to ensure consistent messaging about DAS programs and services, foster information exchange, and troubleshoot any issues that emerge as it relates to the Senior Escort Services program.
11. Grantee shall ensure adequate and culturally competent paid and volunteer staffing to administer the program, deliver quality services to meet the needs of the client participants, and adhere to all DAS program standards.
12. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules as needed.
13. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAS policy memoranda manual.

VI. Location and Time of Services

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

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

VII. Service Objectives

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

| | FY 2023- 2024 | FY 2024- 2025 | FY 2025- 2026 | FY 2026- 2027 |
|---|---------------------|---------------------|---------------------|---------------------|
| Unduplicated older adults and adults with disabilities. | 575 | 600 | 600 | 600 |
| Outreach activities. (An escort stationing themselves at a high traffic location, such as a senior center or library, in order to share information about Senior Escort Services is considered an outreach activity. Each outreach activity must be a minimum of one hour.) | 50 | 50 | 50 | 50 |
| Escort Services. (Escort services with multiple clients will count as one escort service per client, per one-way trip. A round-trip escort is considered two escorts.) | 5750 | 6000 | 6000 | 6000 |

VIII. Outcome Objectives

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

1. Escort requests will be provided timely (within 1 business day if requests are received at least 24 hours in advance). Target: 80%

2. Older adults using escort service report an increased feeling of safety.
Target: 80%
3. Older adults using escort services are satisfied with the services they received.
Target: 80%

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers, if applicable, into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAS provided or DAS approved intake form into the SF DAS GetCare database in accordance to DAS policy.
3. Grantee will enter into the SF DAS GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
 - Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VI and VII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual satisfaction survey report to DAS by March 15 each grant year or a mutually agreed upon date between DAS and the Grantee.
8. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAS.

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

Tahir.Shaikh@sfgov.org
Contract Manager, HSA
Office of Contract Management

or

Melissa.McGee@sfgov.org
Program Manager, DAS
Office of Community Partnerships

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; Senior Escort eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units; sign-in sheets of consumers who participated in services if applicable, progress of service and outcome objectives; how consumer records are collected and maintained if applicable; reporting performance including monthly service unit reports on SF DAS GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the elder abuse reporting, evidence that program staff have completed security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections III, IV, V, VI, VII, and VIII.
2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name _____

SELF-HELP FOR THE ELDERLY

(Check One) New Renewal Modification

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

Program: **Senior Escorts**

Budget Reference Page No.(s) _____

Program Term _____

| Expenditures | 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 |
|------------------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|--------------------|
| | Original Budget | Revised Budget | Original Budget | Revised Budget | Original Budget | Revised Budget | Original Budget | Revised Budget | |
| Salaries & Benefits | \$498,984 | \$556,710 | \$498,984 | \$556,710 | \$498,984 | \$556,710 | \$498,984 | \$556,710 | \$2,226,840 |
| Operating Expenses | \$74,060 | \$104,160 | \$74,060 | \$104,160 | \$74,060 | \$104,160 | \$74,060 | \$104,160 | \$416,640 |
| Subtotal | \$573,044 | \$660,870 | \$573,044 | \$660,870 | \$573,044 | \$660,870 | \$573,044 | \$660,870 | \$2,643,480 |
| Indirect Percentage (%) | 15% | 15% | 15% | 15% | 15% | 15% | 15% | 15% | 15% |
| Indirect Cost (Line 16 X Line 15) | \$85,956 | \$99,130 | \$85,956 | \$99,130 | \$85,956 | \$99,130 | \$85,956 | \$99,130 | \$396,520 |
| Subcontractor/Capital Expenditures | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Total Expenditures | \$659,000 | \$760,000 | \$659,000 | \$760,000 | \$659,000 | \$760,000 | \$659,000 | \$760,000 | \$3,040,000 |
| HSA Revenues | | | | | | | | | |
| General Funds | \$659,000 | \$101,000 | \$659,000 | \$101,000 | \$659,000 | \$101,000 | \$659,000 | \$101,000 | \$3,040,000 |
| TOTAL HSA REVENUES | \$659,000 | \$101,000 | \$659,000 | \$101,000 | \$659,000 | \$101,000 | \$659,000 | \$101,000 | \$3,040,000 |
| Other Revenues | | | | | | | | | |
| In-Kind Match-Volunteers | \$5,514 | \$5,514 | \$5,514 | \$5,514 | \$5,514 | \$5,514 | \$5,514 | \$5,514 | \$22,056 |
| Total Revenues | \$664,514 | \$106,514 | \$664,514 | \$106,514 | \$664,514 | \$106,514 | \$664,514 | \$106,514 | \$3,062,056 |

Full Time Equivalent (FTE) _____

Prepared by: Leny Nair

HSA-CO Review Signature: _____

HSA #1 _____

