



**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: JANUARY 10, 2024

SUBJECT: GRANT MODIFICATION: **STEPPINGSTONE (NON-PROFIT)**
FOR PROVISION OF LGBTQ+ COMMUNITY SERVICES
PROGRAM PILOT

	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
GRANT TERM:	7/1/22- 6/30/27	1/1/24- 6/30/27	7/1/22- 6/30/27		
GRANT AMOUNT:	\$1,020,217	\$185,962	\$1,206,179	\$120,618	\$1,326,797
ANNUAL AMOUNT:	<u>FY 22/23</u>	<u>FY 23/24</u>	<u>FY 24/25</u>	<u>FY 25/26</u>	<u>FY 26/27</u>
	\$235,519	\$242,665	\$242,665	\$242,665	\$242,665
Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
MODIFICATION	\$1,206,179			\$120,618	\$1,326,797
FUNDING:					
PERCENTAGE:	100%				100%



London Breed
Mayor

Trent Rhorer
Executive Director

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant agreement with SteppingStone for the period of January 1, 2024 through June 30, 2027, in the additional amount of \$185,962, plus a 10% contingency for a total amount not to exceed \$1,326,797. The purpose of this modification is to continue Higher Learning classes at SteppingStone centers and include the Cost of Doing Business adjustment (CODB).



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Background

Community service programs provide site-based services focused on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. The programming maintains or improves the well-being of individuals by providing activities and services designed to support them 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. Community service programming includes activity scheduling, enhanced outreach, social services, and translation services.

Services to be Provided

Through this LGBTQ+ Community Services Program Pilot grant, the grantee provides community services programming with activities and services designed to support LGBTQ+ participants and their caregivers, increase awareness of services available to them, and reduce barriers for engagement. Program staff are trained on LGBTQ+ history, cultural humility, and other topics to increase understanding of strengths and challenges facing LGBTQ+ populations. Grantee will also ensure the physical space of the community service site is safe and welcoming to LGBTQ+ participants.

In addition to community services programming, the grantee offers Higher Learning classes, which are college level classes that were part of City College of San Francisco's (CCSF) Older Adults program. These courses supplement traditional program activities and services funded by DAS. Currently, "Body Dynamics and the Aging Process" class is offered at the following Adult Day Health Centers: Golden Gate Adult Day Health Center, Mabini Adult Day Health Center, Mission Creek Adult Day Health Center, and Presentation Adult Day Health Center. These classes are taught by a City College of San Francisco instructor with an advanced degree and experience in the field of study. Participants will register separately for these classes and learn strategies for safely implementing a physical activity program, techniques for stress reduction, and understanding key healthy aging concepts to maintain and improve overall health and well-being.

Modification

The purpose of this modification is to provide funding to support Higher Learning classes in the amount of \$44,965 annually and include the Cost



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of Doing Business (CODB) adjustment of 3.75%. Funding will be added for this program for the period of January 1, 2024, through June 30, 2027.

Selection

Grantee was selected through Request for Proposals #1016, which was competitively bid in April 2022.

Funding

Funding for this grant is provided through County General Funds.

ATTACHMENTS

Appendix A-1, Scope of Services

Appendix B-1, Budget

APPENDIX A-1 – SERVICES TO BE PROVIDED STEPPINGSTONE

July 1, 2022 – June 30, 2027
LGBTQ+ Community Services Program Pilot

I. Purpose

The purpose of this grant is to provide community service programming for LGBTQ+ older adults and adults with disabilities in San Francisco that will maintain or improve their well-being and promote LGBTQ+ affirmation. The program will provide activities and services designed to support LGBTQ+ participants and their caregivers, increase awareness of services available to them, and reduce barriers for engagement.

II. Definitions

ADHC	Adult Day Health Care is a licensed community-based day health program that provides services to older persons and adults with chronic medical, cognitive, or mental health conditions and/or disabilities that are at risk of needing institutional care.
Adult with a Disability	A person 18 -59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, 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	SteppingStone
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.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
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; 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).
Unit of Service	Defined as one hour of service.
Unduplicated Consumer (UDC)	An individual who participates in LGBTQ+ Community Services Program Pilot and the grantee reflects consumer participation in SF DAS GetCare through enrollment.

III. Target Population

Services must target older adults and adults with disabilities who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- 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 participate in the program, an individual must be:

- A resident of San Francisco *and*
- Be an older adult or an adult with a disability *or*
- A caregiver of an older adult or an adult with disability.

V. Location and Time of Services

The grantee will provide community service programming at Mission Creek ADHC, 930 4th Street, San Francisco, CA 94158. Program hours are Monday through Friday, 12:30 to 4:30 p.m. Some programming will also be available virtually or by phone.

VI. Description of Services and Program Requirements

1. Grantee will provide community service programming for LGBTQ+ older adults and adults with disabilities, or their caregivers, in person, via telephone, virtually over the internet, or through other effective means of communication and connection. The provision of programming will be culturally attuned to attract LGBTQ+ individuals to participate. Community service programming consists of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of participants. There are four categories of community service 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 the 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-on-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, completion of forms/applications, home visits, medical escort services, and emotional support by phone or in person.
 - iv. **Enhanced Outreach:** Formal outreach efforts and/or the provision of enhanced services to engage the target population. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for underserved areas, problem solving certain barriers to services (i.e. safety issues, transportation needs, etc.).
2. Grantee will ensure that service offerings in the four 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. Grantee will have at least one (1.0) full time equivalent (FTE) of which at least 0.75 FTE will be a single employee whose work time and job description is dedicated to coordinating and delivering community service programming for LGBTQ+ older adults and adults with disabilities.
 6. Grantee will develop and maintain LGBTQ+ cultural competency training for staff. Grantee will create an annual training plan. The plan may include subcontract performance agreements and/or memorandums of understanding.
 7. Grantee will develop and maintain an enhanced outreach plan. The plan may include subcontract performance agreements and/or memorandums of understanding.
 8. Grantee will ensure that units of service provided are tracked and distinguishable.
 9. 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.
 10. 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.
 11. Higher Learning classes will be offered at the grantee's ADHC sites. 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," "Tai Chi," and

“Body Dynamics and the Aging Process.” These classes are college level classes taught by instructors with advanced degrees and teaching experience in the field of study.

VII. Service Objectives

On an annual basis, grantee will meet the following Services Objectives:

Service Objective	Annual Target
Unduplicated Consumer (UDC)	120
Activity Scheduling	700
Enhanced Outreach	500
Social Services	2,000
Translation Services	500
One (1) unit of service = One (1) hour of service provision	

VIII. Outcome Objectives

On an annual basis, grantee will meet the following Outcome Objectives:

LGBTQ+ Community Service Program

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

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

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 an annual satisfaction survey created by the grantee with input from DAS and with 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 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.
7. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
8. 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).
9. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
10. 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.
11. 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.
12. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
13. For assistance with reporting and contract requirements, please contact:

Sarah Chan
 Program Analyst
 Office of Community Partnerships
sarah.chan@sfgov.org

Rocio Duenas
 Senior Contracts Manager
 Office of Contracts Management
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, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name SteppingStone										Term July 1, 2022 - June 30, 2027
(Check One) New ___ Renewal ___ Modification <u>X</u> ___										
If modification, Effective Date of Mod. 1/1/24 No. of Mod. 1										
Program: LGBTQ+ Community Services Program Pilot										
Budget Reference Page No.(s)										
	FY 22/23	FY 23/24 Current	FY 23/24 Modification	FY 23/24 Revised	FY 24/25 Current	FY 24/25 Modification	FY24/25 Revised	FY25/26 Revised	FY26/27 Revised	Total
Expenditures										
Salaries & Benefits	\$96,929	\$96,929	\$7,146	\$104,075	\$96,929	\$7,146	\$104,075	\$104,075	\$104,075	\$513,229
Operating Expense	\$57,821	\$38,270	\$22,483	\$60,753	\$15,788	\$44,965	\$60,753	\$60,753	\$60,753	\$300,833
Subtotal	\$154,750	\$135,199	\$29,629	\$164,828	\$112,717	\$52,111	\$164,828	\$164,828	\$164,828	\$814,062
Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$23,590	\$20,658	\$0	\$20,658	\$20,658	\$0	\$20,658	\$20,658	\$20,658	\$106,222
Subcontractor/Capital Expenditure	\$57,179	\$57,179	\$0	\$57,179	\$57,179	\$0	\$57,179	\$57,179	\$57,179	\$285,895
Total Expenditures	\$235,519	\$213,036	\$29,629	\$242,665	\$190,554	\$52,111	\$242,665	\$242,665	\$242,665	\$1,206,179
HSA Revenues										
General Fund	\$235,519	\$213,036	\$29,629	\$242,665	\$190,554	\$52,111	\$242,665	\$242,665	\$242,665	\$1,206,179
TOTAL HSA REVENUES	\$235,519	\$213,036	\$29,629	\$242,665	\$190,554	\$52,111	\$242,665	\$242,665	\$242,665	\$1,206,179
Other Revenues										
Prepared by: _____ Telephone No.: _____ Date _____										
HSA-CO Review Signature: _____										
HSA #1 _____										

Program: LGBTQ+ Community Services Program Pilot
 (Same as Line 9 on HSA #1)

Operating Expense Detail

<u>EXPENDITURE CATEGORY</u>	<u>TERM</u>	<u>FY 22/23</u>	<u>FY 23/24 Revised</u>	<u>Modification</u>	<u>FY 23/24 Revised</u>	<u>FY24/25 Revised</u>	<u>Modification</u>	<u>FY24/25 Revised</u>	<u>FY25/26 Revised</u>	<u>FY26/27 Revised</u>	<u>Total</u>
Rental of Property											
Utilities(Elec, Water, Gas, Phone, Garbage)											
Office Supplies, Postage											
Building Maintenance Supplies and Repair											
Printing and Reproduction		\$7,000	\$7,000	(\$2,500)	\$4,500	\$7,000	(\$2,500)	\$4,500	\$4,500	\$4,500	\$25,000
Insurance											
Staff Training			\$4,000	(\$4,000)	\$0	\$4,000	(\$4,000)	\$0	\$0	\$0	\$0
Staff Travel-(Local & Out of Town)											
Rental of Equipment											
<u>CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE</u>											
<u>OTHER</u>											
Program Supplies		\$5,856	\$4,788	\$6,500	\$11,288	\$4,788	\$6,500	\$11,288	\$11,288	\$11,288	\$51,008
Higher Learning		\$44,965	\$22,482	\$22,483	\$44,965	\$0	\$44,965	\$44,965	\$44,965	\$44,965	\$224,825
TOTAL OPERATING EXPENSE		\$57,821	\$38,270	\$22,483	\$60,753	\$15,788	\$44,965	\$60,753	\$60,753	\$60,753	\$300,833

HSA #3

Program: LGBTQ+ Community Services Program Pilot
 (Same as Line 9 on HSA #1)

Appendix B-1, Page 4

Subcontractor & Capital Expenditure Detail

<u>Subcontractor Expenditure</u>	FY22/23	FY23/24	FY24/25	FY25/26	FY26/27	Total
Curry Senior Center	\$57,179	\$57,179	\$57,179	\$57,179	\$57,179	\$285,895
						\$0
						\$0
						\$0
						\$0
Total Subcontractor Expenditure	\$57,179	\$57,179	\$57,179	\$57,179	\$57,179	\$285,895
<u>Equipment (Qty)</u>	FY22/23	FY23/24	FY24/25	FY25/26	FY26/27	Total
						\$0
						\$0
						\$0
						\$0
Total Equipment Cost	\$0	\$0	\$0	\$0	\$0	\$0
<u>Remodeling</u>	FY22/23	FY23/24	FY24/25	FY25/26	FY26/27	Total
						\$0
						\$0
						\$0
						\$0
Total Remodeling Cost	\$0	\$0	\$0	\$0	\$0	\$0
Total Capital Expenditure	\$57,179	\$57,179	\$57,179	\$57,179	\$57,179	\$285,895
HSA #4						10/25/2016