



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

TO: DEPARTMENT OF DISABILITY AND AGING SERVICES
COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DS
EE

DATE: WEDNESDAY, FEBRUARY 5, 2025

SUBJECT: GRANT MODIFICATION: **LITTLE BROTHERS – FRIENDS OF THE ELDERLY SAN FRANCISCO (NON-PROFIT)** FOR PROVISION OF VOLUNTEER VISITOR PROGRAM

	<u>Current</u>	<u>Mod</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
GRANT TERM:	07/01/23 6/30/27	02/01/25 06/30/27	07/01/23 6/30/27		
GRANT AMOUNT:	\$301,420	\$136,152	\$437,572	\$43,757	\$481,329
MODIFIED ANNUAL AMOUNT:	<u>FY 23-24</u> \$75,355	<u>FY 24-25</u> \$120,739	<u>FY 25-26</u> \$120,739	<u>FY 26-27</u> \$120,739	
FUNDING SOURCE:	<u>County</u> \$437,572	<u>State</u>	<u>Federal</u>	<u>Contingency</u> \$43,757	<u>Total</u> \$481,329
PERCENTAGE:	100%				100%

The San Francisco Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant with Little Brothers – Friends of the Elderly San Francisco for the period of February 1, 2025 to June 30, 2027, in the additional amount of \$136,152 plus a 10% contingency for a revised total amount not to exceed \$481,329. The purpose of this modification is to provide additional services to the Volunteer Visitor Program and cost of doing business (CODB) for FY 24-25.



Background

DAS recognizes that social isolation remains a significant concern for older adults and adults with disabilities, as reinforced by the 2022 Dignity Fund Community Needs Assessment (DFCNA). Social isolation, which often leads to loneliness, was further exacerbated by COVID-19. The DFCNA emphasized the importance of programs that foster social connections and reduce isolation. Since 2019, DAS has funded the Volunteer Visitor program to address these needs. This program not only mitigates social isolation but also aligns with DAS's commitment to addressing equity factors in service delivery, as highlighted in the DFCNA.

Services to be Provided

The Volunteer Visitor program connects client participants to a volunteer visitor who meets at least twice a month for connection and social engagement. Visits can include accompaniment to outings, events, medical appointments or help with tasks such as shopping or exercising.

Under this modification, the contractor will provide a part-time Chinese-speaking staff member to recruit monolingual Chinese-speaking older adults and adults with disabilities to participate in the volunteer visitor program. This staff member will also assist with in-language client assessments and recruit additional Chinese speaking volunteers. There is currently a list of volunteers with Chinese language capacity who are being trained to be matched for this program. This effort addresses a critical need, as monolingual Chinese speaking individuals represent an underserved population at high risk for detrimental impacts from social isolation.

Additionally, \$7,500 will fund activities for volunteer-client pairs, enabling enriched visits to places like museums, the opera and symphony, sporting events and group outings. The fund will serve as an incentive for volunteers by covering small outing costs.

Selection

The grantee was selected through RFP #1057 issued in April 24, 2024.

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
 Little Brothers - Friends of the Elderly
 Volunteer Visitor Program
 July 1, 2023 – June 30, 2027**

I. Purpose of Grant

The purpose of this grant is to provide a visitor program that will match volunteers with older adults and/or adults with disabilities living in the City and County of San Francisco who may be socially isolated or at heightened risk of isolation.

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
Adult with a Disability	A person 18 to 59 years of age living with a disability
At Risk for Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone
CARBON	Contracts Administration, Reporting and Billing Online System
City	City and County of San Francisco, a municipal corporation
Client Participant	An older adult or adult with a disability participating in the Volunteer Visitor Program and reflected in SF DAS GetCare through program enrollment; used interchangeably with “unduplicated consumer”
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 of the San Francisco Human Services Agency

DAS Integrated Intake and Referral Unit	A unit within DAS that is equipped to receive calls from the community and provide information, referrals, and assistance for older adults and adults with disabilities, caregivers, and community-based organizations
Dignity Fund (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
Dignity Fund Community Needs Assessment (DFCNA)	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The first DFCNA was completed in fiscal year 2017-2018
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	Little Brothers- Friends of the Elderly (LBFE)
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. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years of age or older
Senior	Person who is 60 years of age 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 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
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.)
Three Item UCLA Loneliness Scale	A scale comprised of three questions that measures three dimensions of loneliness. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the Volunteer Visitor Program and reflected in SF DAS GetCare through program enrollment; used interchangeably with “client participant.”
Volunteer Visitor	An adult volunteer screened and trained by the grantee to provide in person visits to an older adult and/or adult with disability enrolled in the Volunteer Visitor Program.

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. Eligibility for Program Enrollment

1. A resident of San Francisco; and
2. A person who is an older adult or an adult with a disability.

V. Description of Services

1. Grantee will provide the Volunteer Visitor Program for older adults and/or adults with disabilities living in the City and County of San Francisco who may be socially isolated or at heightened risk of isolation. The program will

- connect an older adult or adult with a disability, hereinafter also known as client participant, to an 18-22 year old visiting volunteer.
2. A client participant will receive connection to in person social engagement at least twice per month for at least one hour each visit, for at least six months and supplemented with a phone call, when needed. Visits could include accompaniment to outings or events, help with tasks (e.g., shopping, organizing, exercising, and assisting with rides to community spaces (not in personal vehicles) or medical appointments).
 3. Pending any health directives or mandates by the Department of Public Health, visits could pivot to taking place by phone, email, or mail.
 4. Grantee will connect client participants with volunteer visitors through a matching process. The policy and procedures for the matching process conducted by the grantee will promote successful pairings and relationship building. A minimum of a six-month commitment by the volunteer visitor is required.
 5. Grantee will have written guidelines and expectations for both the client participant and volunteer visitor.
 6. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable, including the number of visits provided to client participants by volunteer visitors.
 7. Grantee will conduct outreach for its Volunteer Visitor Program aimed at reaching the target population and at recruiting volunteer visitors.
 8. Grantee will recruit, screen (including background check), and train volunteer visitors. The screening process for volunteer visitors will include, but is not limited to, a background check for all volunteer visitors.
 9. Grantee will ensure the volunteer training is comprehensive and includes, but is not limited to, how to report suspected abuse or self-neglect to APS, an overview of the services available at DAS Intake and Referral Unit, and the general role the unit has in serving older adults and adults with disabilities. Training must be provided before a volunteer begins visiting a client participant.
 10. Grantee will have readily available resources that volunteers can access as needed to help and support them in their role as a volunteer visitor.
 11. Grantee will conduct an in-home assessment of the client participant prior to connecting a client participant with a volunteer visitor to confirm that the visitor program is an appropriate service and to ensure the safety of both the client participate and volunteer visitor.
 12. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all client participants enrolled in the Volunteer Visitor Program.
 13. 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.
 14. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules when applicable.

15. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAS policy memoranda manual.
16. Volunteer visitors will provide quarterly emails or phone calls to staff on how visits are going, monthly logs of visits, and notifications to staff if client is ill, needs assistance, or appears to be deteriorating in a way the requires support.

VI. Location and Time of Services

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

VII. Service Objectives

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

SERVICE OBJECTIVES SUMMARY TABLE				
Service Objective	Annual Target			
	Original	Modified		
	FY 23-24	FY24-25	FY25-26	FY26-27
The number of client participants/unduplicated consumers enrolled	75	105	120	120
The number volunteer visitors, recruited, screened, and trained	75	100	115	115
The number of volunteer visitors connected to client participants	50	60	70	70
The number of visits provided to client participants by volunteer visitors	1200	1250	1680	1680

VIII. Outcome Objectives

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

1. At least 75% of the surveyed client participants will report that participation in the volunteer visitor program has supported them to develop a meaningful relationship or friendship.*
2. At least 75% of the surveyed client participants will report that participation in the Volunteer Visitor Program has decreased feelings of loneliness.*
3. At least 75% of participants will report enhanced feelings of connection through opportunities presented through/by the program.*
4. At least 75% or more of the client participants will participate in the Volunteer Visitor Program for six months or more.

**Based on a survey created by the grantee with input from DAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

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 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 with 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 VII and VIII, 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 consumer 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 SF-HSA. The due dates for submitting the bi-annual summary reports are January 10th (July 1st through December 31st data) and July 10th (January 1st through June 30th data).
9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAS.
10. For assistance with reporting requirements or submission of reports, contact:

Erica Maybaum
Program Manager
DAS, Office of Community Partnerships
Erica.Maybaum@SFgov.org

Patrick Garcia
Contract Manager
HSA, Office of Contract Management
Patrick.Garcia@SFgov.org

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer 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 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 V, VI, VII, VIII and IX.

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 Little Brothers-Friends of the Elderly											Term 7/1/23 - 6/30/27
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>											
If modification, Effective Date of Mod. 2/1/25 No. of Mod. 1											
Program: Volunteer Visitor Program											
Budget Reference Page No.(s)			(Modification)			(Modification)			(Modification)		(Total)
Program Term	7/1/23 - 6/30/24	7/1/24 - 6/30/25	2/1/25 - 6/30/25	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/25 - 6/30/26	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/26 - 6/30/27	7/1/26 - 6/30/27	7/1/23 - 6/30/27
DAS Expenditures											
Salaries & Benefits	\$73,286	\$73,286	\$18,734	\$92,020	\$73,286	\$36,000	\$109,286	\$73,286	\$36,000	\$109,286	\$383,878
Operating Expenses	\$2,069	\$2,069	\$26,650	\$28,719	\$2,069	\$9,384	\$11,453	\$2,069	\$9,384	\$11,453	\$53,694
Subtotal	\$75,355	\$75,355	\$45,384	\$120,739	\$75,355	\$45,384	\$120,739	\$75,355	\$45,384	\$120,739	\$437,572
Indirect Percentage (%)											
Indirect Cost											
Capital/Subcontractor Expenditures											
Total DAS Expenditures	\$75,355	\$75,355	\$45,384	\$120,739	\$75,355	\$45,384	\$120,739	\$75,355	\$45,384	\$120,739	\$437,572
DAS Revenues											
Funding	\$75,355	\$75,355		\$75,355	\$75,355		\$75,355	\$75,355		\$75,355	\$301,420
CODB			\$1,884	\$1,884		\$1,884	\$1,884		\$1,884	\$1,884	\$5,652
Additional Funds			\$43,500	\$43,500		\$43,500	\$43,500		\$43,500	\$43,500	\$130,500
Total DAS Revenue	\$75,355	\$75,355	\$45,384	\$120,739	\$75,355	\$45,384	\$120,739	\$75,355	\$45,384	\$120,739	\$437,572
Non DAS Revenues											
Total Non DAS Revenue											
TOTAL DAS AND NON DAS REVENUE	\$75,355	\$75,355	\$45,384	\$120,739	\$75,355	\$45,384	\$120,739	\$75,355	\$45,384	\$120,739	\$437,572
Prepared by:											Date:
HSA-CO Review Signature:											
HSA #1											

Salaries & Benefits Detail

(Modification)

DAS Salaries & Benefits	Agency Totals					HSA Program					(Modification)					(Total)							
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	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	Budgeted Salary	
Program Coordinator	\$64,315	0.80	100%	0.80	\$51,452	\$64,315	0.80	100%	0.80	\$51,452		\$51,452	\$64,315	0.80	100%	0.80	\$51,452		\$51,452	\$51,452		\$51,452	\$205,808
Volunteer Coordinator	\$65,165	0.25	100%	0.25	\$16,291	\$65,165	0.25	100%	0.25	\$16,291		\$16,291	\$65,165	0.25	100%	0.25	\$16,291		\$16,291	\$16,291		\$16,291	\$65,164
Assessment Coordinator	\$55,425	0.10	100%	0.10	\$5,543	\$55,425	0.17	100%	0.17	\$5,543	\$3,734	\$9,277	\$55,425	0.10	100%	0.10	\$5,543		\$5,543	\$5,543		\$5,543	\$25,906
Bi-Lingual coordinator (February 2025)						\$72,000	0.50	42%	0.21		\$15,000	\$15,000	\$72,000	0.50	100%	0.50		\$36,000	\$36,000		\$36,000	\$36,000	\$87,000
Totals	\$184,905	1.15	300%	1.15	\$73,286	\$256,905	1.72	342%	1.43	\$73,286	\$18,734	\$92,020	\$256,905	1.65	400%	1.65	\$73,286	\$36,000	\$109,286	\$73,286	\$36,000	\$109,286	\$383,878
Fringe Benefits Rate																							
Employee Fringe Benefits																							
Total DAS Salaries and Benefits	\$184,905				\$73,286	\$256,905				\$73,286	\$18,734	\$92,020	\$256,905				\$73,286	\$36,000	\$109,286	\$73,286	\$36,000	\$109,286	\$383,878

HSA #2

Program: Volunteer Visitor Program

Appendix B-1, Page 3

Operating Expense Detail

		(Modification)			(Modification)			(Modification)		(Total)
7/1/23 - 6/30/24	7/1/24 - 6/30/25	2/1/25 - 6/30/25	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/25 - 6/30/26	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/26 - 6/30/27	7/1/26 - 6/30/27	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	\$500	\$500	\$7,500	\$8,000	\$500	\$500	\$500	\$500	\$500	\$9,500
Building Maintenance Supplies and Repair										
Printing and Reproduction	\$1,089	\$1,089	\$7,500	\$8,589	\$1,089	\$1,089	\$1,089	\$1,089	\$1,089	\$11,856
Insurance										
Staff Training										
Staff Travel	\$480	\$480	\$5,000	\$5,480	\$480	\$1,884	\$2,364	\$480	\$1,884	\$10,688
Rental of Equipment										
<u>Consultants</u>										
<u>Other</u>										
Activity Funds			\$3,150	\$3,150		\$7,500	\$7,500		\$7,500	\$18,150
Laptop			\$2,500	\$2,500						\$2,500
Advertisement			\$1,000	\$1,000						\$1,000
Total DAS Operating Expenses	\$2,069	\$2,069	\$26,650	\$28,719	\$2,069	\$9,384	\$11,453	\$2,069	\$9,384	\$53,694

HSA #3