



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

Office of Early Care  
and Education

P.O. Box 7988  
San Francisco, CA  
94120-7988  
[www.SFHSA.org](http://www.SFHSA.org)



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

## MEMORANDUM

<b>TO:</b>	DISABILITY AND AGING SERVICES COMMISSION										
<b>THROUGH:</b>	KELLY DEARMAN, EXECUTIVE DIRECTOR										
<b>FROM:</b>	CINDY KAUFFMAN, DEPUTY DIRECTOR ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS <span style="float: right; border: 1px solid black; padding: 2px;">DS EL</span>										
<b>DATE:</b>	DECEMBER 1, 2021										
<b>SUBJECT:</b>	GRANT MODIFICATIONS: MULTIPLE GRANTEES (NON-PROFIT) FOR PROVISION OF AGING AND DISABILITIES RESOURCE CENTERS (ADRC)										
<b>GRANT TERM(S):</b>	01/01/21 – 06/30/24										
<b>GRANT AMOUNT:</b>	<table border="0"> <thead> <tr> <th><u>Current</u></th> <th><u>Modification</u></th> <th><u>Revised</u></th> <th><u>Contingency</u></th> <th><u>Total</u></th> </tr> </thead> <tbody> <tr> <td>\$2,264,172</td> <td>\$313,525</td> <td>\$2,577,697</td> <td>\$257,770</td> <td>\$2,835,467</td> </tr> </tbody> </table>	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>	\$2,264,172	\$313,525	\$2,577,697	\$257,770	\$2,835,467
<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>							
\$2,264,172	\$313,525	\$2,577,697	\$257,770	\$2,835,467							
<b>ANNUAL MOD AMOUNT:</b>	<table border="0"> <thead> <tr> <th><u>FY 21/22</u></th> <th><u>FY 22/23</u></th> <th><u>FY 23/24</u></th> </tr> </thead> <tbody> <tr> <td>\$240,393</td> <td>\$36,566</td> <td>\$36,566</td> </tr> </tbody> </table>	<u>FY 21/22</u>	<u>FY 22/23</u>	<u>FY 23/24</u>	\$240,393	\$36,566	\$36,566				
<u>FY 21/22</u>	<u>FY 22/23</u>	<u>FY 23/24</u>									
\$240,393	\$36,566	\$36,566									
<b>Funding Source</b>	<table border="0"> <thead> <tr> <th><u>County</u></th> <th><u>State</u></th> <th><u>Federal</u></th> <th><u>Contingency</u></th> <th><u>Total</u></th> </tr> </thead> <tbody> <tr> <td>\$2,242,596</td> <td></td> <td>\$335,101</td> <td>\$257,770</td> <td>\$2,835,467</td> </tr> </tbody> </table>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>	\$2,242,596		\$335,101	\$257,770	\$2,835,467
<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>							
\$2,242,596		\$335,101	\$257,770	\$2,835,467							
<b>FUNDING: PERCENTAGE:</b>	<table border="0"> <tbody> <tr> <td style="width: 50%;">87%</td> <td style="width: 50%;">13%</td> </tr> <tr> <td style="width: 50%;"></td> <td style="width: 50%;">100%</td> </tr> </tbody> </table>	87%	13%		100%						
87%	13%										
	100%										

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing contract with multiple providers for the period of July 1, 2021 to June 30, 2024, in the additional amount of \$313,525 plus a 10% contingency for a revised total amount not to exceed \$2,835,467. The purpose of this modification is to increase Chinese and Spanish language staffing to meet demand.

Agency	Current Grant Amount	FY21-22 Mod Amount	FY22-23 Mod Amount	FY23-24 Mod Amount	FY21-24 Total Mod Amount	Revised FY21-24 Amount	10% Contingency	FY21-24 Total Not to Exceed
Mission Neighborhood Centers	\$396,790	\$96,434	\$6,434	\$6,434	\$109,302	\$506,092	\$50,609	\$556,701
On Lok Day Services	\$565,301	\$48,588	\$8,588	\$8,588	\$65,764	\$631,065	\$63,107	\$694,172
Self-Help for the Elderly	\$1,302,081	\$95,371	\$21,544	\$21,544	\$138,459	\$1,440,540	\$144,054	\$1,584,594
<b>TOTAL</b>	<b>\$2,264,172</b>	<b>\$240,393</b>	<b>\$36,566</b>	<b>\$36,566</b>	<b>\$313,525</b>	<b>\$2,577,697</b>	<b>\$257,770</b>	<b>\$2,835,467</b>

### 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. 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.

### **Modification**

The following modifications include:

#### Mission Neighborhood Centers

The additional funding supports an increase in Spanish language capacity staffing and adds an additional full time employee with Chinese language capacity. These staffing additions will have a significant impact on supporting the language needs of District 9.

#### On Lok Day Services

The additional funding supports an increase in Chinese language capacity staffing from a half time to full time employee. This District 8 ADRC has seen an increase in the number of Chinese speaking residents seeking services, and this increase will help to address that need.

#### Self-Help for the Elderly

The additional funding supports hiring an additional full time Chinese speaking staff person. Self-Help for the Elderly currently operates four ADRC sites across Districts 3, 4, and 7. This additional staff person will support staffing needs and Chinese language capacity across all their sites and districts.

### **Selection**

Grantees were selected through Request for Proposal (RFP) #874 issued September 2020, for Aging and Disability Resource Centers (ADRC).

### **Funding**

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

### **ATTACHMENTS**

#### **Mission Neighborhood Centers**

Appendix A-1, Scope of Services

Appendix B-1, Budget

#### **On Lok Day Services**

Appendix A-1, Scope of Services

Appendix B-1, Budget

#### **Self-Help for the Elderly**

Appendix A-1, Scope of Services

Appendix B-1, Budget

**APPENDIX A-1 – SERVICES TO BE PROVIDED  
MISSION NEIGHBORHOOD CENTERS  
AGING AND DISABILITIES RESOURCE CENTER (ADRC)  
January 1, 2021 to June 30, 2024**

**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	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, 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
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
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.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
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 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 clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

### III. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Frail

- Member of the LGBTQ+ Community

#### IV. **Location and Time of Services**

The location for Mission Neighborhood Center is 362 Capp Street, San Francisco CA 94110. Hours of operation are from 9:00am-12:30pm and 1:00pm-5:00pm, Monday to Saturday.

#### 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 SFGetCare.
- 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.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Mission Neighborhood Centers ADRC:

- Will serve the following unduplicated older adults:
  - 600 in FY 20/21
  - 1750 in FY 21/22
  - 2250 in FY 22/23-FY23/24
- Will serve the following unduplicated adults with disabilities:
  - 60 in FY 20/21
  - 200 in FY 21/22
  - 250 in FY 22/23-FY23/24
- Will provide the following units of information and referral services:
  - 1200 in FY 20/21
  - 2100 in FY 21/22
  - 2800 in FY 22/23-FY23/24
- Will provide the following service units of assistance:
  - 1100 in FY 20/21
  - 1900 in FY 21/22
  - 2500 in FY 22/23-FY23/24
- Will provide the following units of follow-up services:
  - 175 in FY 20/21
  - 425 in FY 21/22
  - 500 in FY 22/23-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 15<sup>th</sup> 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.
- Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5<sup>th</sup> working day of the month for the preceding month.
- 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 10<sup>th</sup> day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- 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).
- 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.
- 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  
PO Box 7988  
San Francisco, CA 94120  
E:mail address: [sara.hofverberg@sfgov.org](mailto:sara.hofverberg@sfgov.org)

Tara Alvarez, Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120  
Email address: [tara.alvarez@sfgov.org](mailto:tara.alvarez@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 ir2.sfgetcare.com, 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.

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2												
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>											
4	<b>BY PROGRAM</b>											
5	Name		Term									
6	Agency Name: <b>Mission Neighborhood Centers, Inc.</b>		1/1/21-6/30/24									
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>											
8	If modification, Effective Date of Mod. <b>11.01.2021</b> No. of Mod. <b>1</b>											
9	Program: <b>ADRC</b>											
10	Budget Reference Page No.(s)											
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	<b>REVISION</b> 7/1/21 - 6/30/22	<b>TOTAL</b> 7/1/21 - 6/30/22	7/1/22-6/30/23	<b>REVISION</b> 7/1/22-6/30/23	<b>TOTAL</b> 7/1/22-6/30/23	7/1/23-6/30/24	<b>REVISION</b> 7/1/23-6/30/24	<b>TOTAL</b> 7/1/23-6/30/24	1/1/21-6/30/24 Total
12	<b>Expenditures</b>											
13	Salaries & Benefits	\$43,274	\$96,317	\$80,063	\$176,380	\$96,317	\$5,456	\$101,773	\$96,317	\$5,456	\$101,773	\$423,199
14	Operating Expenses	\$9,997	\$937	\$3,793	\$4,730	\$937	\$139	\$1,076	\$937	\$139	\$1,076	\$16,879
15	<b>Subtotal</b>	<b>\$53,271</b>	<b>\$97,254</b>	<b>\$83,856</b>	<b>\$181,110</b>	<b>\$97,254</b>	<b>\$5,595</b>	<b>\$102,849</b>	<b>\$97,254</b>	<b>\$5,595</b>	<b>\$102,849</b>	<b>\$440,078</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$7,991	\$14,589	\$12,578	\$27,166	\$14,589	\$839	\$15,427	\$14,589	\$839	\$15,427	\$66,012
18	Subcontractor/Capital Expenditures											
19	Total Expenditures	\$61,262	\$111,843	\$96,434	\$208,276	\$111,843	\$6,434	\$118,276	\$111,843	\$6,434	\$118,276	\$506,092
20	<b>HSA Revenues</b>											
21	General Fund	\$61,262	\$111,843		\$111,843	\$111,843		\$111,843	\$111,843		\$111,843	\$396,790
22	20/21 CODB			\$2,988	\$2,988		\$2,988	\$2,988		\$2,988	\$2,988	\$8,965
23	21/22 CODB			\$3,445	\$3,445		\$3,445	\$3,445		\$3,445	\$3,445	\$10,336
24	Addback			\$90,000	\$90,000							\$90,000
25												
26												
27												
28												
29	<b>TOTAL HSA REVENUES</b>	<b>\$61,262</b>	<b>\$111,843</b>	<b>\$96,434</b>	<b>\$208,276</b>	<b>\$111,843</b>	<b>\$6,434</b>	<b>\$118,276</b>	<b>\$111,843</b>	<b>\$6,434</b>	<b>\$118,276</b>	<b>\$506,092</b>
30	<b>Other Revenues</b>											
31												
32												
33												
34												
35												
36	Total Revenues	\$61,262	\$111,843	\$96,434	\$208,276	\$111,843	\$6,434	\$118,276	\$111,843	\$6,434	\$118,276	\$506,092
37	Full Time Equivalent (FTE)	2.53	2.53		2.53	2.53		1.42	2.53		1.42	
39	Prepared by: <b>Aurora Alvarado</b> Telephone No.: <b>415.206.7750</b>											
40	HSA-CO Review Signature: _____											
41	HSA#1											6/20/2018



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
1																										
2																										
3																										
4																										
5																										
6																										
7																										
8																										
9																										
10																										
11																										
12																										
13																										
14																										
15																										
16																										
17																										
18																										
19																										
20																										
21																										
22																										
23																										
24																										
25																										
26																										
27																										
28																										
29																										
30																										
31																										
32																										
33																										
34																										

	A	B	C	D	E	F
1						Appendix B, Page 4
2						
3	Agency Name: Mission Neighborhood Centers, Inc.					
4	Program: ADRC					
5						
6						
7						
8	<b>Subcontractor/Capital Expenditures</b>					
9						
10	<b>SUBCONTRACTORS</b>		1/1/21-6/30/21	7/1/21-6/30/22	7/1/23-6/30/24	1/1/21-6/30/24
11	Subcontractor 1					
12	Subcontractor 2					
13						
14						
15						
16	<b>TOTAL SUBCONTRACTOR COST</b>		\$0	\$0	\$0	\$0
17						
18						
19	<b>EQUIPMENT</b>		1/1/21-6/30/21	7/1/21-6/30/22	7/1/23-6/30/24	1/1/21-6/30/24
	<b>TERM</b>					
20	Units	ITEM/DESCRIPTION				
21		Equipment A				
22						
23						
24						
25	<b>TOTAL EQUIPMENT COST</b>		\$0	\$0	\$0	\$0
26						
27	<b>R E M O D E L I N G</b>		1/1/21-6/30/21	7/1/21-6/30/22	7/1/23-6/30/24	1/1/21-6/30/24
28	Description:					
29	Remodel A					
30						
31						
32	<b>TOTAL REMODELING COST</b>		\$0	\$0	\$0	\$0
33						
34	<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>		<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
35						
36	<b>HSA #4</b>					6/20/2018

**APPENDIX A-1 – SERVICES TO BE PROVIDED  
ON LOK DAY SERVICES  
AGING AND DISABILITIES RESOURCE CENTER (ADRC)  
January 1, 2021 to June 30, 2024**

**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	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, 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
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
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.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
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 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 clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

### III. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Frail
- Member of the LGBTQ+ Community

**IV. Location and Time of Services**

Services will be provided at the On Lok 30<sup>th</sup> Street Senior Center located at 225 30<sup>th</sup> Street, San Francisco, CA 94131. Hours of operation are from 8:30am-5pm, Monday to Saturday

**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 SFGetCare.
- 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.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, On Lok Day Services ADRC:

- Will serve the following unduplicated older adults:  
809 in FY 20/21  
1780 in FY 21/22  
1940 in FY 22/23 and FY 23/24
- Will serve the following unduplicated adults with disabilities:  
140 in FY 20/21  
335 in FY 21/22  
308 in FY 22/23 and FY 23/24
- Will provide the following units of information and referral services:  
1296 in FY 20/21  
2850 in FY 21/22-FY 23/24  
3110 in FY 22/23 and FY 23/24
- Will provide the following service units of assistance:  
1273 in FY 20/21  
2800 in FY 21/22-FY 23/24  
3055 in FY 22/23 and FY 23/24
- Will provide the following units of follow-up services:  
826 in FY 20/21  
1815 in FY 21/22-FY23/24  
1980 in FY 22/23 and FY 23/24

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.

- A.** 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 15<sup>th</sup> 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 SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5<sup>th</sup> 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 10<sup>th</sup> 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  
PO Box 7988  
San Francisco, CA 94120  
E:mail address: [sara.hofverberg@sfgov.org](mailto:sara.hofverberg@sfgov.org)

Patrick Garcia, Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120  
Email address: [patrick.garcia@sfgov.org](mailto: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 [ir2.sfgetcare.com](http://ir2.sfgetcare.com), 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											Term
<b>On-Lok Day Services</b>											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. 7/1/21 No. of Mod. 1											
<b>Program: Aging and Disability Resource Center</b>											
Budget Reference Page No.(s)											
Program Term											
	1/1/21 - 6/30/21	7/1/21 - 6/30/22	(Modification) 7/1/21 - 6/30/22	7/1/21 - 6/30/22	7/1/22 - 6/30/23	(Modification) 7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	(Modification) 7/1/23 - 6/30/24	7/1/23 - 6/30/24	Total 1/1/21 - 6/30/24
<b>Expenditures</b>											
Salaries & Benefits	\$69,190	\$133,980	\$42,250	\$176,230	\$133,646	\$7,468	\$141,114	\$133,646	\$7,468	\$141,114	\$527,648
Operating Expenses	\$10,759	\$3,476		\$3,476	\$3,435		\$3,435	\$3,435		\$3,435	\$21,105
<b>Subtotal</b>	<b>\$79,949</b>	<b>\$137,456</b>	<b>\$42,250</b>	<b>\$179,706</b>	<b>\$137,081</b>	<b>\$7,468</b>	<b>\$144,549</b>	<b>\$137,081</b>	<b>\$7,468</b>	<b>\$144,549</b>	<b>\$548,753</b>
Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$11,993	\$20,617	\$6,338	\$26,955	\$20,562	\$1,120	\$21,682	\$20,562	\$1,120	\$21,682	\$82,312
Subcontractor/Capital Expenditures											
<b>Total Expenditures</b>	<b>\$91,942</b>	<b>\$158,073</b>	<b>\$48,588</b>	<b>\$206,661</b>	<b>\$157,643</b>	<b>\$8,588</b>	<b>\$166,231</b>	<b>\$157,643</b>	<b>\$8,588</b>	<b>\$166,231</b>	<b>\$631,065</b>
<b>HSA Revenues</b>											
Federal	\$8,797	\$15,764		\$15,764	\$15,764		\$15,764	\$15,764		\$15,764	\$56,089
Local	\$79,169	\$141,879		\$141,879	\$141,879		\$141,879	\$141,879		\$141,879	\$504,806
CODB	\$3,746		\$8,588	\$8,588		\$8,588	\$8,588		\$8,588	\$8,588	\$29,510
MCO	\$230	\$430		\$430							\$660
Lanugage Staffing (FY 21/22) (OTO)			\$40,000	\$40,000							\$40,000
<b>TOTAL HSA REVENUES</b>	<b>\$91,942</b>	<b>\$158,073</b>	<b>\$48,588</b>	<b>\$206,661</b>	<b>\$157,643</b>	<b>\$8,588</b>	<b>\$166,231</b>	<b>\$157,643</b>	<b>\$8,588</b>	<b>\$166,231</b>	<b>\$631,065</b>
<b>Other Revenues</b>											
Fundraising		\$36,097	(\$10,264)	\$25,833	\$36,318	(\$5,171)	\$31,147	\$36,318	(\$5,171)	\$31,147	\$88,126
<b>Total Revenues</b>	<b>\$91,942</b>	<b>\$194,170</b>	<b>\$38,324</b>	<b>\$232,494</b>	<b>\$193,961</b>	<b>\$3,417</b>	<b>\$197,378</b>	<b>\$193,961</b>	<b>\$3,417</b>	<b>\$197,378</b>	<b>\$719,191</b>
Full Time Equivalent (FTE)	2.19	2.17	0.75	2.92	2.21	0.13	2.34	2.21	0.13	2.34	
Prepared by:	Meko Ma										
HSA-CO Review Signature:											
HSA #1											
	(628)208-8546										

Salaries & Benefits Detail																																							
(Modification) TOTAL																																							
1/1/21 - 6/30/21										7/1/21 - 6/30/22					7/1/22 - 6/30/23					7/1/23 - 6/30/24																			
Agency Totals		HSA Program		DAS		Agency Totals		HSA Program		DAS		DAS		DAS		Agency Totals		HSA Program		DAS		DAS		DAS		Agency Totals		HSA Program		DAS		DAS		DAS		Total			
POSITION TITLE	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	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary					
I&A Specialist #1	\$49,223	0.85	100%	0.85	\$20,920	\$49,733	1.00	100%	1.00	\$49,733		\$49,733	\$49,733	1.00	100%	1.00	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$49,733	\$170,119					
I&A Specialist #2	\$43,680	1.00	100%	1.00	\$21,840	\$43,680	1.00	100%	1.00	\$43,680		\$43,680	\$43,680	1.00	100%	1.00	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$43,680	\$152,880				
I&A Specialist #3	\$43,680	0.14	100%	0.14	\$3,058	\$43,680	0.82	100%	0.82	\$3,022	\$33,008	\$36,030	\$43,680	0.29	100%	0.29	\$6,880	\$5,834	\$12,714	\$6,880	\$5,834	\$12,714	\$6,880	\$5,834	\$12,714	\$6,880	\$5,834	\$12,714	\$6,880	\$5,834	\$12,714	\$6,880	\$5,834	\$12,714	\$64,516				
Geriatric Support Services Mgr	\$82,368	1.00	20%	0.20	\$8,237	\$82,368	1.00	10%	0.10	\$8,237		\$8,237	\$82,368	1.00	5%	0.05	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$4,118	\$24,710				
TOTALS	\$218,951	2.99	320%	2.19	\$54,055	\$219,461	3.82	310%	2.92	\$104,672	\$33,008	\$137,680	\$219,461	3.29	305%	2.34	\$104,411	\$5,834	\$110,245	\$104,411	\$5,834	\$110,245	\$104,411	\$5,834	\$110,245	\$104,411	\$5,834	\$110,245	\$104,411	\$5,834	\$110,245	\$104,411	\$5,834	\$110,245	\$412,225				
FRINGE BENEFIT RATE	28%				28%				28%				28%				28%				28%				28%				28%				28%						
EMPLOYEE FRINGE BENEFITS	\$61,306				\$15,135	\$61,449				\$29,308	\$9,242	\$38,550	\$61,449				\$29,235	\$1,634	\$30,869	\$29,235	\$1,634	\$30,869	\$29,235	\$1,634	\$30,869	\$29,235	\$1,634	\$30,869	\$29,235	\$1,634	\$30,869	\$29,235	\$1,634	\$30,869	\$115,423				
TOTAL DAS SALARIES & BENEFITS	\$280,257				\$69,190	\$280,910				\$133,980	\$42,250	\$176,230	\$280,910				\$133,646	\$7,468	\$141,114	\$133,646	\$7,468	\$141,114	\$133,646	\$7,468	\$141,114	\$133,646	\$7,468	\$141,114	\$133,646	\$7,468	\$141,114	\$133,646	\$7,468	\$141,114	\$527,648				
Non-DAS																																							
1/1/21 - 6/30/21																				7/1/21 - 6/30/22					7/1/22 - 6/30/23					7/1/23 - 6/30/24					Total				
I&A Specialist #1	\$49,223	0.85	-	-		\$49,733	1.00	-	-			\$49,732.80	1.00	-	-		\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$49,732.80	\$170,119				
I&A Specialist #2	\$43,680	1.00	-	-		\$43,680	1.00	-	-			\$43,680.00	1.00	-	-		\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$152,880				
I&A Specialist #3	\$43,680	0.14	-	-		\$43,680	0.82	-	-	\$7,862	(\$7,862)	\$43,680.00	0.29	-	-	\$4,040	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$43,680.00	\$15,942				
Geriatric Support Services Mgr	\$82,368	1.00	-	-		\$82,368	1.00	15%	0.15	\$12,355	\$12,355	\$82,368.00	1.00	20%	0.20	\$16,474	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$82,368.00	\$45,303				
TOTALS	\$218,951	2.99	-	-		\$219,461	3.82	15%	0.15	\$20,217	(\$7,862)	\$12,355	\$219,461	3.29	20%	0.20	\$20,514	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$219,461	\$61,245				
FRINGE BENEFIT RATE	28%				28%				28%				28%				28%				28%				28%				28%				28%						
EMPLOYEE FRINGE BENEFITS	\$61,306				\$61,449					\$5,661	(\$2,202)	\$3,459	\$61,449				\$5,744	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$61,449	\$17,149					
TOTAL Non-DAS SALARIES & BENEFITS	\$280,257				\$280,910					\$25,878	(\$10,064)	\$15,814	\$280,910				\$26,258	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$280,910	\$78,394					
TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$280,257				\$69,190	\$280,910				\$159,858	\$32,186	\$192,044	\$280,910				\$159,904	\$2,297	\$162,201	\$159,904	\$2,297	\$162,201	\$159,904	\$2,297	\$162,201	\$159,904	\$2,297	\$162,201	\$159,904	\$2,297	\$162,201	\$159,904	\$2,297	\$162,201	\$548,856				

On-Lok Day Services  
Program: Aging and Disability Resource Center

Operating Expense Detail

<b>H.S.A-DAS</b>		(Modification)	TOTAL	(Modification)	TOTAL	(Modification)	TOTAL	(Modification)	TOTAL	Total
Expenditure Category	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/21 - 6/30/22	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property										
Utilities(Elec, Water, Gas, Phone, Garbage)	\$ 1,091	\$ 722		\$722	714		\$714	714		\$ 3,241
Office Supplies, Postage	\$ 2,584	\$ 192		\$192	190		\$190	190		\$ 3,156
Building Maintenance Supplies and Repair	\$ 1,818	\$ -			-			-		\$ 1,818
Printing and Reproduction	\$ 750	\$ 497		\$497	491		\$491	491		\$ 2,229
Insurance	\$ 523	\$ 347		\$347	343		\$343	343		\$ 1,556
Staff Training	\$ 100	\$ 497		\$497	491		\$491	491		\$ 1,579
Staff Travel-(Local & Out of Town)	\$ 150	\$ 497		\$497	491		\$491	491		\$ 1,629
Rental of Equipment	\$ 437	\$ 90		\$90	89		\$89	89		\$ 705
<b>CONSULTANTS</b>										\$ -
										\$ -
										\$ -
										\$ -
										\$ -
<b>OTHER</b>										
Payroll Processing	\$ 179	\$ 86		86	85		85	85		\$ 435
Data Plan	\$ 827	\$ 548		548	541		541	541		\$ 2,457
Recruiting Fee	\$ 2,300									\$ 2,300
										\$ -
										\$ -
<b>TOTAL DAAS OPERATING EXPENSE</b>	<b>\$10,759</b>	<b>\$3,476</b>		<b>\$3,476</b>	<b>\$3,435</b>		<b>\$3,435</b>	<b>\$3,435</b>		<b>\$21,105</b>
<b>Non-DAS</b>										
Expenditure Category	1/1/21 - 6/30/21	7/1/21 - 6/30/22	(Modification)	TOTAL	7/1/22 - 6/30/23	(Modification)	TOTAL	7/1/23 - 6/30/24	(Modification)	TOTAL
Rental of Property										
Utilities(Elec, Water, Gas, Phone, Garbage)		\$ 1,460		\$1,460	1,468		\$1,468	1,468		\$ 4,396
Office Supplies, Postage		\$ 388		\$388	390		\$390	390		\$ 1,168
Building Maintenance Supplies and Repair		\$ 3,000		\$3,000	3,000		\$3,000	3,000		\$ 9,000
Printing and Reproduction		\$ 1,003		\$1,003	1,009		\$1,009	1,009		\$ 3,021
Insurance		\$ 700		\$700	704		\$704	704		\$ 2,107
Staff Training		\$ 1,003		\$1,003	1,009		\$1,009	1,009		\$ 3,021
Staff Travel-(Local & Out of Town)		\$ 1,003		\$1,003	1,009		\$1,009	1,009		\$ 3,021
Rental of Equipment		\$ 183		\$183	184		\$184	184		\$ 552
<b>CONSULTANTS</b>										\$ -
										\$ -
										\$ -
										\$ -
										\$ -
<b>OTHER</b>										
Payroll Processing		\$ 173		173	174		174	174		\$ 521
Data Plan		\$ 1,106		1,106	1,113		1,113	1,113		\$ 3,332
										\$ -
										\$ -
										\$ -
<b>TOTAL Non-DAS OPERATING EXPENSES</b>		<b>\$10,019</b>		<b>\$10,019</b>	<b>\$10,060</b>		<b>\$10,060</b>	<b>\$10,060</b>		<b>\$30,138</b>
<b>TOTAL DAAS &amp; Non-DAAS OPERATING EXPENSE</b>	<b>\$10,759</b>	<b>\$13,495</b>		<b>\$13,495</b>	<b>\$13,495</b>		<b>\$13,495</b>	<b>\$13,495</b>		<b>\$51,243</b>
<b>HSA #3</b>										

**APPENDIX A-1 – SERVICES TO BE PROVIDED  
SELF-HELP FOR THE ELDERLY  
AGING AND DISABILITIES RESOURCE CENTER (ADRC)  
January 1, 2021 to June 30, 2024  
Modification: November 3, 2021**

**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	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, 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
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
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.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
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 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 clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

### III. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Frail
- Member of the LGBTQ+ Community



**IV. Location and Time of Services**

The services for Self-Help for the Elderly will be provided at 4 locations: 601 Jackson Street, San Francisco, CA 94133 and 777 Stockton Street, San Francisco CA 94108, 131 Lenox Way, San Francisco, CA 94127 and 2601 40th Avenue, San Francisco, CA 94116. Hours of operation at 601 Jackson Street and 777 Stockton Street are from 9:00am-5pm, Monday to Friday. Hours of operation at 131 Lenox Way and 2601 40<sup>th</sup> Avenue are from 9:00am-2:00pm, 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 SFGetCare.
- 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.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Self-Help for the Elderly ADRC:

- Will serve the following unduplicated older adults:
  - 2400 in FY 20/21
  - 5160 in FY 21/22
  - 5520 in FY 22/23 and FY 23/24
- Will serve the following unduplicated adults with disabilities:
  - 200 in FY 20/21
  - 515 in FY 21/22
  - 550 in FY 22/23 and FY 23/24
- Will provide the following units of information and referral services:
  - 2840 in FY 20/21
  - 6100 in FY 21/22
  - 65309n FY 22/23 and FY 23/24
- Will provide the following service units of assistance:
  - 5000 in FY 20/21
  - 10,750 in FY 21/22
  - 11500 in FY 22/23 and FY 23/24
- Will provide the following units of follow-up services:
  - 850 in FY 20/21
  - 1825 in FY 21/22
  - 1955 in FY 22/23 and FY 23/24

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.

- A.** 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 15<sup>th</sup> 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 SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5<sup>th</sup> 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 10<sup>th</sup> 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  
 PO Box 7988  
 San Francisco, CA 94120  
 E:mail address: [sara.hofverberg@sfgov.org](mailto:sara.hofverberg@sfgov.org)

Tahir Shaikh, Contract Manager  
 Human Services Agency  
 PO Box 7988  
 San Francisco, CA 94120  
 Email address: [tahir.shaikh@sfgov.org](mailto:tahir.shaikh@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 ir2.sfgetcare.com, 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.

	A	E	F	G	H	I	J	K	L	M	N
1	Appe										
2	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>										
3	<b>BY PROGRAM</b>										
4											
5	Name									Term	
6	<b>SELF-HELP FOR THE ELDERLY</b>									1/1/21 - 6/30/24	
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>										
8	If modification, Effective Date of Mod.										
9	<b>Program: ADRC</b>										
10	Budget Reference Page No.(s)	Revised BUDGET	Original Budget	Modification	Total	Original Budget	Modification	Total	Original Budget	Modification	Total
11	Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/21 - 6/30/22	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24
12	<b>Expenditures</b>										
13	Salaries & Benefits	\$140,020	\$306,280	\$83,232	\$389,512	\$306,280	\$18,734	\$325,014	\$306,280	\$18,734	\$325,014
14	Operating Expenses	\$18,864	\$14,713	(\$301)	\$14,412	\$14,713		\$14,713	\$14,713		\$14,713
15	<b>Subtotal</b>	<b>\$158,884</b>	<b>\$320,993</b>	<b>\$82,931</b>	<b>\$403,924</b>	<b>\$320,993</b>	<b>\$18,734</b>	<b>\$339,727</b>	<b>\$320,993</b>	<b>\$18,734</b>	<b>\$339,727</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$23,859	\$48,149	\$12,440	\$60,589	\$48,149	\$2,810	\$50,959	\$48,149	\$2,810	\$50,959
18	Subcontractor/Capital Expenditures	\$11,912	\$0		\$0	\$0		\$0	\$0		\$0
19	Total Expenditures	\$194,655	\$369,142	\$95,371	\$464,513	\$369,142	\$21,544	\$390,686	\$369,142	\$21,544	\$390,686
20	<b>HSA Revenues</b>										
21											
22	General Fund (87%)	\$169,349	\$321,154		\$321,154	\$321,154		\$321,154	\$321,154		\$321,154
23	Federal Fund (13%)	\$25,306	\$47,988		\$47,988	\$47,988		\$47,988	\$47,988		\$47,988
24	MCO			\$3,827	\$3,827						
25	CODB			\$21,544	\$21,544		\$21,544	\$21,544		\$21,544	\$21,544
26	OTO			\$70,000	\$70,000						
27											
28	TOTAL HSA REVENUES	\$194,655	\$369,142	\$95,371	\$464,513	\$369,142	\$21,544	\$390,686	\$369,142	\$21,544	\$390,686
29	<b>Other Revenues</b>										
30											
31											
32											
33											
34											
35											
36											
37	Total Revenues	\$194,655	\$369,142	\$95,371	\$464,513	\$369,142	\$21,544	\$390,686	\$369,142	\$21,544	\$390,686
38	Full Time Equivalent (FTE)										
40	Prepared by:										
41	HSA-CO Review Signature: _____ Telephone No.:										
42	<b>HSA #1</b>										

	O
1	Index B-1, Page 1
2	9/22/2021
3	
4	
5	
6	
7	
8	
9	
10	Total
11	1/1/21-6/30/24
12	
13	\$1,179,560
14	\$62,702
15	\$1,242,262
16	15%
17	\$186,366
18	\$11,912
19	\$1,440,540
20	
21	
22	\$1,132,811
23	\$169,270
24	\$3,827
25	\$64,632
26	\$70,000
27	
28	\$1,440,540
29	
30	
31	
32	
33	
34	
35	
36	
37	\$1,440,540
38	
40	415-677-7682
41	
42	<b>6/20/2018</b>



	A	B	H	I	J	K	L	M	N	O
1	SELF-HELP FOR THE ELDERLY									Appendix B-1, Page 3
2	Program: ADRC									9/22/2021
3										
4										
5	<b>Operating Expense Detail</b>									
6										
7			REVISED BUDGET	REVISED BUDGET						TOTAL
8	<u>Expenditure Category</u>	TERM	1/1/21 - 6/30/21	7/1/21 - 6/30/22	Modification	Total	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24	
9	Rental of Property		\$4,052	\$8,104	(\$601)	\$7,503	\$8,104	\$8,104	\$27,763	
10	Gas, Phone, Garbage)		\$773	\$1,546		\$1,546	\$1,546	\$1,546	\$5,411	
11	Office Supplies, Postage		\$2,500	\$600		\$600	\$600	\$600	\$4,300	
12	Supplies and Repair		\$3,000	\$563		\$563	\$563	\$563	\$4,689	
13	Printing and Reproduction		\$0						\$0	
14	Insurance		\$1,300	\$1,600		\$1,600	\$1,600	\$1,600	\$6,100	
15	Staff Training		\$0						\$0	
16	Staff Travel-(Local & Out of Town)		\$2,500	\$250		\$250	\$250	\$250	\$3,250	
17	Rental of Equipment		\$339	\$250		\$250	\$250	\$250	\$1,089	
18	<b>CONSULTANTS</b>									
19										
20										
21										
22										
23										
24										
25	<b>OTHER</b>									
26	Communications(cell phone allowances)		\$4,400	\$1,800	\$300	\$2,100	\$1,800	\$1,800	\$10,100	
27										
28										
29										
30										
31										
32	<b>TOTAL OPERATING EXPENSES</b>		\$18,864	\$14,713	(\$301)	\$14,412	\$14,713	\$14,713	\$62,702	
33										
34	<b>HSA #3</b>								<b>6/20/2018</b>	



	A	B	C	D	E	F	G
1	SELF-HELP FOR THE ELDERLY						Appendix B-1, Page 4
2	Program: ADRC						10/20/2020
3							
4							
5	<b>Subcontractor/Capital Expenditures</b>						
6							
7	<b>SUBCONTRACTORS</b>		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
8	Subcontractor 1						
9	Subcontractor 2						
10							
11							
12							
13	<b>TOTAL SUBCONTRACTOR COST</b>						
14							
15							
16	<b>EQUIPMENT</b>		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
17	Units	ITEM/DESCRIPTION					
18	2	Laser Printer	\$1,000				\$1,000
19	2	Portable Printer	\$800				\$800
20	2	Cisco Switch for data & phone	\$4,608				\$4,608
21	1	Cisco Backbone switch	\$977				\$977
22	1	Veeam Backup Replication	\$4,527				\$4,527
23	<b>TOTAL EQUIPMENT COST</b>		\$11,912				\$11,912
24							
25	<b>REMODELING</b>		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
26	Description:						
27	Remodel A						
28							
29							
30							
31							
32	<b>TOTAL REMODELING COST</b>						
33							
34	<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>		\$11,912				\$11,912
35							
36	<b>HSA #4</b>						<b>6/20/2018</b>

<b>Benefits</b>	<b>Rate</b>	<b>\$235,600</b>
FICA	7.65%	\$18,023.40
Workers Comp	0.004	\$942.40
Unemployment Ins	0.006	\$1,413.60
Retirement 403 (B)	3%	\$7,068.00
Health Insurance	3301.43	39617.16
Dental Insurance	311.973	3743.676
		\$70,808.24
		30.05%