



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

**MEMORANDUM**

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)

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** KELLY DEARMAN, EXECUTIVE DIRECTOR

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

**DATE:** DECEMBER 1, 2021

**SUBJECT:** GRANT MODIFICATION: **BERNAL HEIGHTS NEIGHBORHOOD CENTER** (NON-PROFIT) FOR PROVISION OF COMMUNITY SERVICES (see table below)

DS  
JG

	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
<b>GRANT TERM:</b>	01/01/21- 06/30/23	07/01/21- 6/30/23	01/01/21- 06/30/23		
<b>GRANT AMOUNT:</b>	\$1,422,083	\$186,028	\$1,608,111	\$160,810	\$1,768,921
<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$1,463,381		\$144,730	\$160,810	\$1,768,921
<b>PERCENTAGE:</b>	91%		9%		100%



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant agreements with Bernal Heights Neighborhood Center for the provision of community services to older adults and adults with disabilities for the time period beginning July 1, 2021 through June 30, 2023 in the additional amount of \$186,028, plus a 10% contingency for a total not to exceed amount of \$1,768,921. The specific breakdown of funding per location is summarized in the following table.

<b>Location</b>	<b>Current Amount 1/1/2021 - 6/30/2023</b>	<b>Modification</b>	<b>Revised FY 21/22 FY 22/23</b>	<b>Grant Total</b>	<b>10% Contingency</b>	<b>Total Not to Exceed</b>
Cortland	\$601,143	\$98,940	\$322,076 \$252,076	\$700,083	\$70,008	\$770,091
Excelsior	\$820,940	\$87,088	\$373,269 \$323,269	\$908,028	\$90,802	\$998,830
<b>Total</b>	<b>\$1,422,083</b>	<b>\$186,028</b>	<b>\$695,345 \$575,345</b>	<b>\$1,608,111</b>	<b>\$160,810</b>	<b>\$1,768,921</b>

### **Background**

Community connection and engagement is critical to the health, functioning, and increased quality of life for older adults and adults with disabilities in San Francisco. DAS funds Community Centers located throughout San Francisco to provide community services programming intended to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities.

Community services program and activity offerings at DAS funded Community Centers are designed to engage with the community around them while enhancing the cultural, educational, mental, and physical well-being of participants. Community Centers are also the entry point for many older adults and adults with disabilities in need of information and support services, thus translation and social services are available through community services programming.

### **Services to be Provided**

Grantees will operate a Community Center space designed to engage with the surrounding community and be welcoming and accessible for older adults and adults with disabilities. Each grantee will offer a variety of activities, social services, translation assistance, and outreach that are designed to maintain or improve the quality of life of program participants.

### **Modification**

The purpose of this modification is to provide funding for the agency to hire an Administrative & Activities Assistant, who will work full time and receive benefits. This additional funding will increase the agency's ability to heighten focus areas and increase staffing. Under the current COVID-19 restriction guidelines, increased staffing will ensure a safe/compliant reopening and continuation of services.

### **Selection**

Grantee was selected through Request for Proposals #785 which was competitively bid in February 2018.

**Funding**

These grants will be funded through a combination of Federal Funds, Dignity Funds, and other local funds.

**ATTACHMENTS**

- **Bernal Heights Neighborhood Center - Cortland**

  - Appendix A-1 – Services to be provided

  - Appendix B-1 – Budget

- **Bernal Heights Neighborhood Center - Excelsior**

  - Appendix A-1 – Services to be provided

  - Appendix B-1 – Budget

**APPENDIX A-1 – SERVICES TO BE PROVIDED**

***BERNAL HEIGHTS NEIGHBORHOOD CENTER - CORTLAND***

**COMMUNITY SERVICES**

**Effective January 1, 2021 to June 30, 2023**

**Modification: December 1, 2021**

**I. Purpose**

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

**II. Definitions**

Adult with a Disability	Person 18 years of age or older living with a disability
CA 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.
CARBON	Contracts Administration, Reporting and Billing On Line System
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

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.
Grantee	Bernal Heights Neighborhood Center
HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )

Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee's Community Service program and reflected via enrollment in CA GetCare.

### **III. Target Population**

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

### **IV. Eligibility for Community Services**

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

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

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

### **VI. Service Description**

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.

- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts will not be provided under this specific grant.

## **VII. Contractor Responsibilities**

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

\*\*\*Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or

health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

### **VIII. Service Objectives**

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 213 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,400 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 500 units of service of translation.
- Grantee will provide 1,250 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 425 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 2,800 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 1,000 units of service of translation.
- Grantee will provide 2,500 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

### **IX. Outcome Objectives**

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- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.



- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

*These objectives will be evaluated based on the annual participant survey.*

## **X. Reporting and Other Requirements**

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15<sup>th</sup> of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10<sup>th</sup> day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31<sup>st</sup> of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. 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).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. 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.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Tiyana Coleman  
Program Analyst  
Office of Community Partnerships (OCP)  
Human Services Agency  
(415) 557-6631  
[Tiyana.Coleman@sfgov.org](mailto:Tiyana.Coleman@sfgov.org)

or

Steve Kim  
Contract Manager  
Human Services Agency  
(415) 557-6335  
[Steve.Kim@sfgov.org](mailto:Steve.Kim@sfgov.org)

## **XI. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, 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 <b>Bernal Heights Neighborhood Center</b>		Term Jan 2021 - Jun 2023						
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>								
If modification, Effective Date of Mod. 7/1/2021 No. of Mod. 1								
<b>Program: Community Services - Cortland</b>								
Budget Reference Page No.(s)								
	Actual	Original	Modification	Revised	Original	Modification	Revised	Revised
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	Total
<b>Expenditures</b>								
Salaries & Benefits	\$79,580	\$164,251	\$73,430	\$237,681	\$164,251	\$15,520	\$179,771	\$497,032
Operating Expenses	\$29,924	\$42,363	\$22	\$42,385	\$42,363	(\$2,937)	\$39,426	\$111,735
<b>Subtotal</b>	\$109,504	\$206,614	\$73,452	\$280,066	\$206,614	\$12,583	\$219,197	\$608,767
Indirect Percentage (%)	15.00%	15.00%			15.00%			15.00%
Indirect Cost	\$16,427	\$30,992	\$11,018	\$42,010	\$30,992	\$1,887	\$32,879	\$91,316
Subcontractor/Capital Expenditure								
<b>Total Expenditures</b>	\$125,931	\$237,606	\$84,470	\$322,076	\$237,606	\$14,470	\$252,076	\$700,083
<b>HSA Revenues</b>								
General Fund	\$118,803	\$237,606		\$237,606	\$237,606		\$237,606	\$594,015
CODB FY19/20	\$7,128		\$7,128	\$7,128		\$7,128	\$7,128	\$21,384
CODB FY20/21 & FY21/22			\$7,342	\$7,342		\$7,342	\$7,342	\$14,684
OTO Funds (FY21/22)			\$70,000	\$70,000				\$70,000
<b>Total HSA Revenue</b>	\$125,931	\$237,606	\$84,470	\$322,076	\$237,606	\$14,470	\$252,076	\$700,083
<b>Other Revenues</b>								
<b>TOTAL DAS AND NON DAS REVENUE</b>	\$125,931	\$237,606	\$84,470	\$322,076	\$237,606	\$14,470	\$252,076	\$700,083
Full Time Equivalent (FTE)								
Prepared by: Jackie Okamura	Telephone No.: 415-206-2140							
HSA-CO Review Signature:	_____							
<b>HSA #1</b>	<b>12/1/2021</b>							

Program: Community Services - Cortland													Appendix B-1, Page 2
(Same as Line 11 on HSA #1)													
Salaries & Benefits Detail													
Position	Agency Totals		HSA Program		DAS budgeted salary								
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	Original FY21/22	Modification FY21/22	Revised FY21/22	Original FY22/23	Modification FY22/23	Revised FY22/23	Total	
Director of Programs:	\$80,000	1.00	100.00%	0.12	\$4,800	\$9,600	\$10,000	\$19,600	\$9,600	\$10,000	\$19,600	\$44,000	
Senior Services Supervisor	\$52,000	1.00	100.00%	1.00		\$52,000	\$2,000	\$54,000	\$52,000	\$2,000	\$54,000	\$108,000	
Social Services/Volunteer Coordinator	\$47,840	1.00	100.00%	1.00	\$23,920	\$47,840	\$1,160	\$49,000	\$47,840	\$1,160	\$49,000	\$121,920	
Exercise Instructor	\$124,800	1.00	100.00%	0.03	\$1,560	\$3,120		\$3,120	\$3,120		\$3,120	\$7,800	
Exercise Instructor	\$52,000	1.00	100.00%	0.05	\$1,300	\$2,600		\$2,600	\$2,600		\$2,600	\$6,500	
Ass. Program Director	\$63,440	1.00	100.00%	0.30	\$9,516	\$19,032	(\$19,032)		\$19,032	(\$19,032)		\$9,516	
Program Manager					\$5,980		\$18,552	\$18,552		\$18,552	\$18,552	\$43,084	
Social Services/Volunteer Coordinator: I. Ritner-Gill					\$10,672							\$10,672	
Social Services/Volunteer Coordinator: A. Rivera					\$736							\$736	
Admin & Activity Coordinator		0.38	100.00%	0.38			\$47,312	\$47,312				\$47,312	
Totals	\$420,080	6.38	700.00%	2.87	\$58,484	\$134,192	\$59,992	\$194,184	\$134,192	\$12,680	\$146,872	\$399,540	
Fringe Benefits Rate	22.40%												
Employee Fringe Benefits	\$94,098				\$21,096	\$30,059	\$13,438	\$43,497	\$30,059	\$2,840	\$32,899	\$97,492	
<b>Total Salaries and Benefits</b>	\$514,178				\$79,580	\$164,251	\$73,430	\$237,681	\$164,251	\$15,520	\$179,771	\$497,032	
<b>HSA #2</b>												12/1/2021	

**Program: Community Services - Cortland**

(Same as Line 11 on HSA #1)

**Operating Expense Detail**

	Actual 1/1/21 - 6/30/21	Original FY 21/22	Modification FY 21/22	Revised FY21/22	Original FY22/23	Modification FY22/23	Revised FY22/23	Revised Total
<u>Expenditure Category</u>								
Rental of Property								
Utilities (Elec, Water, Gas, Phone, Garbage)	\$2,000	\$4,100		\$4,100	\$4,100		\$4,100	\$10,200
Office Supplies, Postage	\$1,300	\$2,600		\$2,600	\$2,600		\$2,600	\$6,500
Building Maintenance Supplies and Repair	\$4,200	\$8,400		\$8,400	\$8,400		\$8,400	\$21,000
Printing and Reproduction	\$300	\$600		\$600	\$600		\$600	\$1,500
Insurance	\$720	\$1,440		\$1,440	\$1,440		\$1,440	\$3,600
Staff Training	\$1,000	\$3,000		\$3,000	\$3,000		\$3,000	\$7,000
Staff Travel-(Local & Out of Town)	\$1,350	\$2,700		\$2,700	\$2,700		\$2,700	\$6,750
Rental of Equipment	\$400	\$900		\$900	\$900		\$900	\$2,200
<u>Consultant</u>								
Consultant A								
<u>Other</u>								
Program expenses for								
activiteis, food, arts, crafts	\$18,654	\$18,623	\$22	\$18,645	\$18,623	(\$2,937)	\$15,686	\$52,985
<b>Total Operating Expenses</b>	\$29,924	\$42,363	\$22	\$42,385	\$42,363	(\$2,937)	\$39,426	\$111,735
<b>HSA #3</b>								<b>12/1/2021</b>

**APPENDIX A-1 – SERVICES TO BE PROVIDED**

***BERNAL HEIGHTS NEIGHBORHOOD CENTER - EXCELSIOR***

**COMMUNITY SERVICES**

**Effective January 1, 2021 to June 30, 2023**

**Modification: December 1, 2021**

**I. Purpose**

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

**II. Definitions**

Adult with a Disability	Person 18 years of age or older living with a disability
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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.
Grantee	Bernal Heights Neighborhood Center
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LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
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### **III. Target Population**

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- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

### **IV. Eligibility for Community Services**

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

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

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

### **VI. Service Description**

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation

assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

The Outreach and Wellness Coordinator, will conduct wellness calls to existing and past consumers who haven't returned or received services this fiscal year. They will assist with COVID-19 friendly wellness outreach and education about the program and visit housing sites to support existing activities/deliveries.

## **VII. Contractor Responsibilities**

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

\*\*\*Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

### **VIII. Service Objectives**

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve **213** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **1,400** units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide **500** units of service of translation.
- Grantee will provide **1,500** units of service of social services.
- Grantee will provide **720** units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve **425** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **2,800** units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide **1,000** units of service of translation.
- Grantee will provide **3,000** units of service of social services.
- Grantee will provide **1,440** units of service of enhanced outreach.

### **IX. Outcome Objectives**

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.

- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

*These objectives will be evaluated based on the annual participant survey.*

## **X. Reporting and Other Requirements**

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5<sup>th</sup> working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15<sup>th</sup> of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10<sup>th</sup> day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31<sup>st</sup> of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. 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).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. 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.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Tiyana Coleman  
Program Analyst  
Office of Community Partnerships (OCP)  
Human Services Agency  
(415) 557-6631  
[Tiyana.Coleman@sfgov.org](mailto:Tiyana.Coleman@sfgov.org)

or

Steve Kim  
Contract Manager  
Human Services Agency  
(415) 557-6335  
[Steve.Kim@sfgov.org](mailto:Steve.Kim@sfgov.org)

## **XI. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, 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 <b>Bernal Heights Neighborhood Center</b>		Term Jan 2021 - Jun 2023						
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>								
If modification, Effective Date of Mod. 7/1/2021 No. of Mod. 1								
<b>Program: Community Services - Excelsior Center</b>								
Budget Reference Page No.(s)								
	Actual	Original	Modification	Revised	Original	Modification	Revised	Revised
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	Total
<b>Expenditures</b>								
Salaries & Benefits	\$114,024	\$191,501	\$10,244	\$201,745	\$191,501	(\$32,600)	\$158,901	\$474,670
Operating Expenses	\$69,880	\$73,477	\$49,360	\$122,837	\$73,477	\$48,725	\$122,202	\$314,919
<b>Subtotal</b>	<b>\$183,904</b>	<b>\$264,978</b>	<b>\$59,604</b>	<b>\$324,582</b>	<b>\$264,978</b>	<b>\$16,125</b>	<b>\$281,103</b>	<b>\$789,589</b>
Indirect Percentage (%)	15.00%	15.00%			15.00%			15.00%
Indirect Cost	\$27,586	\$39,747	\$8,940	\$48,687	\$39,747	\$2,419	\$42,166	\$118,439
Subcontractor/Capital Expenditure								
<b>Total Expenditures</b>	<b>\$211,490</b>	<b>\$304,725</b>	<b>\$68,544</b>	<b>\$373,269</b>	<b>\$304,725</b>	<b>\$18,544</b>	<b>\$323,269</b>	<b>\$908,028</b>
<b>HSA Revenues</b>								
General Fund	\$202,362	\$304,725		\$304,725	\$304,725		\$304,725	\$811,812
CODB FY19/20	\$9,128		\$9,128	\$9,128		\$9,128	\$9,128	\$27,384
CODB FY20/21 & FY21/22			\$9,416	\$9,416		\$9,416	\$9,416	\$18,832
OTO Funds (FY21/22)			\$50,000	\$50,000				\$50,000
<b>Total HSA Revenue</b>	<b>\$211,490</b>	<b>\$304,725</b>	<b>\$68,544</b>	<b>\$373,269</b>	<b>\$304,725</b>	<b>\$18,544</b>	<b>\$323,269</b>	<b>\$908,028</b>
<b>Other Revenues</b>								
<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$211,490</b>	<b>\$304,725</b>	<b>\$68,544</b>	<b>\$373,269</b>	<b>\$304,725</b>	<b>\$18,544</b>	<b>\$323,269</b>	<b>\$908,028</b>
Full Time Equivalent (FTE)								
Prepared by: Jackie Okamura	Telephone No.: 415-206-2140						Date: 7/8/2021	
HSA-CO Review Signature: _____								
HSA #1								12/1/2021

**Program: Community Services - Excelsior Center**

(Same as Line 11 on HSA #1)

**Salaries & Benefits Detail**

Position	Agency Totals		HSA Program		DAS budgeted salary							Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	Original FY21/22	Modification FY21/22	Revised FY21/22	Original FY22/23	Modification FY22/23	Revised FY22/23	
Director of Program: M. Noboa	\$80,000	1.00	100.00%	0.08	\$3,200	\$6,400	\$15,400	\$21,800	\$6,400	\$15,400	\$21,800	\$46,800
Asst. Program Director: S. Won	\$63,440	1.00	100.00%	0.70	\$22,204	\$44,408	(\$44,408)		\$44,408	(\$44,408)		\$22,204
Social Services Coordinator: Y. Vasquez	\$52,000	1.00	100.00%	1.00	\$31,200	\$52,000	(\$13,660)	\$38,340	\$52,000	(\$13,660)	\$38,340	\$107,880
Social Services Coordinator: Z. Peng	\$47,840	1.00	100.00%	0.63	\$14,950	\$29,900	\$2,080	\$31,980	\$29,900	\$2,080	\$31,980	\$78,910
Senior Program Assistant: Q. Liu	\$41,600	1.00	100.00%	0.50	\$10,400	\$20,800	\$2,080	\$22,880	\$20,800	\$2,080	\$22,880	\$56,160
Outreach Coordinator: G. Reyes	\$47,840	1.00	100.00%	1.00	\$2,369							\$2,369
Outreach Coordinator: C. Aleman		0.50	100.00%	0.50	\$4,784		\$23,920	\$23,920				\$28,704
Admin & Activity Assistant							\$22,800	\$22,800				\$22,800
Totals	\$332,720	6.50	700.00%	4.41	\$89,107	\$153,508	\$8,212	\$161,720	\$153,508	(\$38,508)	\$115,000	\$365,827
Fringe Benefits Rate	24.75%											
Employee Fringe Benefits	\$82,348				\$24,917	\$37,993	\$2,032	\$40,025	\$37,993	\$5,908	\$43,901	\$108,843
<b>Total Salaries and Benefits</b>	\$415,068				\$114,024	\$191,501	\$10,244	\$201,745	\$191,501	(\$32,600)	\$158,901	\$474,670
HSA #2												12/1/2021



**Program: Community Services - Excelsior Center**  
 (Same as Line 11 on HSA #1)

Expenditure Category	Operating Expense Detail							
	Actual 1/1/21 - 6/30/21	Original FY 21/22	Modification FY 21/22	Revised FY21/22	Original FY22/23	Modification FY22/23	Revised FY22/23	Revised Total
Rental of Property	\$20,764	\$41,528		\$41,528	\$41,528		\$41,528	\$103,820
Utilities (Elec, Water, Gas, Phone, Garbage)	\$5,000	\$8,000	\$240	\$8,240	\$8,000	\$240	\$8,240	\$21,480
Office Supplies, Postage	\$1,000	\$2,520	\$14,768	\$17,288	\$2,520	\$12,830	\$15,350	\$33,638
Building Maintenance Supplies and Repair	\$7,500	\$6,380		\$6,380	\$6,380		\$6,380	\$20,260
Printing and Reproduction	\$500	\$1,000		\$1,000	\$1,000		\$1,000	\$2,500
Insurance	\$1,320	\$2,640		\$2,640	\$2,640		\$2,640	\$6,600
Staff Training	\$500	\$2,000	\$250	\$2,250	\$2,000	\$250	\$2,250	\$5,000
Staff Travel-(Local & Out of Town)	\$3,000	\$4,800	\$588	\$5,388	\$4,800	\$588	\$5,388	\$13,776
Rental of Equipment	\$870	\$1,200		\$1,200	\$1,200		\$1,200	\$3,270
<u>Consultant</u>								
<u>Other</u>								
Program expenses for								
activities, food, arts, crafts	\$29,426	\$3,409	\$33,514	\$36,923	\$3,409	\$34,817	\$38,226	\$104,575
<b>Total Operating Expenses</b>	\$69,880	\$73,477	\$49,360	\$122,837	\$73,477	\$48,725	\$122,202	\$314,919
<b>HSA #3</b>								12/1/2021