



Mark Farrell, Mayor

Department of Human Services
 Department of Aging and Adult Services
 Office of Early Care and Education

Trent Rhorer, Executive Director

MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
 JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *JCT*

DATE: JUNE 6, 2018

SUBJECT: GRANT RENEWAL: **MULTIPLE GRANTEES (NON-PROFIT)**
 FOR THE PROVISION OF NATURALIZATION SERVICES FOR
 SENIORS AND ADULTS WITH DISABILITIES (see table on the next
 page)

GRANT TERM:	<u>7/1/18-</u> <u>6/30/19</u>	<u>Contingency</u>	<u>Total</u>		
GRANT AMOUNT:	\$743,134	\$74,313	\$817,447		
FUNDING SOURCE	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
ANNUAL AMOUNT	\$743,134			\$74,313	\$817,447
PERCENTAGE	100%				100%

The Department of Aging and Adult Services requests authorization to renew grant agreements with multiple providers for naturalization services for older adults and adults with disabilities for the time period beginning July 1, 2018 and ending June 30, 2019 in the combined amount of \$743,134 plus a 10% contingency for a total not to exceed amount of \$817,447. The purpose of these grants is to provide services for lawful permanent residents (LPRs) to complete the naturalization process to become U.S. citizens.

Grantee	FY 18/19	10% Contingency	Total Not to Exceed
Centro Latino De San Francisco, Inc.	\$115,503	\$11,550	\$127,053
International Institute Of The Bay Area	\$185,198	\$18,519	\$203,717
Jewish Family And Children's Services	\$81,225	\$8,122	\$89,347
La Raza Centro Legal Inc.	\$43,519	\$4,351	\$47,870
Nihonmachi Legal Outreach DBA API Legal Outreach	\$147,672	\$14,767	\$162,439
Self Help For The Elderly	\$170,017	\$17,001	\$187,018
Total	\$743,134	\$74,313	\$817,447

Background

The primary goal of naturalization services is to help lawful permanent residents (LPRs) to become naturalized citizens of the United States. In 2015, there were 51,000 estimated individuals in the City and County of San Francisco eligible to become U.S. citizens.¹ Helping vulnerable members of this group successfully navigate the complex naturalization process is important for a number of reasons, including:

- Financial Security
- Freedom of Travel
- Ability to vote
- Access to certain government/federal benefits

Services to be Provided

Grantees will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee may offer one or more of the following services as described:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.

¹ Warren, Robert and Donald Kerwin. 2015. "The US Eligible-to-Naturalize Population: Detailed Social and Economic Characteristics." Journal on Migration and Human Security 3(4): 306-29. <http://dx.doi.org/10.14240/jmhs.v3i4.54>.

3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Performance

Grantees received program monitoring and fiscal monitoring as follows:

1. Centro Latino de San Francisco
 - Program: April 2018 - Agency is compliant with no findings.
 - Fiscal: April 2017- Agency is compliant with no findings. Next monitoring scheduled June 2018.
2. International Institute Of The Bay Area
 - Program: April 2018 - Agency is compliant with no findings.
 - Fiscal: March 2018- Agency is compliant with no findings.
3. Jewish Family And Children's Services
 - Program: April 2018 - Agency is compliant with findings resolved.
 - Fiscal: April 2018 - Agency is compliant with no findings.
4. La Raza Centro Legal Inc.
 - Program: April 2018 - Agency is compliant with findings resolved.
 - Fiscal: April 2018 - Findings to be resolved in June 2018.
5. Nihonmachi Legal Outreach DBA API Legal Outreach
 - Program: April 2018 - Agency is compliant with findings resolved.
 - Fiscal: March 2018 - Findings to be resolved in June 2018.
6. Self Help for the Elderly
 - Program: April 2018 - Agency is compliant with no findings.
 - Fiscal: March 2018- Agency is compliant with no findings.

Grantee Selections

Grantees were selected through Request for Proposals (RFP) 635, which was competitively bid in February 2015.

Funding

Funding for these services will be provided through County General Funds.

ATTACHMENTS

Centro Latino De San Francisco, Inc.

Appendix A-Services to be Provided

Appendix B- Program Budget

Appendix F- Site Chart

International Institute of the Bay Area

Appendix A-Services to be Provided

Appendix B- Program Budget

Appendix F- Site Chart

Jewish Family and Children's Services

Appendix A-Services to be Provided

Appendix B- Program Budget

La Raza Centro Legal Inc.

Appendix A-Services to be Provided

Appendix B- Program Budget

Nihonmachi Legal Outreach DBA API Legal Outreach

Appendix A-Services to be Provided

Appendix B- Program Budget

Self Help for the Elderly

Appendix A-Services to be Provided

Appendix B- Program Budget

Appendix F- Site Chart

APPENDIX A – SERVICES TO BE PROVIDED

CENTRO LATINO DE SAN FRANCISCO

NATURALIZATION SERVICES

Effective July 1, 2018 to June 30, 2019

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with 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.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.
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 to others.

Grantee	Centro Latino de San Francisco
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
LGBT	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.
LPR	Lawful Permanent Resident
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.
N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older

OOA	Office on the Aging
Senior	Person who is 60 years or older
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

Services must target clients 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 LGBT Community

IV. Location and Time of Services

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

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.

2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve 750 unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.
- Grantee will serve 145 unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide 557 units of service of Citizenship/ESL class hours.
- Grantee will provide 722 units of service of One-to-One assistance.
- Grantee will provide N/A units of service of Legal Services. (*Agency primarily provides One-to-One assistance for this program*)

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided:

- At least 75% of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose naturalization classes started in previous years.*

The following are new measurements for Fiscal Year 18-19. The results will help track performance and may be used to develop benchmarks in future years:

- Number of N-400s submitted in the fiscal year on behalf of clients.
- Number of N-648s filed in the fiscal year on behalf of clients.
- Quantity of language waivers filed in the fiscal year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming Citizens) in the fiscal year.

VIII. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.
- C. 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 each grant year. This report must be submitted to the CARBON system.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- H. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.

- I. For assistance with reporting requirements or submission of reports, please contact:

Paulo Salta
Program Analyst
DAAS, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120-7988
(415) 355-3551
paulo.salta@sfgov.org

David Kashani
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
(415) 355-3607
david.kashani@sfgov.org

IX. 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; program operation, which includes a review of a written policies and procedures manual of all OOA 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.
- 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
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4				
5	Name	Term		
6	Centro Latino de San Francisco	7/1/18-6/30/19		
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Naturalization			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	Total	
12	Expenditures			
13	Salaries & Benefits	\$79,285	\$79,285	
14	Operating Expenses	\$8,495	\$8,495	
15	Subtotal	\$87,780	\$87,780	
16	Indirect Percentage (%)	0%	0.00%	
17	Indirect Cost (Line 16 X Line 15)	\$0	\$0	
18	Capital/Subcontractor Expenditures	\$27,723	\$27,723	
19	Total Expenditures	\$115,503	\$115,503	
20	HSA Revenues			
21				
22	General Fund	\$115,503	\$115,503	
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$115,503	\$115,503	
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$115,503	\$115,503	
37	Full Time Equivalent (FTE)			
39	Prepared by:	Telephone No.:	Date: 05/10/2018	
40	HSA-CO Review Signature:	_____		
41	HSA #1		10/25/2016	

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10						7/1/18-6/30/19	7/1/18-6/30/19
11							
		Agency Totals		HSA Program		DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary
12	POSITION TITLE						
13	ESL Citizenship Instructor - Maria Sarti	\$46,800	0.88	95%	0.83	\$38,768	\$38,768
14	Executive Director - Gloria Bonilla	\$74,298	0.95	12%	0.11	\$8,292	\$8,292
15	Program Coord. - Javier Barahona	\$41,600	1.00	16%	0.16	\$6,570	\$6,570
16	Accountant - Olivia Riano	\$62,400	0.38	19%	0.07	\$4,349	\$4,349
17	Janitor - Karen Guzman	\$31,200	0.64	19%	0.12	\$3,780	\$3,780
18	Social Worker - Sylvia Rivera	\$45,760	0.88	5%	0.05	\$2,137	\$2,137
19	ESL Citizenship Assistant - TBH	\$33,280	0.13	100%	0.13	\$4,160	\$4,160
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	\$335,338	4.84	265%	1.46	\$68,056	\$68,056
31							
32	FRINGE BENEFIT RATE	17%					
33	EMPLOYEE FRINGE BENEFITS	\$55,331				\$11,229	\$11,229
34							
35							
36	TOTAL SALARIES & BENEFITS	\$390,668				\$79,285	\$79,285
37	HSA #2						10/25/2016

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7	Operating Expense Detail						
8							
9							
10							
11							TOTAL
12	<u>Expenditure Category</u>			TERM	<u>7/1/18-6/30/19</u>		<u>7/1/18-6/30/19</u>
13	Rental of Property						
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$3,890		\$3,890
15	Office Supplies, Postage				\$2,543		\$2,543
16	Building Maintenance Supplies and Repair				\$0		
17	Printing and Reproduction				\$562		\$562
18	Insurance				\$500		\$500
19	Staff Training						
20	Staff Travel-(Local & Out of Town)						
21	Rental of Equipment						
22							
23	CONSULTANTS						
24	Audit Fees				\$1,000		\$1,000
25							
26							
27	OTHER						
28							
29							
30							
31	TOTAL OPERATING EXPENSE				\$8,495		\$8,495
32							
33	HSA #3						10/25/2016

	A	B	C	D
1			Appendix B, Page 4	
2				
3				
4	Program: Naturalization			
5	(Same as Line 9 on HSA #1)			
6		Program Expenditure Detail		
7	SUBCONTRACTORS		7/1/18-6/30/19	7/1/18-6/30/19
8		Mission Neighborhood Center	\$27,723	\$27,723
9				\$0
10				\$0
11	TOTAL SUBCONTRACTOR COST		\$27,723	\$27,723
12				
13	EQUIPMENT		7/1/18-6/30/19	7/1/18-6/30/19
		TERM		
14	No.	ITEM/DESCRIPTION		
15				\$0
16				\$0
17				\$0
18	TOTAL EQUIPMENT COST		\$0	\$0
19				
20	R E M O D E L I N G			
21	Description:		7/1/18-6/30/19	7/1/18-6/30/19
22				\$0
23				\$0
24				\$0
25	TOTAL REMODELING COST		\$0	\$0
26				
27	TOTAL CAPITAL/SUBCONTRACTOR EXPENDITURE		\$27,723	\$27,723
28				
29	HSA #4			10/25/2016

APPENDIX F - SITE CHART
HSA / DAAS / OFFICE ON THE AGING

FISCAL YEAR: 2018-2019

AGENCY: Centro Latino de San Francisco, Inc

CONTRACT MAILING ADDRESS: 1656 15TH Street San Francisco, Ca 04103

DIRECTOR: Gloria Bonilla

PHONE NO.: 415-286-0883

SITES: (Naturalization)	Centro Latino de San Francisco				
Name of Site	Los Mayores				
Address and Zip	1656 15 th Street SF 94103				
Phone Number	415-286-0883				
Fax Number	415-861-8782				
Neighborhood	Mission District				
Muni Line #s	14L, 22, 33, 47, 49 and 71				
Person in Charge	Gloria Bonilla				
Site Manager	Maria Eugenia Sarti				
Programs Offered at Site	Congregate Home Delivered Meals, Community Services and Naturalization				
Days Open	X Mon X Tues X Wed X Thurs X Fri X Sat Sun	Mon ___ Tues ___ Wed ___ Thur ___ Fri ___ Sat ___ Sun	Mon ___ Tues ___ Wed ___ Thur ___ Fri ___ Sat ___ Sun	Mon ___ Tues ___ Wed ___ Thur ___ Fri ___ Sat ___ Sun	
Hours Open	9:00a.m-4:00p.M-Sat. 5:30p.m-7:00p.m Mon.&Wed.				
Hours of <u>scheduled</u> programming	9:30a.m.-11:00a.m/ 5:30p.m.-7:00p.m.				
Hours of meal service	11:30a.m-1:00p.m				
Annual number of meals at site	32,874				
Average number of meals per day	99				
Total number of service days in FY	304				
Days closed	New Year, President's Day, Cesar Chavez Memorial, Independence, Labor, Veteran's, Day After Thanksgiving and Christmas				
ADA Accessible	X Yes ___ No	X Yes ___ No	X Yes ___ No	X Yes ___ No	X Yes ___ No

APPENDIX A – SERVICES TO BE PROVIDED

INTERNATIONAL INSTITUTE OF THE BAY AREA

NATURALIZATION SERVICES

Effective July 1, 2018 to June 30, 2019

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with 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.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.
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 to others.

Grantee	International Institute of the Bay Area
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
LGBT	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.
LPR	Lawful Permanent Resident
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.
N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older

OOA	Office on the Aging
Senior	Person who is 60 years or older
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

Services must target clients 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 LGBT Community

IV. Location and Time of Services

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

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.

2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve **280** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.
- Grantee will serve **80** unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide **140** units of service of Citizenship/ESL class hours.
- Grantee will provide **450** units of service of One-to-One assistance.
- Grantee will provide **480** units of service of Legal Services.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided:

- At least **75%** of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose naturalization classes started in previous years.*

The following are new measurements for Fiscal Year 18-19. The results will help track performance and may be used to develop benchmarks in future years:

- Number of N-400s submitted in the fiscal year on behalf of clients.
- Number of N-648s filed in the fiscal year on behalf of clients.
- Quantity of language waivers filed in the fiscal year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming Citizens) in the fiscal year.

VIII. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.
- C. 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 each grant year. This report must be submitted to the CARBON system.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- H. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- I. For assistance with reporting requirements or submission of reports, please contact:

Paulo Salta
Program Analyst
DAAS, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120-7988
(415) 355-3551
paulo.salta@sfgov.org

David Kashani
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
(415) 355-3607
david.kashani@sfgov.org

IX. 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; program operation, which includes a review of a written policies and procedures manual of all OOA 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.
- 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
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4				
5	Name	Term		
6	International Institute of the Bay Area	7/1/18-6/30/19		
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Naturalization			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	Total	
12	Expenditures			
13	Salaries & Benefits	\$110,034	\$110,034	
14	Operating Expenses	\$52,157	\$52,157	
15	Subtotal	\$162,191	\$162,191	
16	Indirect Percentage (%)	14%	14%	
17	Indirect Cost (Line 16 X Line 15)	\$23,007	\$23,007	
18	Capital/Subcontractor Expenditures	\$0	\$0	
19	Total Expenditures	\$185,198	\$185,198	
20	HSA Revenues			
21				
22	General Fund	\$185,198	\$185,198	
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$185,198	\$185,198	
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$185,198	\$185,198	
37	Full Time Equivalent (FTE)			
39	Prepared by:	Telephone No.:	Date: 05/10/2018	
40	HSA-CO Review Signature: _____			
41	HSA #1		10/25/2016	

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10						7/1/18-6/30/19	7/1/18-6/30/19
11							
		Agency Totals		HSA Program		DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary
12	POSITION TITLE						
13	Immigration Director	\$73,000	1.00	40%	0.40	\$28,835	\$28,835
14	Immigration Caseworker	\$45,900	1.00	40%	0.40	\$18,131	\$18,131
15	Immigration Assistant	\$42,599	1.00	38%	0.38	\$16,124	\$16,124
16	Immigration ESL Teacher	\$57,027	1.00	44%	0.44	\$24,938	\$24,938
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	\$218,526	4.00	161%	1.61	\$88,027	\$88,027
31							
32	FRINGE BENEFIT RATE	25%					
33	EMPLOYEE FRINGE BENEFITS	\$54,631.50				\$22,007	\$22,007
34							
35							
36	TOTAL SALARIES & BENEFITS	\$273,158				\$110,034	\$110,034
37	HSA #2						10/25/2016

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7	Operating Expense Detail						
8							
9							
10							
11							TOTAL
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>		<u>7/1/18-6/30/19</u>
13	Rental of Property				\$39,628		\$39,628
14	Utilities (Elec., Water, Gas, Phone, Scavenger)				\$2,254		\$2,254
15	Office Supplies, Postage				\$2,955		\$2,955
16	Building Maintenance Supplies and Repair						
17	Equipment Lease & Maintenance				\$2,450		\$2,450
18	Insurance				\$1,400		\$1,400
19	Communication				\$1,000		\$1,000
20	Staff Training				\$600		\$600
21	Staff Travel				\$520		\$520
22							
23	CONSULTANTS						
24							
25							
26							
27	OTHER						
28	Abacus Fees				\$1,350		\$1,350
29							
30							
31	TOTAL OPERATING EXPENSE				\$52,157		\$52,157
32							
33	HSA #3						10/25/2016

APPENDIX F - SITE CHART
HSA / DAAS / OFFICE ON THE AGING

FISCAL YEAR: 2018-19

AGENCY: International Institute of the Bay Area (IIBA)

CONTRACT MAILING ADDRESS: 1111 Market Street, 4th Floor, San Francisco, CA 94103

DIRECTOR: Ellen Dumesnil		PHONE NO.: 415-538-8110	
SITES: (Naturalization)			
Name of Site	Main office of the International Institute of the Bay Area (IIBA)	201 Turk St Apartments	
Address and Zip	1111 Market Street, 4 th Floor, San Francisco, CA 94103	201 Turk St. Ground Floor, San Francisco, CA 94102	
Phone Number	415-538-8100		
Fax Number	415-538-8111		
Neighborhood	Tenderloin	Tenderloin	
Muni Line #s	Next to Civic Center BART and Muni station	Next to Civic Center BART and Muni station	
Person in Charge	Ellen Dumesnil	(Contact IIBA)	
Site Manager	" "		
Programs Offered at Site	Immigration Legal Services & Citizenship Classes	Citizenship Classes	
Days Open	X Mon X Tues X Wed X Thurs X Fri Sat Sun	Mon Tues X Wed Thur Fri Sat Sun	Mon Tues Wed Thur Fri Sat Sun
Hours Open	9:00am to 5:00pm	2:00 pm to 3:30 pm	
Hours of scheduled programming	Citizenship classes on Tuesdays from 4:00 to 5:30pm	2:00 pm to 3:30 pm	
Hours of meal service	N/A	N/A	
Annual number of meals at site	N/A	N/A	
Average number of meals per day	N/A	N/A	
Days closed	Major U.S. holidays	Major U.S. holidays	
ADA Accessible	X Yes No	X Yes No	Yes No Yes No

APPENDIX A – SERVICES TO BE PROVIDED

JEWISH FAMILY AND CHILDREN'S SERVICES

NATURALIZATION SERVICES

Effective July 1, 2018 to June 30, 2019

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with 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.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.
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 to others.

Grantee	Jewish Family and Children's Services
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
LGBT	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.
LPR	Lawful Permanent Resident
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.
N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older

OOA	Office on the Aging
Senior	Person who is 60 years or older
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

Services must target clients 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 LGBT Community

IV. Location and Time of Services

JFCS' Naturalization services are based out of their offices at 2534 Judah Street in San Francisco. Services are offered Monday through Friday during regular business hours. Citizenship/ESL classes take place at 2150 Post Street in San Francisco at scheduled and announced intervals.

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve 54 unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.
- Grantee will serve 52 unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide 118 units of service of Citizenship/ESL class hours.
- Grantee will provide N/A units of service of One-to-One assistance.
- Grantee will provide 960 units of service of Legal Services.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided:

- At least 75% of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose naturalization classes started in previous years.*

The following are new measurements for Fiscal Year 18-19. The results will help track performance and may be used to develop benchmarks in future years:

- Number of N-400s submitted in the fiscal year on behalf of clients.
- Number of N-648s filed in the fiscal year on behalf of clients.
- Quantity of language waivers filed in the fiscal year on behalf of clients.
- Quantity of clients completing the Naturalization process (becoming Citizens) in the fiscal year.

VIII. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.
- C. 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 each grant year. This report must be submitted to the CARBON system.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.

- H. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- I. For assistance with reporting requirements or submission of reports, please contact:

Michael Zaugg
Director, Office on the Aging
DAAS
P.O. Box 7988
San Francisco, CA 94120-7988
michael.zaugg@sfgov.org

David Kashani
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
david.kashani@sfgov.org

IX. 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; program operation, which includes a review of a written policies and procedures manual of all OOA 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.
- 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
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4				
5	Name	Term		
6	Jewish Family and Children's Services	7/1/18-6/30/19		
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Naturalization			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	Total	
12	Expenditures			
13	Salaries & Benefits	\$65,301	\$65,301	
14	Operating Expenses	\$7,684	\$7,684	
15	Subtotal	\$72,985	\$72,985	
16	Indirect Percentage (%)	11%	11%	
17	Indirect Cost (Line 16 X Line 15)	\$8,240	\$8,240	
18	Capital/Subcontractor Expenditures	\$0	\$0	
19	Total Expenditures	\$81,225	\$81,225	
20	HSA Revenues			
21				
22	General Fund	\$81,225	\$81,225	
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$81,225	\$81,225	
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$81,225	\$81,225	
37	Full Time Equivalent (FTE)			
39	Prepared by: Traci Dobronravova	Telephone: 415.449.3808	Date: 05/14/2018	
40	HSA-CO Review Signature:	_____		
41	HSA #1			10/25/2016

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10						7/1/18-6/30/19	7/1/18-6/30/19
11							
		Agency Totals		HSA Program		DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary
12	POSITION TITLE						
13	Immigration Attorney	\$84,006	1.00	50%	0.50	\$42,000	\$42,000
14	Legal Assistant	\$42,900	1.00	12%	0.12	\$5,280	\$5,280
15	SAH Director	\$118,482	1.00	3%	0.03	\$3,163	\$3,163
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	\$245,388	3.00	65%	0.65	\$50,443	\$50,443
31							
32	FRINGE BENEFIT RATE	29%					
33	EMPLOYEE FRINGE BENEFITS	\$72,279				\$14,858	\$14,858
34							
35							
36	TOTAL SALARIES & BENEFITS	\$317,667				\$65,301	\$65,301
37	HSA #2						10/25/2016

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7	Operating Expense Detail						
8							
9							
10							
11							TOTAL
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>		<u>7/1/18-6/30/19</u>
13	Rental of Property						
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$1,053		\$1,053
15	Office Supplies, Postage				\$458		\$458
16	Building Maintenance Supplies and Repair				\$1,587		\$1,587
17	Printing and Reproduction						
18	Insurance				\$2,071		\$2,071
19	Staff Training						
20	Staff Travel-(Local & Out of Town)				\$1,077		\$1,077
21	Rental of Equipment						
22							
23	CONSULTANTS						
24							
25							
26							
27	OTHER						
28	INS Zoom Software Licensing Fee				\$360		\$360
29	State Bar/AILA License, Conference, Dues,				\$1,078		\$1,078
30							
31	TOTAL OPERATING EXPENSE				\$7,684		\$7,684
32							
33	HSA #3						10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

LA RAZA CENTRO LEGAL

NATURALIZATION SERVICES

Effective July 1, 2018 to June 30, 2019

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with 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.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.
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 to others.

Grantee	La Raza Centro Legal
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
LGBT	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.
LPR	Lawful Permanent Resident
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.
N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older

OOA	Office on the Aging
Senior	Person who is 60 years or older
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

Services must target clients 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 LGBT Community

IV. Location and Time of Services

La Raza Centro Legal's Naturalization services are provided at their office location, 474 Valencia Street, Suite 295 in San Francisco. Services are provided Monday through Friday during regular business hours.

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history,

government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.

2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve **13** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.
- Grantee will provide **260** units of service of Legal Services.
- Note: One-to-One Assistance and Citizenship/English as a Second Language (ESL) Classes are not provided as a part of this grant.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided:

- At least **75%** of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose naturalization classes started in previous years.*

The following are new measurements for Fiscal Year 18-19. The results will help track performance and may be used to develop benchmarks in future years:

- Number of N-400s submitted in the fiscal year on behalf of clients.
- Number of N-648s filed in the fiscal year on behalf of clients.
- Quantity of language waivers filed in the fiscal year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming Citizens) in the fiscal year.

VIII. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.
- C. 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 each grant year. This report must be submitted to the CARBON system.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- H. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- I. For assistance with reporting requirements or submission of reports, please contact:

Michael Zaugg
Director, Office on the Aging
DAAS
P.O. Box 7988
San Francisco, CA 94120-7988
michael.zaugg@sfgov.org

Esperanza Zapien
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
esperanza.zapien@sfgov.org

IX. 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; program operation, which includes a review of a written policies and procedures manual of all OOA 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.
- 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
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4				
5	Name	Term		
6	La Raza Centro Legal	7/1/18-6/30/19		
7	(Check One) New Renewal <u> x </u> Modification <u> </u>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Naturalization			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	Total	
12	Expenditures			
13	Salaries & Benefits	\$31,160	\$31,160	
14	Operating Expenses	\$7,290	\$7,290	
15	Subtotal	\$38,450	\$38,450	
16	Indirect Percentage (%)	13%	13%	
17	Indirect Cost (Line 16 X Line 15)	\$5,069	\$5,069	
18	Capital/Subcontractor Expenditures	\$0	\$0	
19	Total Expenditures	\$43,519	\$43,519	
20	HSA Revenues			
21				
22	General Fund	\$43,519	\$43,519	
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$43,519	\$43,519	
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$43,519	\$43,519	
37	Full Time Equivalent (FTE)			
39	Prepared by: Jessica Garcia	Telephone No.: 415-553-3407	Date: 05/16/2018	
40	HSA-CO Review Signature: _____			
41	HSA #1		10/25/2016	

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10						7/1/18-6/30/19	7/1/18-6/30/19
11		Agency Totals		HSA Program		DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary
12	POSITION TITLE						
13	Immigration Law Coordinator	\$50,000	1.00	10%	0.10	\$5,000	\$5,000
14	Immigration Attorney	\$46,796	1.00	20%	0.20	\$9,359	\$9,359
15	Immigration Paralegal	\$42,715	1.00	15%	0.15	\$6,407	\$6,407
16	Administrative Assistant II / Immigration Support	\$47,320	1.00	6%	0.06	\$2,839	\$2,839
17					-		
18					-		
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	\$186,832	4.00	51%	0.51	\$23,606	\$23,606
31							
32	FRINGE BENEFIT RATE	32.0%					
33	EMPLOYEE FRINGE BENEFITS	\$59,786				\$7,554	\$7,554
34							
35							
36	TOTAL SALARIES & BENEFITS	\$246,618				\$31,160	\$31,160
37	HSA #2						10/25/2016

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10							
11							
12	Operating Expense Detail						
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>		<u>TOTAL</u>
12							<u>7/1/18-6/30/19</u>
13	Rental of Property				\$2,277		\$2,277
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$120		\$120
15	Office Supplies, Postage				\$224		\$224
16	Building Maintenance Supplies and Repair						
17	Printing and Reproduction				\$110		\$110
18	Insurance				\$1,359		\$1,359
19	Staff Training				\$68		\$68
20	Staff Travel-(Local & Out of Town)				\$55		\$55
21	Rental of Equipment				\$1,265		\$1,265
22							
23	CONSULTANTS						
24	Finance Consultant				\$438		\$438
25	Computer Consultant				\$548		\$548
26	Janitorial Service				\$197		\$197
27	Auditor				\$502		\$502
28							
29	OTHER						
30	Bar Dues				\$98		\$98
31	AILA (American Immigration Lawyers Association)				\$29		\$29
32							
33	TOTAL OPERATING EXPENSE				\$7,290		\$7,290
34							
35	HSA #3						10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

Nihonmachi Legal Outreach, dba API Legal Outreach

NATURALIZATION SERVICES

Effective July 1, 2018 to June 30, 2019

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with 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.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.
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 to others.

Grantee	Nihonmachi Legal Outreach, dba API Legal Outreach
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
LGBT	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.
LPR	Lawful Permanent Resident
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.
N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older

OOA	Office on the Aging
Senior	Person who is 60 years or older
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

Services must target clients 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 LGBT Community

IV. Location and Time of Services

Naturalization Legal Services are provided at Grantee's main office which is located at 1121 Mission Street in San Francisco. Services are provided Monday through Friday during regular business hours. Subcontracted services will take place off-site, within San Francisco, at a place and times to be determined.

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve **43** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.
- Grantee will provide **305** units of service of Legal Services.

Via a subcontract with (subcontractor pending), Grantee will provide the following Service Objectives, on an annual basis, in addition to the ones listed above:

- Grantee will serve **13** unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide **240** units of service of Citizenship/ESL class hours.
- Grantee will provide **58** units of service of One-to-One assistance.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided:

- At least 75% of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose naturalization classes started in previous years.*

The following are new measurements for Fiscal Year 18-19. The results will help track performance and may be used to develop benchmarks in future years:

- Number of N-400s submitted in the fiscal year on behalf of clients.
- Number of N-648s filed in the fiscal year on behalf of clients.
- Quantity of language waivers filed in the fiscal year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming Citizens) in the fiscal year.

VIII. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.
- C. 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 each grant year. This report must be submitted to the CARBON system.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by HSA/DAAS. The due date for submitting the annual summary report is July 10th.

- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- H. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- I. For assistance with reporting requirements or submission of reports, please contact:

Michael Zaugg
Director, Office on the Aging
DAAS
P.O. Box 7988
San Francisco, CA 94120-7988
michael.zaugg@sfgov.org

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
steve.kim@sfgov.org

IX. 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; program operation, which includes a review of a written policies and procedures manual of all OOA 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.
- 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
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4				
5	Name	Term		
6	Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)	7/1/18-6/30/19		
7	(Check One) New Renewal <input checked="" type="checkbox"/> Modification _____			
8	If modification, Effective Date of Mod.	No. of Mod.		
9	Program: Naturalization			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	Total	
12	Expenditures			
13	Salaries & Benefits	\$79,856	\$79,856	
14	Operating Expenses	\$11,706	\$11,706	
15	Subtotal	\$91,562	\$91,562	
16	Indirect Percentage (%)	15%	15.00%	
17	Indirect Cost (Line 16 X Line 15)	\$13,734	\$13,734	
18	Capital/Subcontractor Expenditures	\$42,376	\$42,376	
19	Total Expenditures	\$147,672	\$147,672	
20	HSA Revenues			
21				
22	General Fund	\$147,672	\$147,672	
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$147,672	\$147,672	
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$147,672	\$147,672	
37	Full Time Equivalent (FTE)	4.00		
39	Prepared by:	Telephone No.:	Date: 05/10/2018	
40	HSA-CO Review Signature:	_____		
41	HSA #1		10/25/2016	

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10						7/1/18-6/30/19	7/1/18-6/30/19
11							
		Agency Totals		HSA Program		DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary
12	POSITION TITLE						
13	Staff Attorney(s)	\$54,000	1.00	50%	0.50	\$27,000	\$27,000
14	Paralegal/Legal Assistant	\$46,000	1.00	50%	0.50	\$23,000	\$23,000
15	Translator/Admin Support	\$50,000	1.00	20%	0.20	\$10,000	\$10,000
16	Managing Attorney	\$88,000	1.00	5%	0.05	\$4,400	\$4,400
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	238,000	4.00	125%	1.25	\$64,400	\$64,400
31							
32	FRINGE BENEFIT RATE	24%					
33	EMPLOYEE FRINGE BENEFITS	\$57,120				\$15,456	\$15,456
34							
35							
36	TOTAL SALARIES & BENEFITS	\$295,120				\$79,856	\$79,856
37	HSA #2						10/25/2016

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7	Operating Expense Detail						
8							
9							
10							
11							TOTAL
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>		<u>7/1/18-6/30/19</u>
13	Rental of Property				\$1,759		\$1,759
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$3,184		\$3,184
15	Office Supplies, Postage				\$4,124		\$4,124
16	Building Maintenance Supplies and Repair						
17	Printing and Reproduction						
18	Insurance				\$1,439		\$1,439
19	Staff Training						
20	Staff Travel-(Local & Out of Town)						
21	Rental of Equipment						
22							
23	CONSULTANTS						
24							
25	Audit				\$1,200		\$1,200
26							
27	OTHER						
28							
29							
30							
31	TOTAL OPERATING EXPENSE				\$11,706		\$11,706
32							
33	HSA #3						10/25/2016

	A	B	C	D
1			Appendix B, Page 4	
2				
3				
4	Program: Naturalization			
5	(Same as Line 9 on HSA #1)			
6	Program Expenditure Detail			
7	SUBCONTRACTORS		7/1/18-6/30/19	7/1/18-6/30/19
8		Vietnamese Elderly Mutual Assistance Assoc.	\$42,376	\$42,376
9				
10				
11	TOTAL SUBCONTRACTOR COST		\$42,376	\$42,376
12				
13	EQUIPMENT	TERM	7/1/18-6/30/19	7/1/18-6/30/19
14	No.	ITEM/DESCRIPTION		
15				
16				
17				
18	TOTAL EQUIPMENT COST		\$0	\$0
19				
20	R E M O D E L I N G			
21	Description:		7/1/18-6/30/19	7/1/18-6/30/19
22				
23				
24				
25	TOTAL REMODELING COST		\$0	\$0
26				
27	TOTAL CAPITAL/SUBCONTRACTOR EXPENDITURE		\$42,376	\$42,376
28				
29	HSA #4			10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

SELF-HELP FOR THE ELDERLY

NATURALIZATION SERVICES

Effective July 1, 2018 to June 30, 2019

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with 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.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.
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 to others.

Grantee	Self-Help for the Elderly
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
LGBT	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.
LPR	Lawful Permanent Resident
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.
N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older

OOA	Office on the Aging
Senior	Person who is 60 years or older
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

Services must target clients 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 LGBT Community

IV. Location and Time of Services

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

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.

2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve 560 unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.
- Grantee will serve 560 unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide 2,000 units of service of Citizenship/ESL class hours.
- Grantee will provide 1,600 units of service of One-to-One assistance.
- Grantee will provide N/A units of service of Legal Services. *(Agency primarily provides One-to-One assistance for this program)*

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided:

- At least 75% of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose naturalization classes started in previous years.*

The following are new measurements for Fiscal Year 18-19. The results will help track performance and may be used to develop benchmarks in future years:

- Number of N-400s submitted in the fiscal year on behalf of clients.
- Number of N-648s filed in the fiscal year on behalf of clients.
- Quantity of language waivers filed in the fiscal year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming Citizens) in the fiscal year.

VIII. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.
- C. 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 each grant year. This report must be submitted to the CARBON system.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- H. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.

- I. For assistance with reporting requirements or submission of reports, please contact:

Paulo Salta
Program Analyst
DAAS, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120-7988
(415) 355-3551
paulo.salta@sfgov.org

David Kashani
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
(415) 355-3607
david.kashani@sfgov.org

IX. 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; program operation, which includes a review of a written policies and procedures manual of all OOA 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.
- 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
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4				
5	Name	Term		
6	SELF-HELP FOR THE ELDERLY	7/1/18-6/30/19		
7	(Check One) New Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.	No. of Mod.		
9	Program: Naturalization			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	Total	
12	Expenditures			
13	Salaries & Benefits	\$130,710	\$130,710	
14	Operating Expenses	\$19,548	\$19,548	
15	Subtotal	\$150,258	\$150,258	
16	Indirect Percentage (%)	13%	13%	
17	Indirect Cost (Line 16 X Line 15)	\$19,759	\$19,759	
18	Capital/Subcontractor Expenditures	\$0	\$0	
19	Total Expenditures	\$170,017	\$170,017	
20	HSA Revenues			
21				
22	General Fund	\$170,017	\$170,017	
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$170,017	\$170,017	
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$170,017	\$170,017	
37	Full Time Equivalent (FTE)			
39	Prepared by: Leny Nair	Telephone No.:	Date: 05/10/2018	
40	HSA-CO Review Signature:	_____		
41	HSA #1		10/25/2016	

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10						7/1/18-6/30/19	7/1/18-6/30/19
11		Agency Totals		HSA Program		DAAS	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary
13	Director of Social Services	\$84,945	1.00	20%	0.20	\$16,989	\$16,989
14	Naturalization Program Supervisor	\$55,700	1.00	45%	0.40	\$22,280	\$22,280
15	Citizenship Education Coordinator	\$53,560	1.00	45%	0.45	\$24,102	\$24,102
16	Naturalization Program Specialist	\$50,346	1.00	50%	0.50	\$25,173	\$25,173
17	Special Project Assistant	\$53,560	0.63	63%	0.55	\$18,595	\$18,595
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	\$298,111	4.63	223%	2.10	\$107,139	\$107,139
31							
32	FRINGE BENEFIT RATE	22%					
33	EMPLOYEE FRINGE BENEFITS	\$65,584				\$23,571	\$23,571
34							
35							
36	TOTAL SALARIES & BENEFITS	\$363,695				\$130,710	\$130,710
37	HSA #2						10/25/2016

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Naturalization						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10							
11							
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>		<u>TOTAL</u> <u>7/1/18-6/30/19</u>
13	Rental of Property				\$8,052		\$8,052
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$2,310		\$2,310
15	Office Supplies, Postage				\$921		\$921
16	Building Maintenance Supplies and Repair				\$4,320		\$4,320
17	Printing and Reproduction						
18	Insurance				\$945		\$945
19	Staff Training				\$1,200		\$1,200
20	Staff Travel-(Local & Out of Town)				\$1,800		\$1,800
21	Rental of Equipment						
22							
23	CONSULTANTS						
24							
25							
26							
27	OTHER						
28							
29							
30							
31	TOTAL OPERATING EXPENSE				\$19,548		\$19,548
32							
33	HSA #3						10/25/2016

