



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

**MEMORANDUM**

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

Office of Early Care  
and Education

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

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

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

**DATE:** APRIL 7, 2021

**SUBJECT:** GRANT RENEWALS: VARIOUS AGENCIES (NON-PROFIT) TO PROVIDE INTERGENERATIONAL PROGRAMS FOR OLDER ADULTS AND /OR ADULTS WITH DISABILITES

**GRANT TERM:** 7/01/2021 – 6/30/2023

**GRANT AMOUNTS** See Table Below

<u>Funding Source</u>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$1,332,964			\$133,296	\$1,466,260
<b>PERCENTAGE:</b>	100%				100%

DS  
*EB*



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

The Department of Disability and Aging Services (DAS) requests authorization to renew the existing grant agreements with the grantees listed below for the period of July 1, 2021 to June 30, 2023, in the amount of \$1,332,964 plus a 10% contingency for a total amount not to exceed \$1,466,260. The purpose of the grants is to provide intergenerational programming for older adults and adults with disabilities living in the City and County of San Francisco.

<b>Grantee</b>	<b>Current Annual Amount for FY 19-21</b>	<b>Annual Amount for Renewal FY 21-23</b>	<b>Total for FY 21-23</b>	<b>Contingency</b>	<b>Not to Exceed</b>
<u>Bayview Hunters Point Multipurpose Senior Services (BVHPMSS)</u>	\$96,554	\$96,554	\$193,108	\$19,311	\$212,419
<u>Kimochi</u>	\$101,244	\$101,244	\$202,488	\$20,249	\$222,737
<u>LightHouse</u>	\$30,272	\$30,272	\$60,544	\$6,054	\$66,598
<u>Mission Neighborhood Center</u>	\$67,182	\$67,182	\$134,364	\$13,436	\$147,800
<u>Openhouse</u>	\$216,730	\$216,730	\$433,460	\$43,346	\$476,806
<u>Sequoia Living</u>	\$154,500	\$154,500	\$309,000	\$30,900	\$339,900
<b>Total</b>	<b>\$666,482</b>	<b>\$666,482</b>	<b>\$1,332,964</b>	<b>\$133,296</b>	<b>\$1,466,260</b>

### **Background**

The voters of the City and County of San Francisco passed Proposition I that amended the City Charter to establish the Dignity Fund. The Dignity Fund is a guaranteed funding stream to provide needed services and supports for older adults and adults with disabilities. DAS administers the fund with the goal of maximizing self-sufficiency, safety, and health so older adults and adults with disabilities can remain living in the community for as long as possible and maintain the highest quality of life.

The City Charter Amendment for the Dignity Fund describes a planning cycle, which includes a community needs assessment every four years and a yearly allocation plan for the annual increase to the fund. The Dignity Fund Community Needs Assessment (CNA) dated March of 2018 highlighted a demand for intergenerational programming. As a result, the allocation plan for the City's annual increase to the fund for FY 2018-2019 included intergenerational programming. In February of 2019, DAS presented the six grants listed in the table above to the commission for new intergenerational programs. The commission approved them and since then, each of the grantees has developed and launched an intergenerational program that engages older adults and adults with disabilities. The programs collectively create opportunities for older adults and adults with disabilities for social engagement and community building.

### **Services to be Provided**

The grantees will continue to provide intergenerational programming for older adults and adults with disabilities living in the City and County of San Francisco. The programming will bring together a minimum of two different generations and at least one of the participating generations will be inclusive of older adults or adults with disabilities. The grantees will provide intergenerational programming that is structured, scheduled, and ongoing. The grantees will offer activities that promote joint engagement by each of the generations involved, encourage relationship building between the participating generations that is mutually

beneficial, and are face to face when it is permissible and doing so does not compromise the health and safety of program participants.

Please refer to attached Appendices A and B for each grantee for more detailed information regarding service objectives, outcome objectives, and budget.

**Performance**

The Human Services Agency (HSA) conducted a FY19-20 Citywide Fiscal and Compliance Monitoring for Bayview Hunters Point and Openhouse. Both grantees satisfied the findings we reported for FY 19/20. Fiscal monitoring was not required for Lighthouse, Mission Neighborhood and Sequoia Living because they received a waiver for FY 19-20 because there were no findings for the previous year. Monitoring for Kimochi for FY19-20 was not completed and postponed due to COVID-19. There were no findings for the monitoring conducted on 01/17/2019 for FY 18-19.

DAS OCP conducted FY 2019-2020 program monitoring using a virtual platform for all of the grantees in August of 2020 due to COVID-19. There were no findings identified for any of the grantees.

**Selection**

Grantees were selected through Request for Proposal #806, which was competitively bid in August 20, 2018.

**Funding**

Funding for these grants is provided by County General Funds.

**ATTACHMENTS**

Appendix A – Services to be Provided – BVHPMSS

Appendix B – Budget Summary – BVHPMSS

Appendix F – Site Chart – BVHPMSS

Appendix A – Services to be Provided – Kimochi

Appendix B – Budget Summary – Kimochi

Appendix F – Site Chart – Kimochi

Appendix A – Services to be Provided – Lighthouse

Appendix B – Budget Summary – Lighthouse

Appendix F – Site Chart – Lighthouse

Appendix A – Services to be Provided – Mission Neighborhood Center

Appendix B – Budget Summary – Mission Neighborhood Center

Appendix F – Site Chart – Mission Neighborhood Center

Appendix A – Services to be Provided – Openhouse

Appendix B – Budget Summary – Openhouse

Appendix F – Site Chart – Openhouse

Appendix A – Services to be Provided – Sequoia Living

Appendix B – Budget Summary – Sequoia Living

Appendix F – Site Chart – Sequoia Living

**APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE**

**BAYVIEW HUNTERS POINT MULTIPURPOSE SENIOR SERVICES**

**INTERGENERATIONAL PROGRAM**

**July 1, 2021 – June 30, 2023**

**I. Purpose**

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with a generation other than their own with a goal of fostering interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement.

**II. Definitions**

Grantee	Bayview Hunters Point Multipurpose Senior Services
Adult with a Disability	A person 18-59 years of age living with a disability
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result 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, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individuals or others.
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of

	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older; used interchangeably with the term “senior”
Senior	Person who is 60 years of age or older; used interchangeably with the “older adult”
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender

	identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the intergenerational programming provided by the grantee and reflected in CA.GetCare through program enrollment.

### **III. Target Population**

The target population is older adults and adults with disabilities living in the City and County of San Francisco.

Grantee shall additionally target services to members of one or more of the following groups identified as demonstrating the greatest economic and social need:

1. Low income
2. Limited or no English speaking proficiency
3. Minority populations
4. Frail
5. LGBTQ+

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

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

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

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

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face to face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.

2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.
3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

**VII. Service Objectives**

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below. One unit of service equals one hour of intergenerational programming provided.

Table A Service Objectives	<b>FY 2021- 2022</b>	<b>FY 2022- 2023</b>
Number of Unduplicated Consumers	100	150
Number of Intergenerational Programming Hours	450	602

**VIII. Outcome Objectives**

1. Consumers develop new relationships or friendships. Target: 80%.



2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **IX. Reporting and Other Requirements**

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using a DAS OCP approved intake form into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
  - Number of unduplicated consumers enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

tahir.shaikh@sfgov.org  
Contract Manager, HSA OCM  
Or  
tiffany.kearney@sfgov.org  
Program Analyst, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	<b>Bayview Hunters Point Multipurpose</b>		7/1/21-6/30/23	
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	<b>Program: Intergenerational</b>			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$79,053	\$79,053	\$158,106
14	Operating Expenses	\$8,724	\$8,724	\$17,448
15	<b>Subtotal</b>	<b>\$87,777</b>	<b>\$87,777</b>	<b>\$175,554</b>
16	Indirect Percentage (%)	10%	10%	10%
17	Indirect Cost (Line 16 X Line 15)	\$8,777	\$8,777	\$17,554
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$96,554	\$96,554	\$193,108
20	<b>HSA Revenues</b>			
21	General Fund	\$96,554	\$96,554	\$193,108
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$96,554	\$96,554	\$193,108
30	<b>Other Revenues</b>			
31				
32				
33				
34				
35				
36	Total Revenues	\$96,554	\$96,554	\$193,108
37	Full Time Equivalent (FTE)			
39	Prepared by:	Telephone No.:		
40	HSA-CO Review Signature:	_____		
41	<b>HSA #1</b>	<b>12/2/2020</b>		

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	<b>Bayview Hunters Point Multipurpose</b>							
4	<b>Program: Intergenerational</b>							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11						7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
		Agency Totals		HSA Program		DAS	DAS	TOTAL
		Annual Full TimeSalary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	Program Coord.	\$56,560	1.00	100%	1.00	\$56,560	\$56,560	\$113,120
14	Program Tech. Support	\$52,000	1.00	10%	0.10	\$5,200	\$5,200	\$10,400
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS	\$108,560	2.00	110%	1.10	\$61,760	\$61,760	\$123,520
31								
32	FRINGE BENEFIT RATE	28%						
33	EMPLOYEE FRINGE BENEFITS	\$30,396				\$17,293	\$17,293	\$34,586
34								
35								
36	TOTAL SALARIES & BENEFITS	\$138,956				\$79,053	\$79,053	\$158,106
37	<b>HSA #2</b>							<b>12/2/2020</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3	<b>Bayview Hunters Point Multipurpose</b>									
4	<b>Program: Intergenerational</b>									
5										
6										
7	<b>Operating Expense Detail</b>									
8										
9										
10										
11										
12	<u>Expenditure Category</u>			TERM	<u>7/1/21-6/30/22</u>		<u>7/1/22-6/30/23</u>			TOTAL <u>7/1/21-6/30/23</u>
13	Rental of Property									
14	Utilities(Elec, Water, Gas, Phone, Garbage)									
15	Office Supplies, Postage				\$800		\$800			\$1,600
16	Building Maintenance Supplies and Repair									
17	Printing and Reproduction									
18	Insurance				\$1,300		\$1,300			\$2,600
19	Staff Training									
20	Staff Travel-(Local & Out of Town)									
21	Rental of Equipment									
22										
23	<b>CONSULTANTS</b>									
24	CONSULTANTS				\$3,600		\$3,600			\$7,200
25										
26										
27	<b>OTHER</b>									
28	program supplies				\$3,024		\$3,024			\$6,048
29										
30										
31	<b>TOTAL OPERATING EXPENSE</b>				<b><u>\$8,724</u></b>		<b><u>\$8,724</u></b>			<b><u>\$17,448</u></b>
32										
33	<b>HSA #3</b>									<b>12/2/2020</b>

Date: 3/19/2021		SITE CHART - Intergenerational Program			FY: 7/1/2021-6/30/2022	
AGENCY: Bayview Hunters Point Multipurpose Senior Services						
CONTRACT MAILING ADDRESS: 1753 Carroll St., San Francisco, CA 94124				Agency's web site: <a href="https://bhpmss.org/">https://bhpmss.org/</a>		
DIRECTOR: Cathy Davis, MSW, Executive Director			PHONE NO.: 415-822-1444			
<b>Program: Intergenerational Program</b>						
<b>SITES: Name of Site</b>						
Dr. George Davis Senior Center						
Address and Zip						
1753 Carroll St. San Francisco, CA 94124						
Phone Number						
415-822-1444						
Fax Number						
415-822-5327						
Neighborhood						
Bayview Hunters Point						
Supervisorial District No.						
10						
Site Manager/Coordinator						
William Rhodes						
Additional Programs Offered at Site						
Always Active, Arts & Crafts, Brown Bag, Computer Classes, Health Education, Food Giveaways, Exercise, Choir, Music Events, Trips, Special Events, ADRC site, Cong Meals						
Days Open						
<u>X Mon X Tues X Wed</u>						
<u>X Thurs X Fri</u>						
<u>X Sat Sun</u>						
Hours Open						
9:00a.m. - 5:00p.m., M-W-F 8:00a.m. - 8:00 p.m., T & Th 9:00a.m. - 4:00p.m. Sat						
New Year's Day, Martin Luther Kind Jr., Veterans Day, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day+one						
ADA Accessible						
<u> X </u> Yes <u> </u> No						

Date: 3/19/2021		Appendix F-SITE CHART - Intergenerational Programs			FY: 7/1/2022-6/30/2023	
AGENCY: Bayview Hunters Point Multipurpose Senior Services						
CONTRACT MAILING ADDRESS: 1753 Carroll St., San Francisco, CA 94124				Agency's web site: <a href="https://bhpmss.org/">https://bhpmss.org/</a>		
DIRECTOR: Cathy Davis, MSW		Executive Director		PHONE NO.: 415-822-1444		
<b>Program:</b>						
<b>Intergenerational Program</b>						
<b>SITES: Name of Site</b>		Dr. George Davis Senior Center				
Address and Zip		1753 Carroll St. San Francisco, CA 94124				
Phone Number		415-822-1444				
Fax Number		415-822-5327				
Neighborhood		Bayview Hunters Point				
Supervisory District No.		10				
Site Manager/Coordinator		William Rhodes				
Additional Programs Offered at Site		Always Active, Arts & Crafts, Brown Bag, Computer Classes, Health Education, Food Giveaways, Exercise, Choir, Music Events, Trips, Special Events, ADRC site, Cong Meals				
Days Open		<u>X Mon X Tues X Wed</u> <u>X Thurs X Fri</u> <u>X Sat Sun</u>				
Hours Open		9:00a.m. - 5:00p.m., M-W-F 8:00a.m. - 8:00 p.m., T & Th 9:00a.m. - 4:00p.m. Sat				
Days Closed (list holidays closed)		New Year's Day, Martin Luther Kind Jr., Veterans Day, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day+one				
ADA Accessible		<u>X</u> Yes <u>    </u> No				

## APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

### KIMOCHI INC.

#### INTERGENERATIONAL PROGRAM

**July 1, 2021 – June 30, 2023**

#### I. Purpose

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with a generation other than their own with a goal of fostering interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement.

#### II. Definitions

Grantee	Kimochi Inc.
Adult with a Disability	A person 18-59 years of age living with a disability
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	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older; used interchangeably with the term “senior”
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	identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the intergenerational programming provided by the grantee and reflected in CA.GetCare through program enrollment.

### **III. Target Population**

The target population is older adults and adults with disabilities living in the City and County of San Francisco.

Grantee shall additionally target services to members of one or more of the following groups identified as demonstrating the greatest economic and social need:

1. Low income
2. Limited or no English speaking proficiency
3. Minority populations
4. Frail
5. LGBTQ+

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

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

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

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

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face to face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.

2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.
3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

**VII. Service Objectives**

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below. One unit of service equals one hour of intergenerational programming provided.

Table A Service Objectives	<b>FY 2021- 2022</b>	<b>FY 2022- 2023</b>
Number of Unduplicated Consumers	100	100
Number of Intergenerational Programming Hours	570	570

**VIII. Outcome Objectives**

1. Consumers develop new relationships or friendships. Target: 80%.

2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **IX. Reporting and Other Requirements**

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using a DAS OCP approved intake form into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
  - Number of unduplicated consumers enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

tahir.shaikh@sfgov.org  
Contract Manager, HSA OCM  
Or  
tiffany.kearney@sfgov.org  
Program Analyst, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	Kimochi, Inc.		7/1/21-6/30/23	
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	<b>Program: Intergenerational</b>			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/21 - 6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$50,000	\$50,000	\$100,000
14	Operating Expenses	\$25,044	\$25,044	\$50,088
15	<b>Subtotal</b>	<b>\$75,044</b>	<b>\$75,044</b>	<b>\$150,088</b>
16	Indirect Percentage (%)	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$11,200	\$11,200	\$22,400
18	Subcontractor/Capital Expenditures	\$15,000	\$15,000	\$30,000
19	Total Expenditures	\$101,244	\$101,244	\$202,488
20	<b>HSA Revenues</b>			
21	General Fund	\$101,244	\$101,244	\$202,488
22				
23				
24	TOTAL HSA REVENUES	\$101,244	\$101,244	\$202,488
25	<b>Other Revenues</b>			
26				
27				
28				
29	Total Revenues	\$101,244	\$101,244	\$202,488
30	Full Time Equivalent (FTE)			
32	Prepared by: Rod Valdepenas		Telephone No.: 415-931-2294	
33	HSA-CO Review Signature: _____			
34	<b>HSA #1</b>			<b>3/5/2021</b>

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	<b>Kimochi, Inc.</b>							
4	<b>Program: Intergenerational</b>							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11						7/1/21 - 6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
12		Agency Totals		HSA Program		DAS	DAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	CARE Program Specialist	\$40,000	1.00	100%	1.00	\$40,000	\$40,000	\$80,000
14								
15								
16								
27								
28								
29								
30	TOTALS	\$40,000	1.00	100%	1.00	\$40,000	\$40,000	\$80,000
31								
32	FRINGE BENEFIT RATE	25%						
33	EMPLOYEE FRINGE BENEFITS	\$10,000				\$10,000	\$10,000	\$20,000
34								
35								
36	TOTAL SALARIES & BENEFITS	\$50,000				\$50,000	\$50,000	\$100,000
37	<b>HSA #2</b>	<b>3/5/2021</b>						

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3	<b>Kimochi, Inc.</b>									
4	<b>Program: Intergenerational</b>									
7	<b>Operating Expense Detail</b>									
8										
12	<u>Expenditure Category</u>			TERM	<u>7/1/21 - 6/30/22</u>		<u>7/1/22-6/30/23</u>		<u>7/1/21-6/30/23</u>	
13	Professional - Accounting				<u>\$1,000</u>		<u>\$1,000</u>		<u>\$2,000</u>	
14	Utilities(Elec, Water, Gas, Phone, Garbage)				<u>\$11,000</u>		<u>\$11,000</u>		<u>\$22,000</u>	
15	Office Supplies, Postage				<u>\$3,044</u>		<u>\$3,044</u>		<u>\$6,088</u>	
16	Computer/Website				<u>\$3,000</u>		<u>\$3,000</u>		<u>\$6,000</u>	
17	Printing and Reproduction				<u>\$3,000</u>		<u>\$3,000</u>		<u>\$6,000</u>	
18	Insurance				<u>\$2,500</u>		<u>\$2,500</u>		<u>\$5,000</u>	
19	Staff Training				<u>\$750</u>		<u>\$750</u>		<u>\$1,500</u>	
20	Staff Travel-(Local & Out of Town)				<u>\$750</u>		<u>\$750</u>		<u>\$1,500</u>	
21										
22										
23	<b>CONSULTANTS</b>									
24										
25										
26										
27	<b>OTHER</b>									
28										
29										
30										
31	<b>TOTAL OPERATING EXPENSE</b>				<b><u>\$25,044</u></b>		<b><u>\$25,044</u></b>		<b><u>\$50,088</u></b>	
32										
33	<b>HSA #3</b>									<b>3/5/2021</b>



	A	B	C	D	E
1					Appendix B, Page 4
2					
3		<b>Kimochi, Inc.</b>			
4		<b>Program: Intergenerational</b>			
5					
6					
7					
8		<b>Subcontractor/Capital Expenditures</b>			
9					
10		<b>SUBCONTRACTORS</b>	7/1/21 - 6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
11		Japanese Community Youth Council	\$15,000	\$15,000	\$30,000
12					
13					
14					
15					
16		<b>TOTAL SUBCONTRACTOR COST</b>	\$15,000	\$15,000	\$30,000
17					
18					
19		<b>EQUIPMENT</b>			
		<b>TERM</b>	7/1/21 - 6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
20	Units	ITEM/DESCRIPTION			
21					
22					
23					
24					
25		<b>TOTAL EQUIPMENT COST</b>	\$0	\$0	\$0
26					
27		<b>OTHER</b>	7/1/21 - 6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
28		Description:			
29					
30					
31					
32		<b>TOTAL REMODELING COST</b>	\$0	\$0	\$0
33					
34		<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	\$15,000	\$15,000	\$30,000

Date: 3/19/21		SITE CHART			FY: 2022-2023	
AGENCY: KIMOCHI, INC.				Appendix F		
CONTRACT MAILING ADDRESS: 1715 BUCHANAN STREET SF, CA 94115			Agency's web site: <a href="https://www.kimochi-inc.org/">https://www.kimochi-inc.org/</a>			
DIRECTOR: STEVE ISHII		PHONE NO.: 415-931-2294				
<b>Program: Kimochi CARE Program Intergenerational Program</b>						
<b>SITES: Name of Site</b>	KIMOCHI ADMINISTRATION	KIMOCHI LOUNGE	KIMOCHI SENIOR CENTER	JCYC CHIBI CHAN PRESCHOOL		
Address and Zip	1715 BUCHANAN STREET SF, CA 94115	1581 WEBSTER STREET #202 SF, CA 94115	1840 SUTTER STREET SF, CA 94115	2507 PINE STREET SF, CA 94115		
Phone Number	(415) 931-2294	(415) 563-5626	(415)931-2287	(415) 351-0955		
Fax Number	(415) 931-2299	(415) 931-2299	(415)931-2299	(415) 351-0950		
Neighborhood	WESTERN ADDITION	WESTERN ADDITION	WESTERN ADDITION	WESTERN ADDITION		
Supervisorial District No.	5	5	5	5		
Site Manager/Coordinator	SHAWNE O'CONNELL	SHAWNE O'CONNELL	SHAWNE O'CONNELL	SHAWNE O'CONNELL		
Additional Programs Offered at Site	COMMTY SERVICE, FCSP, CM	COMMUNITY SERVICE	C1, C2, COMMUNITY SERVICES, TRANSPORTATION			
Days Open	<u>X</u> Mon <u>X</u> Tues <u>X</u> Wed	<u>X</u> Mon <u>X</u> Tues <u>X</u> Wed	<u>X</u> Mon <u>X</u> Tues <u>X</u> Wed	<u>X</u> Mon <u>X</u> Tues <u>X</u> Wed		
	<u>X</u> Thurs <u>X</u> Fri	<u>X</u> Thurs <u>X</u> Fri	<u>X</u> Thurs <u>X</u> Fri	<u>X</u> Thurs <u>X</u> Fri		
	<u>  </u> Sat <u>  </u> Sun	<u>X</u> Sat <u>X</u> Sun	<u>  </u> Sat <u>  </u> Sun	<u>  </u> Sat <u>  </u> Sun		
Hours Open	9:00 a.m. – 5:00 p.m.	Sun-Mon 11:00 a.m. -5:00 p.m., Tue-Sat 4:00 p.m. - 7:00 p.m.	2:00 p.m. - 4:00 p.m.	2:30 p.m. - 5:00 p.m.		
Days Closed (list holidays closed)	Agency Holidays: New Year's Day, Indigineous Peoples day, President's Day, Memorial Day, Labor Day, Independence Day, MLK Day, Veteran's Day, Thanksgiving and day after, Christmas Day	Agency Holidays: New Year's Day, Indigineous Peoples day, President's Day, Memorial Day, Labor Day, Independence Day, MLK Day, Veteran's Day, Thanksgiving and day after, Christmas Day	Agency Holidays: New Year's Day, Indigineous Peoples day, President's Day, Memorial Day, Labor Day, Independence Day, MLK Day, Veteran's Day, Thanksgiving and day after, Christmas Day	Agency Holidays: New Year's Day, Indigineous Peoples day, President's Day, Memorial Day, Labor Day, Independence Day, MLK Day, Veteran's Day, Thanksgiving and day after, Christmas Day		
ADA Accessible	<u>X</u> Yes <u>  </u> No	<u>X</u> Yes <u>  </u> No	<u>X</u> Yes <u>  </u> No	<u>X</u> Yes <u>  </u> No		

**APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE**  
**LIGHTHOUSE FOR THE BLIND AND VISUALLY IMPAIRED**  
**INTERGENERATIONAL PROGRAM**

**July 1, 2021 – June 30, 2023**

**I. Purpose**

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with a generation other than their own with a goal of fostering interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement.

**II. Definitions**

Grantee	LightHouse for the Blind and Visually Impaired
Adult with a Disability	A person 18-59 years of age living with a disability
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result 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, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individuals or others.
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of

	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older; used interchangeably with the term “senior”
Senior	Person who is 60 years of age or older; used interchangeably with the “older adult”
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	identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the intergenerational programming provided by the grantee and reflected in CA.GetCare through program enrollment.

### **III. Target Population**

The target population is older adults and adults with disabilities living in the City and County of San Francisco.

Grantee shall additionally target services to members of one or more of the following groups identified as demonstrating the greatest economic and social need:

1. Low income
2. Limited or no English speaking proficiency
3. Minority populations
4. Frail
5. LGBTQ+

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

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

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

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

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved. The programming offered should also consist of the following key elements:
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  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face to face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.

2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.
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5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

**VII. Service Objectives**

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Table A Service Objectives	<b>FY 2021- 2022</b>	<b>FY 2022- 2023</b>
Number of Unduplicated Consumers	40	50
Number of Intergenerational Programming Hours	400	500

**VIII. Outcome Objectives**

1. Consumers develop new relationships or friendships. Target: 80%.

2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **IX. Reporting and Other Requirements**

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using a DAS OCP approved intake form into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
  - Number of unduplicated consumers enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

tahir.shaikh@sfgov.org  
Contract Manager, HSA OCM  
Or  
tiffany.kearney@sfgov.org  
Program Analyst, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
  
2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.



	A	B	C	D
1	Appendix B, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	<b>Lighthouse</b>		7/1/21-6/30/23	
7	(Check One)    New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	<b>Program: Intergenerational</b>			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$26,324	\$26,324	\$52,648
14	Operating Expenses	\$0	\$0	\$0
15	<b>Subtotal</b>	\$26,324	\$26,324	\$52,648
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$3,947.58	\$3,947.58	\$7,896
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$30,272	\$30,272	\$60,544
20	<b>HSA Revenues</b>			
21	General Fund	\$30,272	\$30,272	\$60,544
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$30,272	\$30,272	\$60,544
30	<b>Other Revenues</b>			
31				
32				
33				
34				
35				
36	Total Revenues	\$30,272	\$30,272	\$60,544
37	Full Time Equivalent (FTE)			
39	Prepared by:	Telephone No.:		
40	HSA-CO Review Signature:	_____		
41	<b>HSA #1</b>	<b>12/2/2020</b>		

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	<b>Lighthouse</b>							
4	<b>Program: Intergenerational</b>							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11						7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
		Agency Totals		HSA Program		DAS	DAS	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Director, Enchanted Hills Camp & Retreat - TF	\$108,535	1.00	5%	0.05	\$5,427	\$5,427	\$10,854
14	Youth Service Coordinator - JG	\$54,656	1.00	27%	0.27	\$14,639	\$14,639	\$29,278
15	Administrative Assistant - JA	\$44,850	1.00	5%	0.05	\$2,243	\$2,243	\$4,486
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS	\$208,040	3.00	37%	0.37	\$22,309	\$22,309	\$44,618
31								
32	FRINGE BENEFIT RATE	18%						
33	EMPLOYEE FRINGE BENEFITS	\$37,447				\$4,015	\$4,015	\$8,030
34								
35								
36	TOTAL SALARIES & BENEFITS	\$245,487				\$26,324	\$26,324	\$52,648
37	<b>HSA #2</b>	<b>12/2/2020</b>						

Date: 3/19/21		Appendix F-SITE CHART - Intergenerational Program			FY: 7/1/2021-6/30/2022	
AGENCY: Lighthouse for the Blind and Visually Impaired						
CONTRACT MAILING ADDRESS: 1155 Market Street, 10th Fl., 94103				Agency's web site: lighthouse-sf.org		
CEO: Bryan Bashin			PHONE NO.: 415-431-1481			
<b>Program:</b> <b>Intergenerational Program</b>						
<b>SITES: Name of Site</b>						
Lighthouse for the Blind and Visually Impaired						
Address and Zip						
1155 Market Street, 10th Floor, 94103						
Phone Number						
415-431-1481						
Fax Number						
415-863-7568						
Neighborhood						
Mid Market						
Supervisory District No.						
6						
Site Director						
Anthony Fletcher						
Additional Programs Offered at Site						
Community Services, Tech Training, Daily Living, Counseling, Braille, White Cane Mobility, Youth Enrichment						
Days Open						
<u>X Mon X Tues X Wed</u>						
<u>X Thurs X Fri</u>						
<u>X Sat Sun</u>						
Hours Open						
8:00 a.m. - 6:00 p.m.						
Days Closed (list holidays closed)						
New Year's Day, Martin Luther King Jr., President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Dec 25th - 31st, Fifth Saturdays						
ADA Accessible						
<u>X</u> Yes <u>    </u> No						

## APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

### MISSION NEIGHBORHOOD CENTERS INC.

#### INTERGENERATIONAL PROGRAM

**July 1, 2021 – June 30, 2023**

#### I. Purpose

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with a generation other than their own with a goal of fostering interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement.

#### II. Definitions

Grantee	Mission Neighborhood Centers Inc.
Adult with a Disability	A person 18-59 years of age living with a disability
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result 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, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individuals or others.
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of

	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older; used interchangeably with the term “senior”
Senior	Person who is 60 years of age or older; used interchangeably with the “older adult”
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender

	identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the intergenerational programming provided by the grantee and reflected in CA.GetCare through program enrollment.

### **III. Target Population**

The target population is older adults and adults with disabilities living in the City and County of San Francisco.

Grantee shall additionally target services to members of one or more of the following groups identified as demonstrating the greatest economic and social need:

1. Low income
2. Limited or no English speaking proficiency
3. Minority populations
4. Frail
5. LGBTQ+

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

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

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

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

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face to face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.

2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.
3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

**VII. Service Objectives**

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below. One unit of service equals one hour of intergenerational programming provided.

Table A Service Objectives	<b>FY 2021- 2022</b>	<b>FY 2022- 2023</b>
Number of Unduplicated Consumers	80	80
Number of Intergenerational Programming Hours	138	138

**VIII. Outcome Objectives**

1. Consumers develop new relationships or friendships. Target: 80%.

2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **IX. Reporting and Other Requirements**

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using a DAS OCP approved intake form into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
  - Number of unduplicated consumers enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

tahir.shaikh@sfgov.org  
Contract Manager, HSA OCM  
Or  
tiffany.kearney@sfgov.org  
Program Analyst, DAS OCP



## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	Mission Neighborhood Centers, Inc		1/1/21-6/30/22	
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	<b>Program: Intergenerational Program</b>			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$28,193	\$28,193	\$56,386
14	Operating Expenses	\$12,574	\$12,574	\$25,148
15	<b>Subtotal</b>	<b>\$40,767</b>	<b>\$40,767</b>	<b>\$81,534</b>
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$6,115	\$6,115	\$12,230
18	Subcontractor/Capital Expenditures	\$20,300	\$20,300	\$40,600
19	Total Expenditures	\$67,182	\$67,182	\$134,364
20	<b>HSA Revenues</b>			
21	General Fund	\$67,182	\$67,182	\$134,364
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$67,182	\$67,182	\$134,364
30	<b>Other Revenues</b>			
31				
32				
33				
34				
35				
36	Total Revenues	\$67,182	\$67,182	\$134,364
37	Full Time Equivalent (FTE)			
39	Prepared by: <b>Aurora Alvarado</b>		Telephone No.: <b>415.624.7070</b>	
40	HSA-CO Review Signature: _____			
41	HSA #1			12/2/2020

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	<b>Mission Neighborhood Centers, Inc</b>							
4	<b>Program: Intergenerational Program</b>							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11						7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
		Agency Totals		HSA Program		DAS	DAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	Activities & Outreach Specialist	\$52,000	1.00	15%	0.15	\$7,504	\$7,504	\$15,008
14	Community Services & Act Speciali	\$52,000	1.00	10%	0.10	\$5,360	\$5,360	\$10,720
15	Information and Assistance Special	\$52,000	1.00	2%	0.02	\$1,040	\$1,040	\$2,080
16	Senior Program Manager	\$68,640	1.00	13%	0.13	\$7,783	\$7,783	\$15,566
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	<b>TOTALS</b>	\$224,640	4.00	40%	0.40	\$21,687	\$21,687	\$43,374
31								
32	FRINGE BENEFIT RATE	30%						
33	EMPLOYEE FRINGE BENEFITS	\$67,392				\$6,506	\$6,506	\$13,012
34								
35								
36	<b>TOTAL SALARIES &amp; BENEFITS</b>	\$292,032				\$28,193	\$28,193	\$56,386
37	<b>HSA #2</b>							<b>12/2/2020</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3	<b>Mission Neighborhood Centers, Inc</b>									
4	<b>Program: Intergenerational Program</b>									
5										
6										
7	<b>Operating Expense Detail</b>									
8										
9										
10										
11										
12	<u>Expenditure Category</u>			TERM	<u>7/1/21-6/30/22</u>		<u>7/1/22-6/30/23</u>			TOTAL <u>7/1/21-6/30/23</u>
13	Rental of Property				\$800		\$880			\$1,680
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$550		\$700			\$1,250
15	Office Supplies, Postage				\$1,000		\$1,100			\$2,100
16	Building Maintenance Supplies and Repair				\$800		\$900			\$1,700
17	Printing and Reproduction				\$600		\$600			\$1,200
18	Insurance				\$600		\$700			\$1,300
19	Staff Training									
20	Staff Travel-(Local & Out of Town)									
21	Rental of Equipment									
22										
23	<b>CONSULTANTS</b>									
24										
25										
26										
27	<b>OTHER</b>									
28	Fuel Maint & repairs				\$500		\$550			\$1,050
29	Advertising				\$800		\$850			\$1,650
30	Program Supplies				\$3,924		\$3,194			\$7,118
31	Food Supplies				\$1,800		\$1,900			\$3,700
32	Janitorial Supplies				\$1,200		\$1,200			\$2,400

	A	B	C	D	E
1					Appendix B, Page 4
2					
3	<b>Mission Neighborhood Centers, Inc</b>				
4	<b>Program: Intergenerational Program</b>				
5					
6					
7					
8	<b>Subcontractor/Capital Expenditures</b>				
9					
10	<b>SUBCONTRACTORS</b>		7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
11	Music Instructor		\$6,000	\$6,000	\$12,000
12	Nutritionist Consultant		\$4,800	\$4,800	\$9,600
13	Support Session Facilitator		\$6,750	\$6,750	\$13,500
14	Technology Instructor		\$2,750	\$2,750	\$5,500
15	<b>TOTAL SUBCONTRACTOR COST</b>		\$20,300	\$20,300	\$40,600
16					
17					
18	<b>EQUIPMENT</b>	<b>TERM</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
19	Units	ITEM/DESCRIPTION			
20					
21					
22					
23					
24	<b>TOTAL EQUIPMENT COST</b>		\$0	\$0	\$0
25					
26	<b>OTHER</b>		7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
27	Description:				
28	Remodel A				
29					
30					
31	<b>TOTAL REMODELING COST</b>		\$0	\$0	\$0
32					
33	<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>		<b>\$20,300</b>	<b>\$20,300</b>	<b>\$40,600</b>
34					
35	<b>HSA #4</b>				12/2/2020

Date: 3/19/2021		Appendix F-SITE CHART			FY: 7/1/2021-6/30/2022	
AGENCY: Mission Neighborhood Centers, Inc						
CONTRACT MAILING ADDRESS: 362 Capp St San Francisco, CA 94110			Agency's web site:	<a href="http://www.mncsf.org">www.mncsf.org</a>		
DIRECTOR: Maria Bermudez		PHONE NO.: (415) 206-7749				
<b>Program: Weaving Hearts Intergenerational Program</b>						
SITES: Name of Site	Mission Neighborhood Centers					
Address and Zip	362 Capp St SF, CA 94110					
Phone Number	(415) 206-7750					
Fax Number	(415) 647-6911					
Neighborhood	Mission					
Supervisorial District No.	9					
Site Manager/Coordinator	Aurora Alvarado					
Additional Programs Offered at Site	Community & Social Services, Congregate Meals, Exercise Classes, Computer Classes, Nutrition Classes, Psychoeducation, Health Screenings, Recreational Activities, Food Bank Distribution					
Days Open	X Mon X Tues X Wed	Mon ___ Tues ___ Wed	Mon ___ Tues ___ Wed	Mon ___ Tues ___ Wed	Mon ___ Tues ___ Wed	Mon ___ Tues ___ Wed
	X Thurs X Fri	___ Thurs ___ Fri	___ Thurs ___ Fri	___ Thurs ___ Fri	___ Thurs ___ Fri	___ Thurs ___ Fri
	X Sat ___ Sun	___ Sat ___ Sun	___ Sat ___ Sun	___ Sat ___ Sun	___ Sat ___ Sun	___ Sat ___ Sun
Hours Open	9:00 am - 5:00 pm					
Days Closed (list holidays closed)	<ul style="list-style-type: none"> <li>• New Year's Day</li> <li>• Martin Luther King</li> <li>• Presidents Day</li> <li>• Cesar Chavez</li> <li>• Memorial Day</li> <li>• Independence Day</li> <li>• Labor Day</li> <li>• Veterans Day</li> <li>• Thanksgiving</li> <li>• Day after Thanksgiving</li> <li>• Christmas Day</li> </ul>					
ADA Accessible	X Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No

Date: 3/19/2021		SITE CHART			FY: 7/1/2022-6/30/2023	
AGENCY: Mission Neighborhood Centers, Inc		Appendix F				
CONTRACT MAILING ADDRESS: 362 Capp St San Francisco, CA 94110		Agency's web site:		<a href="http://www.mncsf.org">www.mncsf.org</a>		
DIRECTOR: Maria Bermudez		PHONE NO.: (415) 206-7749				
<b>Program: Weaving Hearts Intergenerational Program</b>						
SITES: Name of Site	Mission Neighborhood Centers					
Address and Zip	362 Capp St SF, CA 94110					
Phone Number	(415) 206-7750					
Fax Number	(415) 647-6911					
Neighborhood	Mission					
Supervisorial District No.	9					
Site Manager/Coordinator	Aurora Alvarado					
Additional Programs Offered at Site	Community & Social Services, Congregate Meals, Exercise Classes, Computer Classes, Nutrition Classes, Psychoeducation, Health Screenings, Recreational Activities, Food Bank Distribution					
Days Open	X Mon X Tues X Wed	Mon ___ Tues ___ Wed	Mon ___ Tues ___ Wed	Mon ___ Tues ___ Wed	Mon ___ Tues ___ Wed	Mon ___ Tues ___ Wed
	X Thurs X Fri	___ Thurs ___ Fri	___ Thurs ___ Fri	___ Thurs ___ Fri	___ Thurs ___ Fri	___ Thurs ___ Fri
	X Sat ___ Sun	___ Sat ___ Sun	___ Sat ___ Sun	___ Sat ___ Sun	___ Sat ___ Sun	___ Sat ___ Sun
Hours Open	9:00 am - 5:00 pm					
Days Closed (list holidays closed)	<ul style="list-style-type: none"> <li>• New Year's Day • Martin Luther King</li> <li>• Presidents Day • Cesar Chavez</li> <li>• Memorial Day</li> <li>• Independence Day • Labor Day</li> <li>• Veterans Day • Thanksgiving</li> <li>• Day after Thanksgiving</li> <li>• Christmas Day</li> </ul>					
ADA Accessible	X Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No	___ Yes ___ No

## APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

### OPENHOUSE

### INTERGENERATIONAL PROGRAM

**July 1, 2021 – June 30, 2023**

#### I. Purpose

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with a generation other than their own with a goal of fostering interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement.

#### II. Definitions

Grantee	Openhouse
Adult with a Disability	A person 18-59 years of age living with a disability
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result 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, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individuals or others.
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of



	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older; used interchangeably with the term “senior”
Senior	Person who is 60 years of age or older; used interchangeably with the “older adult”
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender

	identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the intergenerational programming provided by the grantee and reflected in CA.GetCare through program enrollment.

### **III. Target Population**

The target population is older adults and adults with disabilities living in the City and County of San Francisco.

Grantee shall additionally target services to members of one or more of the following groups identified as demonstrating the greatest economic and social need:

1. Low income
2. Limited or no English speaking proficiency
3. Minority populations
4. Frail
5. LGBTQ+

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

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

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

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

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face to face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.

2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.
3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

**VII. Service Objectives**

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below. One unit of service equals one hour of intergenerational programming provided.

Table A Service Objectives	<b>FY 2021- 2022</b>	<b>FY 2022- 2023</b>
Number of Unduplicated Consumers	160	175
Number of Intergenerational Programming Hours	1430	1575

**VIII. Outcome Objectives**

1. Consumers develop new relationships or friendships. Target: 80%.

2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **IX. Reporting and Other Requirements**

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using a DAS OCP approved intake form into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
  - Number of unduplicated consumers enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

tahir.shaikh@sfgov.org  
Contract Manager, HSA OCM  
Or  
tiffany.kearney@sfgov.org  
Program Analyst, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
  
2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	<b>Openhouse</b>		7/1/21-6/30/23	
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	<b>Program: Intergenerational Programs for Older Adults and Adults With Disabilities</b>			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$99,862	\$99,862	\$199,724
14	Operating Expenses	\$5,290	\$5,290	\$10,580
15	<b>Subtotal</b>	<b>\$105,152</b>	<b>\$105,152</b>	<b>\$210,304</b>
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$15,772	\$15,771.77	\$31,544
18	Subcontractor/Capital Expenditures	\$95,806	\$95,806	\$191,612
19	Total Expenditures	\$216,730	\$216,730	\$433,460
20	<b>HSA Revenues</b>			
21	General Fund	\$216,730	\$216,730	\$433,460
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$216,730	\$216,730	\$433,460
30	<b>Other Revenues</b>			
31				
32				
33				
34				
35				
36	Total Revenues	\$216,730	\$216,730	\$433,460
37	Full Time Equivalent (FTE)			
39	Prepared by: Matthew Cimino	Telephone No.: 415-530-2783		
40	HSA-CO Review Signature:	_____		
41	<b>HSA #1</b>	<b>12/2/2020</b>		

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	<b>Openhouse</b>							
4	<b>Program: Intergenerational Programs for Older Adults and Adults With Disabilities</b>							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11						7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
		Agency Totals		HSA Program		DAS	DAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	Comm. Sup. Svc Mgr	\$75,000	1.00	59%	0.59	\$44,181	\$44,181	\$88,362
14	Comm. Eng. Coordinator	\$50,461	1.00	32%	0.32	\$16,000	\$16,000	\$32,000
15	Mgr. of Comm. Engagement	\$80,000	1.00	29%	0.29	\$23,037	\$23,037	\$46,074
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS	\$205,461	3.00	119%	1.19	\$83,218	\$83,218	\$166,436
31								
32	FRINGE BENEFIT RATE	20%						
33	EMPLOYEE FRINGE BENEFITS	\$41,092				\$16,644	\$16,644	\$33,288
34								
35								
36	TOTAL SALARIES & BENEFITS	\$246,553				\$99,862	\$99,862	\$199,724
37	<b>HSA #2</b>	<b>12/2/2020</b>						

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3	<b>Openhouse</b>									
4	<b>Program: Intergenerational Programs for Older Adults and Adults With Disabilities</b>									
5										
6										
7	<b>Operating Expense Detail</b>									
8										
9										
10										
11										
12	<u>Expenditure Category</u>			TERM	<u>7/1/21-6/30/22</u>		<u>7/1/22-6/30/23</u>		TOTAL	<u>7/1/21-6/30/23</u>
13	Rental of Property								\$	-
14	Utilities(Elec, Water, Gas, Phone, Garbage)								\$	-
15	Office Supplies, Postage								\$	-
16	Building Maintenance Supplies and Repair								\$	-
17	Printing and Reproduction								\$	-
18	Insurance								\$	-
19	Staff Training								\$	-
20	Staff Travel-(Local & Out of Town)								\$	-
21	Rental of Equipment								\$	-
22										
23	<b>CONSULTANTS</b>									
24									\$	-
25										
26										
27	<b>OTHER</b>									
28	Elder Youth Brunch				\$5,290		\$5,290		\$	10,580
29										
30										
31	<b>TOTAL OPERATING EXPENSE</b>				<b>\$ 5,290</b>		<b>\$ 5,290</b>		<b>\$</b>	<b>10,580</b>
32										
33	<b>HSA #3</b>									<b>12/2/2020</b>



	A	B	C	D	E
1					
2					
3		<b>Openhouse</b>			
4		<b>Program: Intergenerational Programs for Older Adults and Adults With Disabilities</b>			
5					
6					
7					
8		<b>Subcontractor/Capital Expenditures</b>			
9					
10		<b>SUBCONTRACTORS</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
11	UCSF		63,570	63,570	\$127,140
12	Little Brothers Friends of the Elderly		32,236	32,236	\$64,472
13					
14					
15					
16		<b>TOTAL SUBCONTRACTOR COST</b>	\$95,806	\$95,806	\$191,612
17					
18					
19		<b>EQUIPMENT</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
20	Units	ITEM/DESCRIPTION			
21		Equipment A			
22					
23					
24					
25		<b>TOTAL EQUIPMENT COST</b>	\$0	\$0	\$0
26					
27		<b>OTHER</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
28	Description:				
29	Remodel A				
30					
31					
32		<b>TOTAL REMODELING COST</b>	\$0	\$0	\$0
33					
34		<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	\$95,806	\$95,806	\$191,612
35					
36		<b>HSA #4</b>			12/2/2020

Date: 3/19/21		Appendix F-SITE CHART		FY: 2021-2022	
AGENCY: Openhouse					
CONTRACT MAILING ADDRESS: 65 Laguna Street, San Francisco CA 94102		Agency's web site:		<a href="http://www.openhouse-sf.org">www.openhouse-sf.org</a>	
Executive Director: Maritza Penagos (interim)				PHONE NO.: 415.728.1095	
<b>Program: Intergenerational Program</b>					
<b>SITES: Name of Site</b>		Openhouse Bob Ross LGBT Senior Center		Openhouse Community Space	
Address and Zip		65 Laguna St., San Francisco, CA 94102		75 Laguna St., San Francisco, CA 94102	
Phone Number		415.296.8995		415.296.8995	
Fax Number		415.296.8008		415.296.8008	
Neighborhood		Castro/Hayes Valley/Mission		Castro/Hayes Valley/Mission	
Supervisory District No.		8		8	
Person in Charge:					
Program Manager/Coordinator		Sylvia Vargas		Sylvia Vargas	
Additional Programs Offered at Site		Community Services; Housing Assistance and Counseling; Case Management; ADRC; Friendly Visitor; Lifelong Learning; Health and Wellness; Community Engagement Programming		Community Services; Housing Assistance and Counseling; Case Management; ADRC; Friendly Visitor; Lifelong Learning; Health and Wellness; Community Engagement Programming	
Days Open		<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed		<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed	
		<input checked="" type="checkbox"/> Thurs <input type="checkbox"/> Fri		<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	
		<input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun		<input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun	
Hours Open		9:30AM-5:30PM		9:30AM-5:30PM	
Days Closed (list holidays closed)		Holidays closed: New Year's Day, MLK, President's Day, Memorial Day, Day after SF Pride, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day		Holidays closed: New Year's Day, MLK, President's Day, Memorial Day, Day after SF Pride, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day	
ADA Accessible		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No	

Date: 3/19/21		Appendix F-SITE CHART		FY: 2022-2023	
AGENCY: Openhouse					
CONTRACT MAILING ADDRESS: 65 Laguna Street, San Francisco CA 94102		Agency's web site:		<a href="http://www.openhouse-sf.org">www.openhouse-sf.org</a>	
Executive Director: Maritza Penagos (interim )				PHONE NO.: 415.728.1095	
<b>Program: Intergenerational Program</b>					
<b>SITES: Name of Site</b>					
	Openhouse Bob Ross LGBT Senior Center	Openhouse Community Space			
Address and Zip	65 Laguna St., San Francisco, CA 94102	75 Laguna St., San Francisco, CA 94102			
Phone Number	415.296.8995	415.296.8995			
Fax Number	415.296.8008	415.296.8008			
Neighborhood	Castro/Hayes Valley/Mission	Castro/Hayes Valley/Mission			
Supervisory District No.	8	8			
Person in Charge:	Karyn Skulkety PhD, <i>Executive Director</i>	Karyn Skulkety PhD, <i>Executive</i>			
Site Manager/Coordinator	Matthew Cimino, <i>Director of Operations</i>	Matthew Cimino, <i>Director of</i>			
Additional Programs Offered at Site	Community Services; Housing Assistance and Counseling; Case Management; ADRC; Friendly Visitor; Lifelong Learning; Health and Wellness; Community Engagement Programming	Community Services; Housing Assistance and Counseling; Case Management; ADRC; Friendly Visitor; Lifelong Learning; Health and Wellness; Community Engagement Programming			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed			
	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri			
	<input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun			
Hours Open	9:30AM-5:30PM	9:30AM-5:30PM			
Days Closed (list holidays closed)	Holidays closed: New Year's Day, MLK, President's Day, Memorial Day, Day after SF Pride, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day	Holidays closed: New Year's Day, MLK, President's Day, Memorial Day, Day after SF Pride, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day			
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

## APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

### SEQUOIA LIVING

#### INTERGENERATIONAL PROGRAM

**July 1, 2021 – June 30, 2023**

#### **I. Purpose**

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with a generation other than their own with a goal of fostering interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement.

#### **II. Definitions**

Grantee	Sequoia Living
Adult with a Disability	A person 18-59 years of age living with a disability
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result 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, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individuals or others.
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of

	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older; used interchangeably with the term “senior”
Senior	Person who is 60 years of age or older; used interchangeably with the “older adult”
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender

	identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the intergenerational programming provided by the grantee and reflected in CA.GetCare through program enrollment.

### **III. Target Population**

The target population is older adults and adults with disabilities living in the City and County of San Francisco.

Grantee shall additionally target services to members of one or more of the following groups identified as demonstrating the greatest economic and social need:

1. Low income
2. Limited or no English speaking proficiency
3. Minority populations
4. Frail
5. LGBTQ+

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

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

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

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

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face to face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.

2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.
3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

**VII. Service Objectives**

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below. One unit of service equals one hour of intergenerational programming provided.

Table A Service Objectives	<b>FY 2021- 2022</b>	<b>FY 2022- 2023</b>
Number of Unduplicated Consumers	150	188
Number of Intergenerational Programming Hours	300	376

**VIII. Outcome Objectives**

1. Consumers develop new relationships or friendships. Target: 80%.

2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **IX. Reporting and Other Requirements**

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using a DAS OCP approved intake form into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
  - Number of unduplicated consumers enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

tahir.shaikh@sfgov.org  
Contract Manager, HSA OCM  
Or  
tiffany.kearney@sfgov.org  
Program Analyst, DAS OCP



## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
  
2. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	<b>Sequoia Living</b>		7/1/21-6/30/23	
7	(Check One)    New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	<b>Program: Intergenerational</b>			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$104,710	\$109,986	\$214,696
14	Operating Expenses	\$29,638	\$24,362	\$54,000
15	<b>Subtotal</b>	<b>\$134,348</b>	<b>\$134,348</b>	<b>\$268,696</b>
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$20,152	\$20,152	\$40,304
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$154,500	\$154,500	\$309,000
20	<b>HSA Revenues</b>			
21	General Fund	\$154,500	\$154,500	\$309,000
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$154,500	\$154,500	\$309,000
30	<b>Other Revenues</b>			
31				
32				
33				
34				
35				
36	Total Revenues	\$154,500	\$154,500	\$309,000
37	Full Time Equivalent (FTE)			
39	Prepared by:	Telephone No.:		
40	HSA-CO Review Signature:	_____		
41	<b>HSA #1</b>	<b>12/2/2020</b>		

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	<b>Sequoia Living</b>							
4	<b>Program: Intergenerational</b>							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11						7/1/21-6/30/22	7/1/22-6/30/23	7/1/21-6/30/23
		Agency Totals		HSA Program		DAS	DAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	Volunteer Coordinator	\$77,563	1.00	100%	1.00	\$77,563	\$81,471	\$159,034
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS	\$77,563	1.00	100%	1.00	\$77,563	\$81,471	\$159,034
31								
32	FRINGE BENEFIT RATE	35%						
33	EMPLOYEE FRINGE BENEFITS	\$27,147				\$27,147	\$28,515	\$55,662
34								
35								
36	TOTAL SALARIES & BENEFITS	\$104,710				\$104,710	\$109,986	\$214,696
37	<b>HSA #2</b>							<b>12/2/2020</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3	<b>Sequoia Living</b>									
4	<b>Program: Intergenerational</b>									
5										
6										
7	<b>Operating Expense Detail</b>									
8										
9										
10										
11	TOTAL									
12	<u>Expenditure Category</u>			TERM	<u>7/1/21-6/30/22</u>		<u>7/1/22-6/30/23</u>			<u>7/1/21-6/30/23</u>
13	Rental of Property									
14	Utilities(Elec, Water, Gas, Phone, Garbage)									
15	Office Supplies (rolling white board for ESL) postag				\$500		\$500			\$1,000
16	Building Maintenance Supplies and Repair									
17	Printing and Reproduction				\$850		\$850			\$1,700
18	Insurance									
19	Staff Training				\$200		\$200			\$400
20	Staff Travel-(Local & Out of Town)				\$500		\$500			\$1,000
21	Rental of Equipment									
22										
23	<b>CONSULTANTS</b>									
24	Voice of Witness 2021-2022 Partnership				\$15,000		\$15,000			\$30,000
25										
26										
27	<b>OTHER</b>									
28	Virtual arts facilitation costs/stipends				\$1,000		\$1,000			\$2,000
29	Art and other educational program supplies				\$1,500		\$700			\$2,500
30	Snacks for social distanced/education programs				\$1,088		\$1,012			\$2,100
31	Technology - Loaner tablets and Data Plans				\$9,000		\$4,600			\$13,600
32										
33	<b>TOTAL OPERATING EXPENSE</b>				<b><u>\$29,638</u></b>		<b><u>\$24,362</u></b>			<b><u>\$54,000</u></b>
34										
35	<b>HSA #3</b>									<b>12/2/2020</b>

Date: 3/19/21		Appendix F-SITE CHART - Intergenerational Program			FY: 7/1/2022-6/30/2023 page 1 of 3	
AGENCY: Sequoia Living						
CONTRACT MAILING ADDRESS: 1525 Post Street, San Francisco, CA 94109				Agency's web site: <a href="https://sequoialiving.org/">https://sequoialiving.org/</a>		
DIRECTOR: Sue Dichter			PHONE NO.: 415-351-3641			
<b>Program:</b> Intergenerational Program						
<b>SITES: Name of Site</b>						
	Western Park Apartments	Eastern Park Apartments	Parkview Terraces	Mary Helen Rogers	Rosa Park	
Address and Zip	1280 Laguna St. 94115	711 Eddy St. 94109	871 Turk St. 94102	701 Golden Gate Ave. 94102	1251 Turk St. 94115	
Phone Number	415-202-2947	415-775-5052	415-346-2101	415-934-1001	415-567-0393	
Fax Number	415-922-9457	415-776-0536	415-346-2209	415-934-1002	415-567-0403	
Neighborhood	Western Addition	Tenderloin	Western Addition	Western Addition	Western Addition	
Supervisory District No.	5	6	5	5	5	
Program Coordinator	Taryn Patterson	Taryn Patterson	Taryn Patterson	Taryn Patterson	Taryn Patterson	
Additional Programs Offered at Site	Affordable housing & Resident Service Coordination	Affordable housing & Resident Service Coordination	Affordable housing & Resident Service Coordination	Affordable housing & Resident Service Coordination	Affordable housing & Resident Service Coordination	
Days Open - Services staff available	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri
Hours Open	8:30 - 4:30	8:30 - 4:30	8:30 - 4:30	8:30 - 4:30	8:30 - 4:30	
Days Closed (list holidays closed)	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas	
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	