



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org



London Breed
Mayor

Trent Rhorer
Executive Director

TO: DISABILITY AND AGING SERVICES COMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, ACTING DIR. OF CONTRACTS

DS
EE

DATE: JANUARY 06, 2021

SUBJECT: **NEW GRANTS:** MULTIPLE GRANTEES (NON-PROFIT)
FOR AGING AND DISABILITY RESOURCE CENTERS
(see table below)

GRANT TERM:	1/1/2021 – 6/30/2024	<u>Contingency</u>	<u>Total</u>		
GRANT AMOUNT:	\$5,096,908	\$509,691	\$5,606,599		
Funding source:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
Funding amount:	\$4,587,217	\$509,691	\$509,691	\$5,606,599	
Percentage:	90%	10%		100%	

The Department of Disability and Aging Services requests authorization to enter into new grant agreements with multiple providers for the provision of Aging and Disability Resource Centers (ADRC) for the time period beginning January 1, 2021 and ending June 30, 2024 in the combined amount of \$5,096,908, plus a 10% contingency for a total not to exceed amount of \$5,606,599. The funding amounts are detailed in the following table:



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Grantee	FY 20/21¹ Annually for 3 years² Total	10% Contingency	Not to exceed
Bayview Senior Services	\$69,202 \$139,824 \$488,674	\$48,867	\$537,541
Catholic Charities	\$45,166 \$91,441 \$319,489	\$31,949	\$351,438
Golden Gate Senior Services	\$63,250 \$126,500 \$442,750	\$44,275	\$487,025
Institute on Aging	\$61,011 \$132,327 \$457,992	\$45,799	\$503,791
Mission Neighborhood Centers	\$58,275 \$111,843 \$393,804	\$39,380	\$433,184
On Lok	\$87,966 \$157,643 \$560,895	\$56,090	\$616,985
Openhouse	\$51,472 \$104,102 \$363,778	\$36,378	\$400,156
Self-Help for the Elderly	\$182,443 \$369,142 \$1,289,869	\$128,987	\$1,418,856
Sequoia Living	\$79,744 \$159,488 \$558,208	\$55,821	\$614,029
Toolworks, Inc.	\$30,058 \$63,797 \$221,449	\$22,145	\$243,594
Total	\$728,587 \$1,456,107 \$5,096,908	\$509,691	\$5,606,599

¹ 1/1/2021 – 6/30/2021

² 7/1/2021 – 6/30/2022, 7/1/2022 – 6/30/2023, 7/1/2023 – 6/30/2024

Background

The Aging and Disability Resource Center serves as a one-stop shop for information, referral, assistance, and translation services throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. Specifically, ADRCs around the



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City provide services that assist people to continue living independently in the community, connecting them with long-term services and supports. ADRCs are located throughout the City and each ADRC has trained staff and on-site supervisors.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts in San Francisco. Some districts have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. Each ADRC must demonstrate the capability to serve older people and adults with disabilities in their supervisory district and neighboring districts, if applicable.

Services to be Provided

Aging and Disability Resource Center (ADRC):

The ADRC provides one-stop shop access to information, referral, assistance, and translation services for older people, adults with disabilities, and caregivers at key neighborhood locations. ADRC staff work in multiple sites which are already hubs for older people and adults with disabilities accessing other services. The ADRC staff provide services a minimum of 5 days a week. An additional Citywide ADRC Coordinator meets with staff employed by ADRC sites on a weekly and monthly basis. This coordinator is responsible for providing training, clinical consultation, and executing an outreach plan for the ADRC sites. The Citywide ADRC Coordinator and on-site supervisor meet monthly to avoid any issues of dual consultation/support.

Grantee	District(s)	Unduplicated clients	
		Older adults	Adults w/ disabilities
Bayview Senior Services	5, 10	4,500	700
Catholic Charities	11	4,010	330
Golden Gate Senior Services	1	5,250	520
Mission Neighborhood Centers	9	4,650	510
On Lok	8	5,663	983
Openhouse	8	3,885	455
Self-Help for the Elderly	3, 4, 7	16,800	1,640
Sequoia Living	2, 6	6247	630
Toolworks, Inc.	Citywide ³	1,260	2,940

³ Citywide ADRC focused on adults with disabilities



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Citywide ADRC Coordinator:

The Citywide ADRC Coordinator contributes to the knowledge, helps develop skills, and consults on the performance of ADRC staff working with seniors and adults with disabilities. The coordinator works with ADRC staff on offering information and referral, assistance, and follow-up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff. The specifics of either consultation model are worked out with each specific agency. This flexibility allows for the service model to respond to the culture of each organization.

The Citywide ADRC Coordinator provides resources by bringing together ADRC staff from a variety of agencies for group and individual consultation meetings and administrative trainings. In general, the coordinator provides more focused and advanced trainings and consultation opportunities than can often be provided by most community organizations.

Grantee	
Institute on Aging	Citywide ADRC Coordinator

Grantee Selections

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

Funding

The funding is 10% Federal Fund and 90% County Fund.

Attachments

Bayview Senior Services

Appendix A: Services to be provided

Appendix B: Program budget

Catholic Charities

Appendix A: Services to be provided

Appendix B: Program budget

Golden Gate Senior Services

Appendix A: Services to be provided

Appendix B: Program budget



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Institute on Aging
Appendix A: Services to be provided
Appendix B: Program budget

Mission Neighborhood Centers
Appendix A: Services to be provided
Appendix B: Program budget

On Lok
Appendix A: Services to be provided
Appendix B: Program budget

Openhouse
Appendix A: Services to be provided
Appendix B: Program budget

Self-Help for the Elderly
Appendix A: Services to be provided
Appendix B: Program budget

Sequoia Living
Appendix A: Services to be provided
Appendix B: Program budget

Toolworks, Inc.
Appendix A: Services to be provided
Appendix B: Program budget

APPENDIX A – SERVICES TO BE PROVIDED
BAYVIEW SENIOR SERVICES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

The location for services will be 1753 Carroll Avenue, San Francisco CA 94124 and 1390-1/2 Turk Street, San Francisco, CA 94115. Hours of Operation: Monday-Friday, 9am-5pm.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.

- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Bayview Senior Services ADRC:

- Will serve the following unduplicated older adults:
600 in FY 20/21
1300 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
100 in FY 20/21
200 in FY 21/22-FY 23/24
- Will provide the following units of information and referral services:
3000 in FY 20/21
6000 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
1500 in FY 20/21
3000 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
600 in FY 20/21
1200 in FY 21/22-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
E:mail address: sara.hofverberg@sfgov.org

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

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Bayview Senior Services					Term 1/1/21 - 6/30/24
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: ADRC					
Budget Reference Page No.(s)					1/1/21 - 6/30/24
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	Total
Expenditures					
Salaries & Benefits	\$61,701	\$124,842	\$124,842	\$124,842	\$436,227
Operating Expenses					
Subtotal	\$61,701	\$124,842	\$124,842	\$124,842	\$436,227
Indirect Percentage (%)	12%	12%	12%	12%	12%
Indirect Cost (Line 16 X Line 15)	\$7,501	\$14,982	\$14,982	\$14,982	\$52,447
Subcontractor/Capital Expenditures					
Total Expenditures	\$69,202	\$139,824	\$139,824	\$139,824	\$488,674
HSA Revenues					
Fund	\$69,202	\$139,824	\$139,824	\$139,824	\$488,674
TOTAL HSA REVENUES	\$69,202	\$139,824	\$139,824	\$139,824	\$488,674
Other Revenues					
Total Revenues					
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					1/6/2021

Bayview Senior Services

Appendix B, Page 3

Program: ADRC

Operating Expense Detail

<u>Expenditure Category</u>	TERM					TOTAL
		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
OTHER						
TOTAL OPERATING EXPENSES						
HSA #3						1/6/2021

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

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

Services will be provided at Catholic Charities OMI Senior Center: at 65 Beverly Street, San Francisco, CA 94132. Hours of operation are from 8:30am-3:30pm, Monday-Friday.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.

- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Catholic Charities ADRC:

- Will serve the following unduplicated older adults:
560 in FY 20/21
1150 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
35 in FY 20/21
85 in FY 21/22
95 in FY 22/23
115 in FY 23/24
- Will provide the following units of information and referral services:
750 in FY 20/21
1500 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
700 in FY 20/21
1300 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
200 in FY 20/21
350 in FY 21/22-FY 23/24

Each grantee will report the previous service objectives on a quarterly basis:

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
 Department of Disability and Aging Services
 PO Box 7988
 San Francisco, CA 94120
 E:mail address: sara.hofverberg@sfgov.org

Patrick Garcia, Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: patrick.garcia@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Catholic Charities					Term 1/1/21 - 6/30/24
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: Aging and Disability Resource Center (ADRC)					
Budget Reference Page No.(s)	1/1/21 - 6/30/24				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	Total
Expenditures					
Salaries & Benefits	\$37,547	\$75,092	\$75,092	\$75,092	\$262,823
Operating Expenses	\$1,728	\$4,422	\$4,422	\$4,422	\$14,994
Subtotal	\$39,275	\$79,514	\$79,514	\$79,514	\$277,817
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$5,891	\$11,927	\$11,927	\$11,927	\$41,672
Subcontractor/Capital Expenditures					
Total Expenditures	\$45,166	\$91,441	\$91,441	\$91,441	\$319,489
HSA Revenues					
Federal	\$4,517	\$9,144	\$9,144	\$9,144	\$31,949
Local	\$40,649	\$82,297	\$82,297	\$82,297	\$287,540
TOTAL HSA REVENUES	\$45,166	\$91,441	\$91,441	\$91,441	\$319,489
Other Revenues					
Total Revenues	\$45,166	\$91,441	\$91,441	\$91,441	\$319,489
Full Time Equivalent (FTE)					
Prepared by: Patty Clement / Rosa Mendez / Delilah Perez			Telephone No.: 415-452-3504 / 415-972-1208		
HSA-CO Review Signature: _____					
HSA #1					6/20/2018

Catholic Charities Program: Aging and Disability Resource Center (ADRC)		Salaries & Benefits Detail								
		Agency Totals		HSA Program		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary	
	Program Director	\$76,899	1.00	10%	0.10	\$3,845	\$7,690	\$7,690	\$7,690	\$26,915
Infrom/Referral Coordinator	\$44,990	1.00	90%	0.90	\$20,246	\$40,491	\$40,491	\$40,491	\$141,719	
Prog Assistant Back-Up	\$39,292	1.00	20%	0.20	\$3,929	\$7,858	\$7,858	\$7,858	\$27,503	
				-						
				-						
				-						
				-						
TOTALS	\$161,181	3.00	120%	1.20	\$28,020	\$56,039	\$56,039	\$56,039	\$196,137	
FRINGE BENEFIT RATE	34%									
EMPLOYEE FRINGE BENEFITS	\$54,802				\$9,527	\$19,053	\$19,053	\$19,053	\$66,686	
TOTAL SALARIES & BENEFITS	\$215,983				\$37,547	\$75,092	\$75,092	\$75,092	\$262,823	
HSA #2									6/20/2018	

Catholic Charities

Appendix B, Page 3

Program: Aging and Disability Resource Center (ADRC)

Operating Expense Detail

<u>Expenditure Category</u>	TERM					TOTAL
		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property			\$500	\$500	\$500	\$1,500
Utilities(Elec, Water, Gas, Phone, Garbage)		\$670	\$1,360	\$1,360	\$1,360	\$4,750
Office Supplies, Postage			\$164	\$164	\$164	\$492
Building Maintenance Supplies and Repair		\$100	\$200	\$200	\$200	\$700
Printing and Reproduction		\$50				\$50
Insurance		\$849	\$1,698	\$1,698	\$1,698	\$5,943
Staff Training			\$100	\$100	\$100	\$300
Staff Travel-(Local & Out of Town)		\$59	\$300	\$300	\$300	\$959
Rental of Equipment						
CONSULTANTS						
OTHER						
Computer Related			\$100	\$100	\$100	\$300
TOTAL OPERATING EXPENSES		\$1,728	\$4,422	\$4,422	\$4,422	\$14,994
HSA #3						6/20/2018

**APPENDIX A – SERVICES TO BE PROVIDED
GOLDEN GATE SENIOR SERVICES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024**

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

Services will be provided at the Golden Gate Senior Services Richmond Senior Center located at 6221 Geary Boulevard, San Francisco, CA 94121. Hours of operation are from 8:30am-4:30pm, Monday to Friday.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.

- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.
- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Golden Gate Senior Services ADRC:

- Will serve the following unduplicated older adults:
750 in FY 20/21
1500 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
70 in FY 20/21
150 in FY 21/22-FY 23/24
- Will provide the following units of information and referral services:
600 in FY 20/21
1200 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
500 in FY 20/21
1000 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
200 in FY 20/21
400 in FY 21/22-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
E:mail address: sara.hofverberg@sfgov.org

Ella Lee, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: ella.lee@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Golden Gate Senior Services					Term 1/1/21 - 6/30/24
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: Aging and Disability Resource Center					
Budget Reference Page No.(s)					1/1/21 - 6/30/24
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	Total
Expenditures					
Salaries & Benefits	\$53,970	\$107,940	\$107,940	\$107,940	\$377,790
Operating Expenses	\$1,030	\$2,060	\$2,060	\$2,060	\$7,210
Subtotal	\$55,000	\$110,000	\$110,000	\$110,000	\$385,000
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$8,250	\$16,500	\$16,500	\$16,500	\$57,750
Subcontractor/Capital Expenditures					
Total Expenditures	\$63,250	\$126,500	\$126,500	\$126,500	\$442,750
HSA Revenues					
Federal	\$6,325	\$12,650	\$12,650	\$12,650	\$44,275
Local	\$56,925	\$113,850	\$113,850	\$113,850	\$398,475
TOTAL HSA REVENUES	\$63,250	\$126,500	\$126,500	\$126,500	\$442,750
Other Revenues					
Total Revenues					
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					6/20/2018

Golden Gate Senior Services
 Program: Aging and Disability Resource Center

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS	DAS	DAS	DAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
I&A Specialist I Russian/English	\$47,840	0.75	100%	0.75	\$17,940	\$35,880	\$35,880	\$35,880	\$125,580
Cantonese/Mandarin/English	\$52,000	1	100%	1.00	\$26,000	\$52,000	\$52,000	\$52,000	\$182,000
RSC Director	\$109,408	0.8	5%	0.04	\$2,188	\$4,376	\$4,376	\$4,376	\$15,316
				-					
				-					
				-					
				-					
TOTALS	\$209,248	2.55	205%	1.79	\$46,128	\$92,256	\$92,256	\$92,256	\$322,896
FRINGE BENEFIT RATE	17%								
EMPLOYEE FRINGE BENEFITS	\$35,572				\$7,842	\$15,684	\$15,684	\$15,684	\$54,894
TOTAL SALARIES & BENEFITS	\$244,820				\$53,970	\$107,940	\$107,940	\$107,940	\$377,790
HSA #2									6/20/2018

Golden Gate Senior Services
 Program: Aging and Disability Resource Center

Operating Expense Detail

<u>Expenditure Category</u>	TERM					TOTAL
		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)		\$630	\$1,260	\$1,260	\$1,260	\$4,410
Office Supplies, Postage		\$400	\$800	\$800	\$800	\$2,800
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
OTHER						
TOTAL OPERATING EXPENSES		\$1,030	\$2,060	\$2,060	\$2,060	\$7,210
HSA #3						6/20/2018

**APPENDIX A–SERVICES TO BE PROVIDED
INSTITUTE ON AGING
CITYWIDE AGING AND DISABILITY RESOURCE CENTER (ADRC) COORDINATOR**

January 1, 2021 to June 30, 2024

I. Purpose of Grant

The Grantee will provide training and administrative consultation to ADRC staff, as well as coordinating and executing an ADRC outreach plan.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet their needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client’s needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more

	activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

The intended recipients of the services provided by the Citywide ADRC Coordinator are DAS funded community ADRC staff working with older adults and adults with disabilities.

IV. Eligibility for ADRC Coordinator Services

DAS funded ADRC staff working with older adults and adults with disabilities.

V. Location and Time of Services

Group consultation, individual consultation, and didactic trainings will be delivered at the Institute on Aging and/or each ADRC. Exact schedule and location will be determined in conjunction with the ADRC staff and their on-site supervisors.

The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff. The specifics of either consultation mode will be worked out with each specific agency. This flexibility allows for the service model to respond to the culture of each organization.

VI. Description of Services

The ADRC is a “no wrong door” model for consumers to access long term care services and supports. It is achieved through a partnership between DAS, the Citywide ADRC Coordinator and the ADRCs throughout San Francisco. The Citywide ADRC Coordinator assists with this by providing: individual and group administrative support, didactic and administrative training, chart and documentation review, and opportunities for professional networking/resource sharing.

The Citywide ADRC Coordinator shall be responsible for arranging for and identifying necessary outreach efforts to promote ADRCs in neighborhoods throughout the City, advertising information and referral services in coordination with ADRC staff.

The Citywide ADRC Coordinator shall monitor the effectiveness of services at each outstation (e.g., conducting timely follow up activities, appropriateness of referrals, adequate service levels), providing feedback to the DAS contract monitor as needed.

Citywide ADRC Coordinator Grantee Responsibilities:

- Monthly group consultation for all ADRC staff. Group meetings provide case consultation, topic specific training, and review of core tasks and standards of information and referral as well as assistance concepts to improve the ADRC staff’s general performance as well as their ability to work with clients (e.g., recognizing case management and other social service needs of clients and the need for follow-up with clients). For group consultation, the Citywide ADRC Coordinator will also bring in outside experts and trainers to expand knowledge of resources, geriatric and disability related topics, and improving skills in assessments, effective follow-up, and managing challenging client issues. An added benefit of the group consultation context is the camaraderie that develops between participants encouraging resource sharing, cross agency referrals, and peer review and guidance.
- Deliver weekly individual and administrative consultation to ADRC staff. Individual consultation sessions emphasize specific ADRC staff performance issues, challenging client issues and offer guidance for maintaining quality information and referral services. In addition, individual consultation provides a forum to address and improve charting and documentation issues.

- Meet with ADRC site supervisors on a quarterly basis to ensure coordination between the Citywide ADRC Coordinator and the day to day ADRC site supervisors in order to make programs more effective and avoid any problems of “dual support.”
- Develop and maintain outreach plan and materials for ADRC staff collaboration. The plan will identify targets for increased utilization of ADRC services in historically underserved neighborhoods. The plan will, at a minimum, develop and identify outreach events in conjunction with other ADRC partners, updating outreach events monthly.
- Collaborate with DAS analyst and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria. This includes attending the quarterly ADRC Advisory Council meeting and the quarterly ADRC supervisors meeting.
- Develop partnerships with other community organizations across the City to ensure a robust network of service provision.
- Arrange for the execution of outreach events, providing outreach through presentations and fairs, and partnering with ADRC staff and/or DAS to staff events.
- Provide training and consultation to the ADRC staff regarding the ADRC service.
- Designate at least one 1.0 FTE as the Citywide ADRC Coordinator and provide back-up staff in case of any absence.
- Ensure that the Citywide ADRC Coordinator has the technology and systems available to meet the needs of training, consulting and coordinating the ADRC staff.

VII. Service Objectives

- Provide staff consultations to all ADRCs on a weekly basis for at least 46 weeks of the fiscal year.
- Host 12 monthly ADRC staff group meetings.
- Ensure that a minimum of 6 ADRC staff group meetings include training or information services around working with people with disabilities and disability services available.
- Ensure that 90% of quarterly individual meetings with the ADRC on-site supervisors of the participating agencies occur.
- Coordinate at least one outreach effort to adults with disabilities with each individual ADRC site.
- Complete a monthly outreach plan calendar.

Grantee will provide a quarterly report on the service objectives.

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created, distributed, collected, and recorded by DAS analyst.

- ADRC staff receive monthly trainings that address their needs. Target: 95%
- ADRC staff receive weekly consultations that address their needs. Target: 95%
- ADRC staff increase knowledge or skills to assist clients with their specific needs around disability. Target: 95%

IX. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- F. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Office of Community Partnerships
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
Email address: sara.hofverberg@sfgov.org

Patrick Garcia, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
E:mail address: patrick.garcia@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.

- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Institute on Aging					Term 1/1/21 - 6/30/24
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: Aging and Disability Resource Center					
Budget Reference Page No.(s)					
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24 Total
Expenditures					
Salaries & Benefits	\$48,599	\$100,114	\$103,116	\$103,116	\$354,945
Operating Expenses	\$4,454	\$14,953	\$11,951	\$11,951	\$43,309
Subtotal	\$53,053	\$115,067	\$115,067	\$115,067	\$398,254
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$7,958	\$17,260	\$17,260	\$17,260	\$59,738
Subcontractor/Capital Expenditures					
Total Expenditures	\$61,011	\$132,327	\$132,327	\$132,327	\$457,992
HSA Revenues					
Federal	\$6,101	\$13,233	\$13,233	\$13,233	\$45,800
Local	\$54,910	\$119,094	\$119,094	\$119,094	\$412,192
TOTAL HSA REVENUES	\$61,011	\$132,327	\$132,327	\$132,327	\$457,992
Other Revenues					
Total Revenues	\$61,011	\$132,327	\$132,327	\$132,327	\$457,992
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					6/20/2018

Institute on Aging		Appendix B, Page 2								
Program: Aging and Disability Resource Center										
Salaries & Benefits Detail										
POSITION TITLE	Agency Totals		HSA Program		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24	
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary	
ADRC Coordinator	\$68,895	1.00	100%	1.00	\$34,448	\$70,963	\$73,091	\$73,091	\$251,593	
Manager of Comm Programs	\$110,775	1.00	8%	0.08	\$4,431	\$9,128	\$9,402	\$9,402	\$32,362	
				-						
				-						
				-						
				-						
TOTALS	\$179,670	2.00	108%	1.08	\$38,879	\$80,091	\$82,493	\$82,493	\$283,956	
FRINGE BENEFIT RATE	25%									
EMPLOYEE FRINGE BENEFITS	\$44,918				\$9,720	\$20,023	\$20,623	\$20,623	\$70,989	
TOTAL SALARIES & BENEFITS	\$224,588				\$48,599	\$100,114	\$103,116	\$103,116	\$354,945	
HSA #2										6/20/2018

Institute on Aging
 Program: Aging and Disability Resource Center

Operating Expense Detail

<u>Expenditure Category</u>	TERM					TOTAL
		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property		\$1,560	\$4,500	\$4,500	\$4,500	\$15,060
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,000	\$2,040	\$2,040	\$2,040	\$7,120
Office Supplies, Postage		\$323	\$646	\$646	\$646	\$2,261
Technology			\$2,500		\$127	\$2,627
Staff Training		\$250	\$500	\$627	\$500	\$1,877
Staff Travel-(Local & Out of Town)		\$344	\$867	\$688	\$688	\$2,587
Telephone			\$1,000	\$1,000	\$1,000	\$3,000
Insurance		\$300	\$600	\$600	\$600	\$2,100
Outreach Support		\$217	\$900	\$450	\$450	\$2,017
License and Fees		\$460	\$1,400	\$1,400	\$1,400	\$4,660
CONSULTANTS						
OTHER						
TOTAL OPERATING EXPENSES		\$4,454	\$14,953	\$11,951	\$11,951	\$43,309
HSA #3						6/20/2018

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

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

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

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.

- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Mission Neighborhood Centers ADRC:

- Will serve the following unduplicated older adults:
600 in FY 20/21
1350 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
60 in FY 20/21
150 in FY 21/22-FY 23/24
- Will provide the following units of information and referral services:
1200 in FY 20/21
1500 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
1100 in FY 20/21
1350 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
175 in FY 20/21
350 in FY 21/22-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
 Department of Disability and Aging Services
 PO Box 7988
 San Francisco, CA 94120
 E:mail address: sara.hofverberg@sfgov.org

Tahir Shaikh, Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: tahir.shaikh@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name	Term				
Agency Name: Mission Neighborhood Centers, Inc.	1/1/20-6/30/24				
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod.		No. of Mod.			
Program: ADRC					
Budget Reference Page No.(s)					Total
Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
Expenditures					
Salaries & Benefits	\$49,719	\$96,317	\$96,317	\$96,317	\$338,670
Operating Expenses	\$955	\$937	\$937	\$937	\$3,766
Subtotal	\$50,674	\$97,254	\$97,254	\$97,254	\$342,436
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$7,601	\$14,589	\$14,589	\$14,589	\$51,368
Subcontractor/Capital Expenditures					
Total Expenditures	\$58,275	\$111,843	\$111,843	\$111,843	\$393,804
HSA Revenues					
General Fund	\$58,275	\$111,843	\$111,843	\$111,843	\$393,804
TOTAL HSA REVENUES	\$58,275	\$111,843	\$111,843	\$111,843	\$393,804
Other Revenues					
Total Revenues	\$58,275	\$111,843	\$111,843	\$111,843	\$393,804
Full Time Equivalent (FTE)	1.37	1.37	1.37	1.37	
Prepared by: Aurora Alvarado		Telephone No.: 415.206.7750			
HSA-CO Review Signature: _____					
HSA #1					6/20/2018

Agency Name: Mission Neighborhood Centers, Inc.
Program: ADRC

Operating Expense Detail

<u>Expenditure Category</u>	<u>TERM</u>	<u>1/1/21-6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>	<u>TOTAL</u> <u>1/1/21-6/30/24</u>
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)		\$428	\$764	\$764	\$764	\$2,720
Office Supplies, Postage		\$300				\$300
Building Maintenance Supplies and Repair		\$127				\$127
Printing and Reproduction						
Insurance		\$100	\$173	\$173	\$173	\$619
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
OTHER						
TOTAL OPERATING EXPENSE		\$955	\$937	\$937	\$937	\$3,766

HSA #3

6/20/2018

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

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

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

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.

- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, On Lok Day Services ADRC:

- Will serve the following unduplicated older adults:
809 in FY 20/21
1618 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
140 in FY 20/21
281 in FY 21/22-FY 23/24
- Will provide the following units of information and referral services:
1296 in FY 20/21
2593 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
1273 in FY 20/21
2546 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
826 in FY 20/21
1652 in FY 21/22-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
 Department of Disability and Aging Services
 PO Box 7988
 San Francisco, CA 94120
 E:mail address: sara.hofverberg@sfgov.org

Patrick Garcia, Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: patrick.garcia@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name	Term				
On-Lok Day Services	1/1/21 - 6/30/24				
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod.	No. of Mod.				
Program: Aging and Disability Resource Center (ADRC)					
Budget Reference Page No.(s)	1/1/21 - 6/30/24				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	Total
Expenditures					
Salaries & Benefits	\$70,327	\$133,606	\$133,646	\$133,646	\$471,225
Operating Expenses	\$6,165	\$3,476	\$3,435	\$3,435	\$16,511
Subtotal	\$76,492	\$137,082	\$137,081	\$137,081	\$487,736
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$11,474	\$20,561	\$20,562	\$20,562	\$73,159
Subcontractor/Capital Expenditures					
Total Expenditures	87,966	\$157,643	\$157,643	\$157,643	560,895
HSA Revenues					
Federal	8,797	\$15,764	\$15,764	\$15,764	56,089
Local	79,169	\$141,879	\$141,879	\$141,879	504,806
TOTAL HSA REVENUES	87,966	157,643	157,643	157,643	560,895
Other Revenues					
Fundraising	\$582	\$19,674	\$36,318	\$36,318	\$92,891
Total Revenues	\$88,548	\$177,317	\$193,961	\$193,961	\$653,786
Full Time Equivalent (FTE)	2.20	2.16	2.21	2.21	
Prepared by: Meko Ma	Telephone No.: (628)208-8546				
HSA-CO Review Signature: _____					
HSA #1					12/21/2020

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

Salaries & Benefits Detail

H.S.A-DAS POSITION TITLE	1/1/21 - 6/30/21					7/1/21 - 6/30/22					7/1/22 - 6/30/23		7/1/23 - 6/30/24		1/1/21 - 6/30/24		
	Agency Totals		HSA Program		DAS	Agency Totals		HSA Program		DAS	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	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
I&A Specialist #1	\$49,733	1.00	100.00%	1.00	\$24,866	\$49,733	1.00	100.00%	1.00	\$49,733	\$49,733	1.00	100.00%	1.00	\$49,733	\$49,733	\$174,065
I&A Specialist #2	\$43,680	1.00	100.00%	1.00	\$21,840	\$43,680	1.00	100.00%	1.00	\$43,680	\$43,680	1.00	100.00%	1.00	\$43,680	\$43,680	\$152,880
I&A Specialist #3	\$43,680					\$43,680	0.13	50.00%	0.06	\$2,730	\$43,680	0.25	63.00%	0.16	\$6,880	\$6,880	\$16,490
Geriatric Support Services Mgr	\$82,368	1.00	20.00%	0.20	\$8,237	\$82,368	1.00	10.00%	0.10	\$8,237	\$82,368	1.00	5.00%	0.05	\$4,118	\$4,118	\$24,710
				-					-					-			
				-					-					-			
				-					-					-			
TOTALS	\$219,461	3.00	220%	2.20	\$54,943	\$219,461	3.13	260%	2.16	\$104,380	\$219,461	3.25	268%	2.21	\$104,411	\$104,411	\$368,145
FRINGE BENEFIT RATE	28%					28%					28%						
EMPLOYEE FRINGE BENEFITS	\$61,449				\$15,384	\$61,449				\$29,226	\$61,449				\$29,235	\$29,235	\$103,080
TOTAL DAS SALARIES & BENEFITS	\$280,910				\$70,327	\$280,910				\$133,606	\$280,910				\$133,646	\$133,646	\$471,225
Non-DAS	Agency Totals		HSA Program		DAS	Agency Totals		HSA Program		DAS	Agency Totals		HSA Program		DAS	DAS	TOTAL
I&A Specialist #1	\$49,733	1.00		-		\$49,733	1.00		-		49,732.80	1.00		-			
I&A Specialist #2	\$43,680	1.00		-		\$43,680	1.00		-		43,680.00	1.00		-			
I&A Specialist #3	\$43,680			-		\$43,680	0.13	50.00%	0.06	\$1,365	43,680.00	0.25	37.00%	0.09	\$4,040	\$4,040	\$9,445
Geriatric Support Services Mgr	\$82,368	1.00		-		\$82,368	1.00	15.00%	0.15	\$6,178	82,368.00	1.00	20.0%	0.20	\$16,474	\$16,474	\$39,126
				-					-					-			
				-					-					-			
				-					-					-			
TOTALS	\$219,461	3.00		-		\$219,461	3.13	65%	0.21	\$7,543	\$219,461	3.25	57%	0.29	\$20,514	\$20,514	\$48,571
FRINGE BENEFIT RATE	28%					28%					28%						
EMPLOYEE FRINGE BENEFITS	\$61,449					\$61,449				\$2,112	\$61,449				\$5,744	\$5,744	\$13,600
TOTAL Non-DAS SALARIES & BENEFITS	\$280,910					\$280,910				\$9,655	\$280,910				\$26,258	\$26,258	\$62,171
TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$280,910				\$70,327	\$280,910				\$143,261	\$280,910				\$159,904	\$159,904	\$533,396
HSA #2																	12/21/2020

On-Lok Day Services						Appendix B, Page 3
Program: Aging and Disability Resource Center (ADRC)						
Operating Expense Detail						
H.S.A-DAS						TOTAL
<u>Expenditure Category</u>	TERM	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,091	\$722	\$714	\$714	\$3,241
Office Supplies, Postage		\$290	\$192	\$190	\$190	\$862
Building Maintenance Supplies and Repair		\$918				\$918
Printing and Reproduction		\$750	\$497	\$491	\$491	\$2,229
Insurance		\$523	\$347	\$343	\$343	\$1,556
Staff Training		\$750	\$497	\$491	\$491	\$2,229
Staff Travel-(Local & Out of Town)		\$750	\$497	\$491	\$491	\$2,229
Rental of Equipment		\$137	\$90	\$89	\$89	\$405
CONSULTANTS						
OTHER						
Payroll Processing		\$129	\$86	\$85	\$85	\$385
Data Plan		\$827	\$548	\$541	\$541	\$2,457
TOTAL DAAS OPERATING EXPENSE		\$6,165	\$3,476	\$3,435	\$3,435	\$16,511
Non-DAS						TOTAL
<u>Expenditure Category</u>	TERM	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)		-	1,460	1,468	1,468	\$4,396
Office Supplies, Postage		-	388	390	390	\$1,168
Building Maintenance Supplies and Repair		582	3,000	3,000	3,000	\$9,582
Printing and Reproduction		-	1,003	1,009	1,009	\$3,021
Insurance		-	700	704	704	\$2,107
Staff Training		-	1,003	1,009	1,009	\$3,021
Staff Travel-(Local & Out of Town)		-	1,003	1,009	1,009	\$3,021
Rental of Equipment		-	183	184	184	\$552
CONSULTANTS						
OTHER						
Payroll Processing		-	173	174	174	\$521
Data Plan		-	1,106	1,113	1,113	\$3,332
TOTAL Non-DAS OPERATING EXPENSES		\$582	\$10,019	\$10,060	\$10,060	\$30,720
TOTAL DAAS & Non-DAAS OPERATING EXPEN		\$6,747	\$13,495	\$13,495	\$13,495	\$47,231
HSA #3						12/21/2020

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

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

Services will be provided at Openhouse: at 65 Laguna St, San Francisco, CA 94102. Hours of operation are from 9:30am-5:30pm, Monday-Friday.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client’s needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.

- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Openhouse ADRC:

- Will serve the following unduplicated older adults:
540 in FY 20/21
1115 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
65 in FY 20/21
130 in FY 21/22-FY 23/24
- Will provide the following units of information and referral services:
792 in FY 20/21
1585 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
675 in FY 20/21
1350 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
205 in FY 20/21
410 in FY 21/22-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
 Department of Disability and Aging Services
 PO Box 7988
 San Francisco, CA 94120
 E:mail address: sara.hofverberg@sfgov.org

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

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name	Term				
Openhouse	1/1/21-6/30/24				
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. No. of Mod.					
Program: ADRC					
Budget Reference Page No.(s)					TOTAL
Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
Expenditures					
Salaries & Benefits	\$44,759	\$90,523	\$90,523	\$90,523	\$316,328
Operating Expenses					
Subtotal	\$44,759	\$90,523	\$90,523	\$90,523	\$316,328
Indirect Percentage (%)	15%	15%	15%	15%	
Indirect Cost (Line 16 X Line 15)	\$6,714	\$13,578	\$13,578	\$13,578	\$47,449
Subcontractor/Capital Expenditures					
Total Expenditures	\$51,472	\$104,102	\$104,102	\$104,102	\$363,778
HSA Revenues					
General Fund	\$51,472	\$104,102	\$104,102	\$104,102	\$363,778
TOTAL HSA REVENUES	\$51,472	\$104,102	\$104,102	\$104,102	\$363,778
Other Revenues					
Total Revenues	\$51,472	\$104,102	\$104,102	\$104,102	\$363,778
Full Time Equivalent (FTE)					
Prepared by: Matthew Cimino Telephone No.: 415-530-2783					
HSA-CO Review Signature: _____					
HSA #1					1/6/2021

Openhouse
Program: ADRC
 (Same as Line 9 on HSA #1)

Operating Expense Detail

<u>Expenditure Category</u>	TERM					TOTAL
		<u>1/1/21-6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>1/1/21-6/30/24</u>	<u>7/1/23-6/30/24</u>	<u>1/1/21-6/30/24</u>
Rental of Property						\$ -
Utilities(Elec, Water, Gas, Phone, Garbage)						\$ -
Office Supplies, Postage						\$ -
Building Maintenance Supplies and Repair						\$ -
Printing and Reproduction						\$ -
Insurance						\$ -
Staff Training						\$ -
Staff Travel-(Local & Out of Town)						\$ -
Rental of Equipment						\$ -
CONSULTANTS						
						\$ -
						\$ -
OTHER						
						\$ -
						\$ -
TOTAL OPERATING EXPENSE		\$ -	\$ -	\$ -	\$ -	\$ -

HSA #3

1/6/2021

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

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

The services for Self-Help for the Elderly will be provided at 4 locations: 601 Jackson Street, San Francisco, CA 94133 and 777 Stockton Street, San Francisco CA 94108, 131 Lenox Way, San Francisco, CA 94127 and 2601 40th Avenue, San Francisco, CA 94116. Hours of operation at 601 Jackson Street and 777 Stockton Street are from 9:00am-5pm, Monday to Friday. Hours of operation at 131 Lenox Way and 2601 40th Avenue are from 9:00am-2:00pm, Monday to Friday.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.

- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.
- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

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

- Will serve the following unduplicated older adults:
2400 in FY 20/21
4800 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
200 in FY 20/21
480 in FY 21/22-FY 23/24
- Will provide the following units of information and referral services:
2840 in FY 20/21
5680 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
5000 in FY 20/21
10,000 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
850 in FY 20/21
1700 in FY 21/22-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
 Department of Disability and Aging Services
 PO Box 7988
 San Francisco, CA 94120
 E:mail address: sara.hofverberg@sfgov.org

Tahir Shaikh, Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: tahir.shaikh@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name					Term
SELF-HELP FOR THE ELDERLY					1/1/21 - 6/30/24
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: ADRC					
Budget Reference Page No.(s)					Total
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21-6/30/24
Expenditures					
Salaries & Benefits	\$153,140	\$306,280	\$306,280	\$306,280	\$1,071,980
Operating Expenses	\$6,525	\$14,713	\$14,713	\$14,713	\$50,664
Subtotal	\$159,665	\$320,993	\$320,993	\$320,993	\$1,122,644
Indirect Percentage (%)	14%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$22,778	\$48,149	\$48,149	\$48,149	\$167,225
Subcontractor/Capital Expenditures					
Total Expenditures	\$182,443	\$369,142	\$369,142	\$369,142	\$1,289,869
HSA Revenues					
Fund					
	\$182,443	\$369,142	\$369,142	\$369,142	\$1,289,869
TOTAL HSA REVENUES	\$182,443	\$369,142	\$369,142	\$369,142	\$1,289,869
Other Revenues					
Total Revenues					
Full Time Equivalent (FTE)					
Prepared by:	Leny Nair			Telephone No.:	415-677-7682
HSA-CO Review Signature:	_____				
HSA #1					6/20/2018

SELF-HELP FOR THE ELDERLY

Program: ADRC

Appendix B, Page 3

12/21/2020

Operating Expense Detail

Expenditure Category	TERM					TOTAL
		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property		\$4,052	\$8,104	\$8,104	\$8,104	\$28,364
Utilities(Elec, Water, Gas, Phone, Garbage)		\$773	\$1,546	\$1,546	\$1,546	\$5,411
Office Supplies, Postage			\$600	\$600	\$600	\$1,800
Building Maintenance Supplies and Repair			\$563	\$563	\$563	\$1,689
Printing and Reproduction						
Insurance		\$800	\$1,600	\$1,600	\$1,600	\$5,600
Staff Training						
Staff Travel-(Local & Out of Town)			\$250	\$250	\$250	\$750
Rental of Equipment			\$250	\$250	\$250	\$750
CONSULTANTS						
OTHER						
Communications(cell phone allowances)		\$900	\$1,800	\$1,800	\$1,800	\$6,300
TOTAL OPERATING EXPENSES		\$6,525	\$14,713	\$14,713	\$14,713	\$50,664
HSA #3						6/20/2018

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

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

Services will be provided at both San Francisco Senior Center locations: 481 O'Farrell Street, San Francisco, CA 94102 (Downtown Center), and 890 Beach Street, San Francisco, CA 94109 (Aquatic Park Center). Downtown Center hours of operation are Monday-Thursday 9am-4pm and Friday 9am-3:30pm. Aquatic Park Center hours are Monday-Friday 9am-4pm.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.

- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.
- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Sequoia Living ADRC:

- Will serve the following unduplicated older adults:
892 in FY 20/21
1785 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
90 in FY 20/21
180 in FY 21/22-FY 23/24
- Will provide the following units of information and referral services:
1050 in FY 20/21
2100 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
1050 in FY 20/21
2100 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
525 in FY 20/21
1050 in FY 21/22-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A.** Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B.** Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
E:mail address: sara.hofverberg@sfgov.org

Ella Lee, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: ella.lee@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Sequoia Living					Term 1/1/21 - 6/30/24
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: Aging and Disability Resource Center					
Budget Reference Page No.(s)					
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24 Total
Expenditures					
Salaries & Benefits	\$68,893	\$137,785	\$137,785	\$137,785	\$482,248
Operating Expenses	\$450	\$900	\$900	\$900	\$3,150
Subtotal	\$69,343	\$138,685	\$138,685	\$138,685	\$485,398
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$10,401	\$20,803	\$20,803	\$20,803	\$72,810
Subcontractor/Capital Expenditures					
Total Expenditures	\$79,744	\$159,488	\$159,488	\$159,488	\$558,208
HSA Revenues					
Federal	\$7,974	\$15,949	\$15,949	\$15,949	\$55,821
Local	\$71,770	\$143,539	\$143,539	\$143,539	\$502,387
TOTAL HSA REVENUES	\$79,744	\$159,488	\$159,488	\$159,488	\$558,208
Other Revenues					
Total Revenues					
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					6/20/2018

Sequoia Living

Program: Aging and Disability Resource Center

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS	DAS	DAS	DAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Service Coordinator-DT	\$48,797	1	100%	1.00	\$24,399	\$48,797	\$48,797	\$48,797	\$170,790
Service Coordinator-AP	\$49,046	1	100%	1.00	\$24,523	\$49,046	\$49,046	\$49,046	\$171,661
Director	\$84,406	0.05	100%	0.05	\$2,110	\$4,220	\$4,220	\$4,220	\$14,770
				-					
				-					
				-					
				-					
TOTALS	\$182,249	2.05	300%	2.05	\$51,032	\$102,063	\$102,063	\$102,063	\$357,221
FRINGE BENEFIT RATE	35%								
EMPLOYEE FRINGE BENEFITS	\$63,787				\$17,861	\$35,722	\$35,722	\$35,722	\$125,027
TOTAL SALARIES & BENEFITS	\$246,036				\$68,893	\$137,785	\$137,785	\$137,785	\$482,248
HSA #2									6/20/2018

Sequoia Living

Appendix B, Page 3

Program: Aging and Disability Resource Center

Operating Expense Detail

<u>Expenditure Category</u>	TERM					TOTAL
		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage		\$150	\$700	\$700	\$700	\$2,250
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training		\$300	\$200	\$200	\$200	\$900
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
OTHER						
TOTAL OPERATING EXPENSES		\$450	\$900	\$900	\$900	\$3,150
HSA #3						6/20/2018

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

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

Services will take place at Toolworks, Inc., 25 Kearny Street, #400, San Francisco, CA, 94108. Hours of operation are from 8:30am-4:30pm, Monday to Friday.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.

- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Toolworks ADRC:

- Will serve the following unduplicated older adults:
180 in FY 20/21
360 in FY 21/22-FY 23/24
- Will serve the following unduplicated adults with disabilities:
420 in FY 20/21
840 in FY 21/22-FY 23/24
- Will provide the following units of information and referral services:
775 in FY 20/21
1550 in FY 21/22-FY 23/24
- Will provide the following service units of assistance:
808 in FY 20/21
1616 in FY 21/22-FY 23/24
- Will provide the following units of follow-up services:
228 in FY 20/21
457 in FY 21/22-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
 Department of Disability and Aging Services
 PO Box 7988
 San Francisco, CA 94120
 E:mail address: sara.hofverberg@sfgov.org

Patrick Garcia, Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: patrick.garcia@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Toolworks						Term 1/1/21 - 6/30/24
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
If modification, Effective Date of Mod. _____ No. of Mod. _____						
Program: Aging and Disability Resource Center						
Budget Reference Page No.(s)						1/1/21 - 6/30/24
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	Total	
Expenditures						
Salaries & Benefits	\$30,058	\$63,797	\$63,797	\$63,797	\$221,449	
Operating Expenses						
Subtotal	\$30,058	\$63,797	\$63,797	\$63,797	\$221,449	
Indirect Percentage (%)						
Indirect Cost (Line 16 X Line 15)						
Subcontractor/Capital Expenditures						
Total Expenditures	\$30,058	\$63,797	\$63,797	\$63,797	\$221,449	
HSA Revenues						
Federal	\$3,006	\$6,380	\$6,380	\$6,380	\$22,146	
Local	\$27,052	\$57,417	\$57,417	\$57,417	\$199,303	
TOTAL HSA REVENUES	\$30,058	\$63,797	\$63,797	\$63,797	\$221,449	
Other Revenues						
Total Revenues	\$30,058	\$63,797	\$63,797	\$63,797	\$221,449	
Full Time Equivalent (FTE)						
Prepared by: Sarah Burgett				Telephone No.: 415-733-0990		
HSA-CO Review Signature: _____						
HSA #1						6/20/2018

Toolworks

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Program: Aging and Disability Resource Center

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24	
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS	DAS	DAS	DAS	TOTAL	
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	
I&R Specialist	\$45,095	1.00	100%	1.00	\$21,327	\$45,095	\$45,095	\$45,095	\$156,612	
Director, Community Living	\$76,300	1.00	10%	0.10	\$3,514	\$7,630	\$7,630	\$7,630	\$26,404	
				-						
				-						
				-						
				-						
TOTALS	\$121,395	2.00	110%	1.10	\$24,841	\$52,725	\$52,725	\$52,725	\$183,016	
FRINGE BENEFIT RATE	21%									
EMPLOYEE FRINGE BENEFITS	\$25,493				\$5,217	\$11,072	\$11,072	\$11,072	\$38,433	
TOTAL SALARIES & BENEFITS	\$146,888				\$30,058	\$63,797	\$63,797	\$63,797	\$221,449	
HSA #2										6/20/2018

Toolworks

Appendix B, Page 3

Program: Aging and Disability Resource Center

Operating Expense Detail

<u>Expenditure Category</u>	TERM					TOTAL
		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
OTHER						
TOTAL OPERATING EXPENSES						
HSA #3						6/20/2018