



**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

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

FROM: JILL NIELSEN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DATE: WEDNESDAY, JULY 7 2021

SUBJECT: NEW GRANT: **INSTITUTE ON AGING** (NON-PROFIT) FOR THE PROVISION OF THE SAN FRANCISCO ELDER ABUSE FORENSIC CENTER

DS
et

GRANT TERM: 07/01/2021 – 06/30/2025

GRANT AMOUNT:	New	Contingency	Total
	\$628,164	\$62,816	\$690,980

ANNUAL AMOUNT:	FY 21/22	FY 22/23	FY 23/24	FY 24/25
	\$184,541	\$154,541	\$144,541	\$144,541

Funding Source:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$578,164		\$50,000	\$62,816	\$690,980

PERCENTAGE	92%	8%	100%
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London Breed
Mayor

Trent Rhorer
Executive Director

The Department of Disability and Aging Services (DAS) requests authorization to enter into a new grant agreement with Institute on Aging for the provision of the San Francisco Elder Abuse Forensic Center during the period of July 1, 2021 through June 30, 2025, in an amount of \$628,164 plus a 10% contingency for a total amount not to exceed \$690,980. The purpose of this grant is to bring together agency representatives and experts in a variety of fields that are involved in the identification, intervention, and remedy of abuse to adults with disabilities and older adults.

This grant includes a one-time federal funding of \$50,000 in the first 15 months for an Elder Death Review Team.



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Background

The San Francisco Elder Abuse Forensic Center will be responsible for convening and coordinating a multi-disciplinary team, comprised of San Francisco Police Department, the District Attorney's Office, Adult Protective Services, the Office of the Public Guardian, and paid consultants such as a Geriatrician, a Geriatric Psychiatrist or other professionals deemed integral to the San Francisco Elder Abuse Forensic Center case discussions. The multi-disciplinary team, otherwise known as the San Francisco Elder Abuse Forensic Center, meets on a regular basis to discuss cases of abuse to adults with disabilities and older adults with the goal of sharing expertise and resources to provide further direction, which might involve prosecution, to the cases being discussed.

Services to be Provided

Grantee will perform the following services:

- A. Direct and coordinate all aspects of the San Francisco Elder Abuse Forensic Center, including reviewing referrals, facilitating twice monthly meetings, and facilitating communication between partners. In addition, Grantee shall develop a statistical database and capture variables such as incidence and types of abuse, breakdown of referrals by age, ethnicity, and neighborhoods in San Francisco. Grantee shall also collect statistics on the number of reports investigated by San Francisco Police Department and the outcome of the investigation, including prosecutions by the District Attorney's Office.
- B. Facilitate quarterly meetings of the San Francisco Elder Abuse Forensic Center Steering Committee, comprised of representatives of San Francisco Elder Abuse Forensic Center partners.
- C. Facilitate Multidisciplinary Team (MDT) Meetings at least once per quarter. MDTs are case conferences that can include both San Francisco Elder Abuse Forensic Center partners and members of the provider community. Each MDT meeting shall also include an educational component. Grantee will coordinate with Adult Protective Services to identify education component.
- D. Update annually a Memorandum of Understanding with each participating partner of the San Francisco Elder Abuse Forensic Center.



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E. Initiate meetings to discuss an Elder Death Review Team (EDRT), and when operational, items A, B and D above will also apply to the EDRT.

Selection

Grantee was selected through RFP #903 issued in April 2021.

Funding

This grant will be funded through Federal, County, and Dignity Funds.

Attachments

Appendix A – Services to be Provided

Appendix B – Budget (Elder Abuse Forensic Center)

Appendix B-1 – Budget (Elder Death Review Team)

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

ELDER ABUSE FORENSIC CENTER

July 1, 2021 – June 30, 2025

I. Purpose of Grant

The SF Elder Abuse Forensic Center (SF-EAFC) is responsible for convening and coordinating a multi-disciplinary team, comprised of SFPD, the District Attorney's Office, Adult Protective Services, the Office of the Public Guardian, and paid consultants such as a Geriatrician, a Geriatric Psychiatrist or other professionals deemed integral to the Forensic Center case discussions. The multi-disciplinary team, otherwise known as the SF Elder Abuse Forensic Center, meets on a regular basis to discuss cases of dependent adult and elder abuse with the goal of sharing expertise and resources to provide further direction, which might involve prosecution, to the cases being discussed.

II. Definitions

APS	Adult Protective Services. Government agency that receives and investigates reports of suspected elder/dependent adult abuse.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Dependent Adult	An Adult with a Disability who is 18-64 years, who cannot care for themselves and depend on others for protection or to meet their most basic needs.
SF-EAFC – or Forensic Center	San Francisco Elder Abuse Forensic Center
EDRT	Elder Death Review Team
Elder (an Older Adult)	An older adult who is 65 years or older.

Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, 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 older individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Institute on Aging
HSA	Human Services Agency of City and County of San Francisco
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Mandated Reporter	In California, any individual that has assumed full or intermittent care of an elder or a dependent adult through the course of his or her work.
OCM	Office of Contract Management, Human Services Agency
SOGI	Sexual Orientation and Gender Identity, a result of Ordinance No. 159-16 which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)

III. Target Populations

The target population of presentations and discussions at Forensic Center meetings are adults with a disability who are considered dependent adults between the ages of 18 to 64, and older adults aged 65 and older that have been abused, neglected, exploited, or that are demonstrating signs of self-neglect. The majority of Forensic Center cases that are reviewed are also clients to APS. However, the Forensic Center is a resource that can be accessed by other HSA programs, or by community-based service providers in San Francisco that work with the target population.

The target population of presentations and discussions at Elder Death Review Team (EDRT) meetings are deceased adults with a disability who were considered dependent adults between the ages of 18 to 64, and older adults aged 65 and older that possibly died due to suspected or confirmed abuse, neglect, self-neglect, or exploitation. The majority of EDRT cases that are reviewed were also clients to APS. However, the EDRT is a resource that can be accessed by other HSA programs, City Public Agencies, and CBOs in San Francisco that worked with the target population.

IV. Description of Services

Grantee shall provide the following services during the term of this contract:

- a. Grantee shall direct and coordinate all aspects of the Forensic Center, including reviewing referrals, facilitating twice monthly meetings, and facilitating communication between partners. In addition, the contractor shall develop a statistical database to capture such variables as incidence and types of abuse, breakdown of referrals by age, ethnicity, and neighborhoods in San Francisco. Grantee shall also collect statistics on the number of reports investigated by SFPD and the outcome of the investigation, including prosecutions by the DA's Office. APS social workers will present on challenging cases that require collaboration between multiple programs or agencies in order to address the protection issues of the client. The Forensic center meetings will act as a forum for deliberation and planning interventions for the cases to improve outcomes for the clients
- b. Grantee shall facilitate quarterly meetings of the Forensic Center and EDRT Steering Committee, comprised of representatives of Forensic Center and EDRT partners.
- c. Grantee shall facilitate Multidisciplinary Team (MDT) Meetings at least once per quarter. MDTs are case conferences that can include both Forensic Center partners and members of the provider community. Each MDT meeting shall also include an educational component. Grantee will coordinate with the APS Program Director to identify the education component.
- d. Grantee shall update annually a Memorandum of Understanding with each participating partner of the Forensic Center, and the EDRT.
- e. Upon reinstatement of the EDRT, in collaboration with the District Attorney's Office, the Medical Examiner's Office, and other Forensic Center partners, the grantee shall coordinate the EDRT and its monthly meetings. This coordination shall include setting and coordinating meetings, taking minutes, retaining signed confidentiality forms, and keeping statistics about the deceased elders and dependent adults that are reviewed at the EDRT. The Grantee shall assist with the preparation of any EDRT reports that are compiled by the team.

V. Location and Time of Services

The meetings referenced above will take place in the office of Adult Protective Services at 1650 Mission Street. Nevertheless, with approval from the grantor, the meetings may be held online using applications approved by the grantor, or a hybrid of in-person and online options. The grantee facilitator may be given office space for up to 3 employees with desks, computer, and phone. The facilitator may work at the APS program office if desired with their own equipment. During the COVID-19 pandemic and based on

circumstances associated with it or other major disasters, the meetings may be held online using applications approved by the grantor, or a hybrid of in-person and online options.

VI. Grantee Responsibilities

Grantee shall provide the following services during the term of this grant:

- a.) Develop work plans to carry out service and outcome objectives;
- b.) Adhere to HIPAA guidelines regarding confidentiality and safely maintaining and storing all program materials;
- c.) Comply with monitoring and reporting requirements;
- d.) Hold quarterly Steering Committee meetings to report on program progress;

VII. Service Objectives

Facilitation:

- Facilitate twice monthly Elder Abuse Forensic Center Meetings.(Minimum 20 Meetings)
- Coordinate and facilitate at least 4 MDT Meetings annually (4 Meetings)
- Facilitate quarterly Elder Abuse Forensic Center Steering Committee Meetings. (4 Meetings)
- Upon resuming EDRT meetings, the grantee will schedule EDRT meetings, prepare agendas, and take minutes. (12 meetings)
- Provide at least one annual update/orientation re the Elder Abuse Forensic Center to APS staff to help ensure understanding of the Forensic Center's role in facilitating multi-disciplinary discussions of APS cases. (1 Presentation)
- Annually, carry out a satisfaction survey with Forensic Center and EDRT partners and APS staff to evaluate effectiveness of the Contractor's coordination efforts. (1 Survey)
- Annually, carry out a satisfaction survey with aging and disability community based partners, to evaluate the effectiveness of the quarterly MDT meetings and determine programmatic areas that need to be changed or updated. (1 Survey)

VIII. Outcome Objectives

- The Forensic Center shall demonstrate value to the APS program through the reduction in risk factors for cases presented in the Forensic Center forum. 80% of cases presented to the Forensic Center shall have a net reduction of risk factors score from the pre-test score at case opening, and post-test score at closure of the case.
- In surveys conducted by the Grantee, a minimum of 80% of respondents to the Forensic Center and EDRT Partners survey will indicate that grantee's coordination efforts were appropriate, relevant, and adequate.

- In surveys conducted by the Grantee, a minimum of 80% of MDT meeting attendee respondents will indicate that the MDT meeting educational components were satisfactorily informative.
- In surveys conducted by the Grantee, 80% of APS staff attendees at the annual Elder Abuse Forensic Center update will indicate that grantee’s presentation was informative and did a satisfactory job of explaining the purpose of the Forensic Center and the procedure for presenting Forensic Center cases.
- In surveys conducted by the Grantee of FC and EDRT Steering Committee members, 80% of members who regularly attend the meetings will indicate that the Forensic Center and EDRT are useful to their staff and that the Forensic Center and EDRT steering committee meetings are useful for providing input and working through issues that arise in the Forensic Center and EDRT forums.

IX. Reporting Requirements

- A. Grantee will provide a quarterly report of activities, referencing the tasks as described in Section IV– Description of Services, VI– Service Objectives, and VII- Outcome Objectives. Reports are due 15 days after the close of the reporting period and must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system.
- B. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section IV– Description of Services, VI- Service Objectives, and VII - Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. This report is due 15 days after the completion of the program year and must be entered into CARBON.
- C. Grantee will provide various reports during the term of the grant agreement.
 - 1. Grantee shall input all required data into the Contracts Administration, Reporting, and Billing Online (CARBON) database and CA Getcare on a quarterly basis. Grantee is exempt from entering consumer data into CA Getcare but is required to input monthly unit of service reports into the Summary Service Recording Tool by the 15th working day of the month for the preceding month.
 - 2. Grantee shall submit to DAS/APS a quarterly report on the Elder Abuse Forensic Center Quarterly Activity Report (Report form to be provided)

Quarterly Reporting Period: Specific reporting periods and due dates are as follows:

<u>Quarter</u>	<u>Report Periods</u>	<u>Due Date from Grantee</u>
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1 st Quarter	July 1 – September 30	October 15
2 nd Quarter	October 1 – December 31	January 15
3 rd Quarter	January 1 – March 31	April 15
4 th Quarter	April 1 – June 30	July 15

3. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report shall be entered into CARBON and is due to HSA no later than July 31.
4. Provider shall report total Elder Abuse Forensic Center federal and local funds separately in their audited financial statements (in tables or in text). These expenditures, based upon invoiced payments, will be reported by HSA to the provider in time for inclusion. Provider shall keep records of time studies or other basis of documenting actual time spent and charged to the program.
5. Grantee will provide an annual consumer satisfaction survey report to DAS/APS by March 15 each grant year.
6. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
7. Grantee shall develop and deliver ad hoc reports as requested by HSA.
8. Apart from reports requested to be sent via e-mail to the Program Director and/or Contract Manager, all other reports should be sent to the following addresses:

Akiles Ceron, Program Director
DAS, APS
1650 Mission Street, 5/F
San Francisco, CA 94103

Patrick Garcia, Administrative Analyst
Human Services Agency
PO Box 7988
San Francisco, CA 94120

X. Monitoring Activities

- A. Program Monitoring: Program monitoring includes a review of quarterly reports and quarterly meetings between the Grantee and the APS Program Director to evaluate the status of the Grantee's progress towards meeting the service and outcome objectives. Additionally, the Grantee has been observed by the APS Program Director facilitating Forensic Center and EDRT meetings and carrying out coordination activities to facilitate an improved elder abuse response by Forensic Center and EDRT partners. Future program monitoring activities will include an annual survey to Forensic Center and EDRT partners and APS staff that utilize the Forensic Center and EDRT to determine areas for quality improvement.

- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring includes a 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 7/1/21 - 6/30/25				
(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: Elder Abuse Forensic Center					
Budget Reference Page No.(s)					Total
Program Term	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/21 - 6/30/25
Expenditures					
Salaries & Benefits	\$106,064	\$106,064	\$106,064	\$106,064	\$424,256
Operating Expenses	\$19,624	\$19,624	\$19,624	\$19,624	\$78,496
Subtotal	\$125,688	\$125,688	\$125,688	\$125,688	\$502,752
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$18,853	\$18,853	\$18,853	\$18,853	\$75,412
Subcontractor/Capital Expenditures					
Total Expenditures	\$144,541	\$144,541	\$144,541	\$144,541	\$578,164
HSA Revenues					
General Funds	\$144,541	\$144,541	\$144,541	\$144,541	\$578,164
TOTAL HSA REVENUES	\$144,541	\$144,541	\$144,541	\$144,541	\$578,164
Other Revenues					
Total Revenues	\$144,541	\$144,541	\$144,541	\$144,541	\$578,164
Full Time Equivalent (FTE)					
Prepared by: Matthew Mouille					Telephone No.:
HSA-CO Review Signature: _____					
HSA #1					

Institute On Aging
 Program: Elder Abuse Forensic Center

Operating Expense Detail

Expenditure Category	TERM					TOTAL
		7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/21 - 6/30/25
Rental of Property		4,850	4,850	4,850	4,850	\$19,400
Office/Program Supplies, Postage		1,700	1,700	1,700	1,700	\$6,800
Insurance		590	590	590	590	\$2,360
Training		1,075	1,075	1,075	1,075	\$4,300
Technology		3,000	3,000	3,000	3,000	\$12,000
Staff Travel (Local & Out of Town)		500	500	500	500	\$2,000
Licenses and Fees		2,409	2,409	2,409	2,409	\$9,636
CONSULTANTS						
Medical Consultant		5500	5500	5500	5500	\$22,000
OTHER						
TOTAL OPERATING EXPENSES		\$19,624	\$19,624	\$19,624	\$19,624	\$78,496
HSA #3						

	A	B	C	D
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Term	
6	Institute on Aging		7/1/21-9/30/22	
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Elder Death Review Team			
10	Budget Reference Page No.(s)			7/1/21-9/30/22
11	Program Term		7/1/21-6/30/22	7/1/22-9/30/22
12	Expenditures			
13	Salaries & Benefits	\$20,220	\$5,054	\$25,274
14	Operating Expenses	\$14,563	\$3,641	\$18,204
15	Subtotal	\$34,783	\$8,696	\$43,478
16	Indirect Percentage (%)	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$5,217	\$1,304	\$6,522
18	Subcontractor/Capital Expenditures			
19	Total Expenditures	\$40,000	\$10,000	\$50,000
20	HSA Revenues			
21	Federal Funds (CFDA 93.747)	\$40,000	\$10,000	\$50,000
22				
23				
24				
25				
26				
27				
28	TOTAL HSA REVENUES	\$40,000	\$10,000	\$50,000
29	Other Revenues			
30				
31				
32				
33				
34				
35	Total Revenues	\$40,000	\$10,000	\$50,000
36	Full Time Equivalent (FTE)			
38	Prepared by:		Telephone No.:	
39	HSA-CO Review Signature: _____			
40	HSA #1			6/1/2021

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	Institute on Aging							
4	Program: Elder Death Review Team							
5								
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11						7/1/21-6/30/22	7/1/22-9/30/22	7/1/21-9/30/22
		Agency Totals		HSA Program		DAS	DAS	TOTAL
		Annual Full TimeSalary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	Director, Elder Abuse Prevention	\$90,611	1.00	5%	0.05	\$4,531	\$1,133	\$5,664
14	Associate Director, Elder Abuse Pr	\$73,542	1.00	5%	0.05	\$3,677	\$919	\$4,596
15	Sr. Program Coordinator (incl. admi	\$65,214	1.00	5%	0.05	\$3,261	\$815	\$4,076
16	Manager Community Programgs	\$107,625	1.00	5%	0.05	\$5,381	\$1,345	\$6,726
29								
30	TOTALS		4.00	20%	0.20	\$16,850	\$4,212	\$21,062
31								
32	FRINGE BENEFIT RATE	20%						
33	EMPLOYEE FRINGE BENEFITS	\$0				\$3,370	\$842	\$4,212
34								
35								
36	TOTAL SALARIES & BENEFITS	\$0				\$20,220	\$5,054	\$25,274
37	HSA #2							6/1/2021

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3	Institute on Aging									
4	Program: Elder Death Review Team									
5										
6										
7	Operating Expense Detail									
8										
9										
10										
11										
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/21-6/30/22</u>		<u>7/1/22-9/30/22</u>		<u>TOTAL</u>	<u>7/1/21-9/30/22</u>
13	Rental of Property				\$2,200		\$455		\$	2,655
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$765		\$214		\$	979
15	Office Supplies, Postage				\$211		\$49		\$	260
16	Insurance				\$500		\$66		\$	566
17	Staff Travel-(Local & Out of Town)				\$500		\$143		\$	643
18	Outreach Support				\$269		\$100		\$	369
19	Staff Training				\$500		\$200		\$	700
20	Tech and License Fees				\$600		\$160		\$	760
21										
22	CONSULTANTS									
23	Consulting				\$ 9,018		\$ 2,256		\$	11,273
24										
25										
26	OTHER									
27										
28										
29										
30	TOTAL OPERATING EXPENSE				\$ 14,563		\$ 3,641		\$	18,204
31										
32	HSA #3									6/1/2021