



**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

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DATE: NOVEMBER 3, 2021

SUBJECT: GRANT MODIFICATIONS: MULTIPLE GRANTEES
(NON-PROFIT) FOR PROVISION OF AGING AND
DISABILITIES RESOURCE CENTERS (ADRC)

GRANT TERM(S): 01/01/21 – 06/30/24

GRANT AMOUNT:	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
	\$2,264,172	\$313,525	\$2,577,697	\$257,770	\$2,835,467

ANNUAL MOD AMOUNT:	<u>FY 21/22</u>	<u>FY 22/23</u>	<u>FY 23/24</u>
	\$240,393	\$36,566	\$36,566

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
	\$2,242,596		\$335,101	\$257,770	\$2,835,467

FUNDING: PERCENTAGE:

	87%	13%	100%
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DS
EE

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing contract with multiple providers for the period of July 1, 2021 to June 30, 2024, in the additional amount of \$313,525 plus a 10% contingency for a revised total amount not to exceed \$2,835,467. The purpose of this modification is to increase Chinese and Spanish language staffing to meet demand.

Agency	Current Grant Amount	FY21-22 Mod Amount	FY22-23 Mod Amount	FY23-24 Mod Amount	FY21-24 Total Mod Amount	Revised FY21-24 Amount	10% Contingency	FY21-24 Total Not to Exceed
Mission Neighborhood Centers	\$396,790	\$96,434	\$6,434	\$6,434	\$109,302	\$506,092	\$50,609	\$556,701
On Lok Day Services	\$565,301	\$48,588	\$8,588	\$8,588	\$65,764	\$631,065	\$63,107	\$694,172
Self-Help for the Elderly	\$1,302,081	\$95,371	\$21,544	\$21,544	\$138,459	\$1,440,540	\$144,054	\$1,584,594
TOTAL	\$2,264,172	\$240,393	\$36,566	\$36,566	\$313,525	\$2,577,697	\$257,770	\$2,835,467

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 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

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.

Modification

The following modifications include:

Mission Neighborhood Centers

The additional funding supports an increase in Spanish language capacity staffing and adds an additional full time employee with Chinese language capacity. These staffing additions will have a significant impact on supporting the language needs of District 9.

On Lok Day Services

The additional funding supports an increase in Chinese language capacity staffing from a half time to full time employee. This District 8 ADRC has seen an increase in the number of Chinese speaking residents seeking services, and this increase will help to address that need.

Self-Help for the Elderly

The additional funding supports hiring an additional full time Chinese speaking staff person. Self-Help for the Elderly currently operates four ADRC sites across Districts 3, 4, and 7. This additional staff person will support staffing needs and Chinese language capacity across all their sites and districts.

Selection

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

Funding

Funding for this grant is provided through a combination of Federal and County General Funds.

ATTACHMENTS

Mission Neighborhood Centers

Appendix A-1, Scope of Services

Appendix B-1, Budget

On Lok Day Services

Appendix A-1, Scope of Services

Appendix B-1, Budget

Self-Help for the Elderly

Appendix A-1, Scope of Services

Appendix B-1, Budget

**APPENDIX A-1 – 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
1750 in FY 21/22
2250 in FY 22/23-FY23/24
- Will serve the following unduplicated adults with disabilities:
60 in FY 20/21
200 in FY 21/22
250 in FY 22/23-FY23/24
- Will provide the following units of information and referral services:
1200 in FY 20/21
2100 in FY 21/22
2800 in FY 22/23-FY23/24
- Will provide the following service units of assistance:
1100 in FY 20/21
1900 in FY 21/22
2500 in FY 22/23-FY23/24
- Will provide the following units of follow-up services:
175 in FY 20/21
425 in FY 21/22
500 in FY 22/23-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

Tara Alvarez, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: tara.alvarez@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.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Appendix B-1, Page 1											
2												
3	HUMAN SERVICES AGENCY BUDGET SUMMARY											
4	BY PROGRAM											
5	Name						Term					
6	Agency Name: Mission Neighborhood Centers, Inc.						1/1/21-6/30/24					
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>											
8	If modification, Effective Date of Mod. 11.01.2021 No. of Mod. 1											
9	Program: ADRC											
10	Budget Reference Page No.(s)											
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	REVISION 7/1/21 - 6/30/22	TOTAL 7/1/21 - 6/30/22	7/1/22-6/30/23	REVISION 7/1/22-6/30/23	TOTAL 7/1/22-6/30/23	7/1/23-6/30/24	REVISION 7/1/23-6/30/24	TOTAL 7/1/23-6/30/24	1/1/21-6/30/24 Total
12	Expenditures											
13	Salaries & Benefits	\$43,274	\$96,317	\$80,063	\$176,380	\$96,317	\$5,456	\$101,773	\$96,317	\$5,456	\$101,773	\$423,199
14	Operating Expenses	\$9,997	\$937	\$3,793	\$4,730	\$937	\$139	\$1,076	\$937	\$139	\$1,076	\$16,879
15	Subtotal	\$53,271	\$97,254	\$83,856	\$181,110	\$97,254	\$5,595	\$102,849	\$97,254	\$5,595	\$102,849	\$440,078
16	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$7,991	\$14,589	\$12,578	\$27,166	\$14,589	\$839	\$15,427	\$14,589	\$839	\$15,427	\$66,012
18	Subcontractor/Capital Expenditures											
19	Total Expenditures	\$61,262	\$111,843	\$96,434	\$208,276	\$111,843	\$6,434	\$118,276	\$111,843	\$6,434	\$118,276	\$506,092
20	HSA Revenues											
21	General Fund	\$61,262	\$111,843		\$111,843	\$111,843		\$111,843	\$111,843		\$111,843	\$396,790
22	20/21 CODB			\$2,988	\$2,988		\$2,988	\$2,988		\$2,988	\$2,988	\$8,965
23	21/22 CODB			\$3,445	\$3,445		\$3,445	\$3,445		\$3,445	\$3,445	\$10,336
24	Addback			\$90,000	\$90,000							\$90,000
25												
26												
27												
28												
29	TOTAL HSA REVENUES	\$61,262	\$111,843	\$96,434	\$208,276	\$111,843	\$6,434	\$118,276	\$111,843	\$6,434	\$118,276	\$506,092
30	Other Revenues											
31												
32												
33												
34												
35												
36	Total Revenues	\$61,262	\$111,843	\$96,434	\$208,276	\$111,843	\$6,434	\$118,276	\$111,843	\$6,434	\$118,276	\$506,092
37	Full Time Equivalent (FTE)	2.53	2.53		2.53	2.53		1.42	2.53		1.42	
39	Prepared by: Aurora Alvarado Telephone No.: 415.206.7750											
40	HSA-CO Review Signature: _____											
41	HSA #1 6/20/2018											

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	
1																											
2																											
3	Agency Name: Mission Neighborhood Centers, Inc.																										
4	Program: ADRC																										
5																											
6																											
7	Operating Expense Detail																										
8																											
9																											
10																											
11																											
12	Expenditure Category	TERM	1/1/21-6/30/21	7/1/21-6/30/22	REVISION	TOTAL	7/1/22-6/30/23	REVISION	TOTAL	7/1/23-6/30/24	REVISION	TOTAL	1/1/21-6/30/24	TOTAL													
13	Rental of Property																										
14	Utilities(Elec, Water, Gas, Phone, Garbage)		\$726	\$764		\$764	\$764	\$26	\$790	\$764	\$26	\$790	\$	3,070													
15	Office Supplies, Postage		\$2,692		\$240	\$240							\$	2,932													
16	Building Maintenance Supplies and Repair		\$2,557		\$300	\$300		\$113	\$113		\$113	\$113	\$	3,083													
17	Printing and Reproduction																										
18	Insurance		\$176	\$173	\$57	\$230	\$173		\$173	\$173		\$173	\$	752													
19	Staff Training																										
20	Staff Transportation				\$800	\$800							\$	800													
21	Tech/Wifi Equipment				\$1,800	\$1,800							\$	1,800													
22																											
23	CONSULTANTS																										
24																											
25																											
26																											
27	OTHER																										
28	Covid-19 Emergency Response		\$1,469										\$	1,469													
29	Food Supplies		\$557		\$180	\$180							\$	737													
30	Janitorial Supplies		\$1,820		\$416	\$416							\$	2,236													
31																											
32	TOTAL OPERATING EXPENSE		\$ 9,997	\$ 937	\$ 3,793	\$ 4,730	\$ 937	\$ 139	\$ 1,076	\$ 937	\$ 139	\$ 1,076	\$	16,879													
33																											
34	HSA #3													6/20/2018													

	A	B	C	D	E	F
1						Appendix B, Page 4
2						
3		Agency Name: Mission Neighborhood Centers, Inc.				
4		Program: ADRC				
5						
6						
7						
8		Subcontractor/Capital Expenditures				
9						
10		SUBCONTRACTORS	1/1/21-6/30/21	7/1/21-6/30/22	7/1/23-6/30/24	1/1/21-6/30/24
11		Subcontractor 1				
12		Subcontractor 2				
13						
14						
15						
16		TOTAL SUBCONTRACTOR COST	\$0	\$0	\$0	\$0
17						
18						
19		EQUIPMENT	TERM	1/1/21-6/30/21	7/1/21-6/30/22	7/1/23-6/30/24
20	Units	ITEM/DESCRIPTION				
21		Equipment A				
22						
23						
24						
25		TOTAL EQUIPMENT COST	\$0	\$0	\$0	\$0
26						
27		R E M O D E L I N G	1/1/21-6/30/21	7/1/21-6/30/22	7/1/23-6/30/24	1/1/21-6/30/24
28		Description:				
29		Remodel A				
30						
31						
32		TOTAL REMODELING COST	\$0	\$0	\$0	\$0
33						
34		TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE	\$0	\$0	\$0	\$0
35						
36		HSA #4				6/20/2018

**APPENDIX A-1 – 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.
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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
 - 1780 in FY 21/22
 - 1940 in FY 22/23 and FY 23/24
- Will serve the following unduplicated adults with disabilities:
 - 140 in FY 20/21
 - 335 in FY 21/22
 - 308 in FY 22/23 and FY 23/24
- Will provide the following units of information and referral services:
 - 1296 in FY 20/21
 - 2850 in FY 21/22-FY 23/24
 - 3110 in FY 22/23 and FY 23/24
- Will provide the following service units of assistance:
 - 1273 in FY 20/21
 - 2800 in FY 21/22-FY 23/24
 - 3055 in FY 22/23 and FY 23/24
- Will provide the following units of follow-up services:
 - 826 in FY 20/21
 - 1815 in FY 21/22-FY23/24
 - 1980 in FY 22/23 and 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 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 type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>											
If modification, Effective Date of Mod. 7/1/21 No. of Mod. 1											
Program: Aging and Disability Resource Center											
Budget Reference Page No.(s)			(Modification)			(Modification)			(Modification)		Total
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/21 - 6/30/22	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Expenditures											
Salaries & Benefits	\$69,190	\$133,980	\$42,250	\$176,230	\$133,646	\$7,468	\$141,114	\$133,646	\$7,468	\$141,114	\$527,648
Operating Expenses	\$10,759	\$3,476		\$3,476	\$3,435		\$3,435	\$3,435		\$3,435	\$21,105
Subtotal	\$79,949	\$137,456	\$42,250	\$179,706	\$137,081	\$7,468	\$144,549	\$137,081	\$7,468	\$144,549	\$548,753
Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$11,993	\$20,617	\$6,338	\$26,955	\$20,562	\$1,120	\$21,682	\$20,562	\$1,120	\$21,682	\$82,312
Subcontractor/Capital Expenditures											
Total Expenditures	\$91,942	\$158,073	\$48,588	\$206,661	\$157,643	\$8,588	\$166,231	\$157,643	\$8,588	\$166,231	\$631,065
HSA Revenues											
Federal	\$8,797	\$15,764		\$15,764	\$15,764		\$15,764	\$15,764		\$15,764	\$56,089
Local	\$79,169	\$141,879		\$141,879	\$141,879		\$141,879	\$141,879		\$141,879	\$504,806
CODB	\$3,746		\$8,588	\$8,588		\$8,588	\$8,588		\$8,588	\$8,588	\$29,510
MCO	\$230	\$430		\$430							\$660
Language Staffing (FY 21/22) (OTO)			\$40,000	\$40,000							\$40,000
TOTAL HSA REVENUES	\$91,942	\$158,073	\$48,588	\$206,661	\$157,643	\$8,588	\$166,231	\$157,643	\$8,588	\$166,231	\$631,065
Other Revenues											
Fundraising		\$36,097	(\$10,264)	\$25,833	\$36,318	(\$5,171)	\$31,147	\$36,318	(\$5,171)	\$31,147	\$88,126
Total Revenues	\$91,942	\$194,170	\$38,324	\$232,494	\$193,961	\$3,417	\$197,378	\$193,961	\$3,417	\$197,378	\$719,191
Full Time Equivalent (FTE)	2.19	2.17	0.75	2.92	2.21	0.13	2.34	2.21	0.13	2.34	
Prepared by:	Meko Ma										(628)208-8546
HSA-CO Review Signature:	_____										
HSA #1											

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

H.S.A.-DAS	Salaries & Benefits Detail																				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								
	Agency Totals		HSA Program		DAS	Agency Totals		HSA Program		DAS	Agency Totals		HSA Program		DAS	Agency Totals		HSA Program		DAS				
POSITION TITLE	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	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary		
I&A Specialist #1	\$49,223	0.85	100%	0.85	\$20,920	\$49,733	1.00	100%	1.00	\$49,733		\$49,733	\$49,733	1.00	100%	1.00	\$49,733		\$49,733	\$49,733		\$49,733	\$170,119	
I&A Specialist #2	\$43,680	1.00	100%	1.00	\$21,840	\$43,680	1.00	100%	1.00	\$43,680		\$43,680	\$43,680	1.00	100%	1.00	\$43,680		\$43,680	\$43,680		\$43,680	\$152,880	
I&A Specialist #3	\$43,680	0.14	100%	0.14	\$3,058	\$43,680	0.82	100%	0.82	\$3,022	\$33,008	\$36,030	\$43,680	0.29	100%	0.29	\$6,880	\$5,834	\$12,714	\$6,880		\$5,834	\$12,714	\$64,516
Geriatric Support Services Mgr	\$82,368	1.00	20%	0.20	\$8,237	\$82,368	1.00	10%	0.10	\$8,237		\$8,237	\$82,368	1.00	5%	0.05	\$4,118		\$4,118	\$4,118		\$4,118	\$24,710	
TOTALS	\$218,951	2.99	320%	2.19	\$54,055	\$219,461	3.82	310%	2.92	\$104,672	\$33,008	\$137,680	\$219,461	3.29	305%	2.34	\$104,411	\$5,834	\$110,245	\$104,411	\$5,834	\$110,245	\$412,225	
FRINGE BENEFIT RATE	28%					28%				28%			28%				28%			28%				
EMPLOYEE FRINGE BENEFITS	\$61,306				\$15,135	\$61,449				\$29,308	\$9,242	\$38,550	\$61,449				\$29,235	\$1,634	\$30,869	\$29,235	\$1,634	\$30,869	\$115,423	
TOTAL DAS SALARIES & BENEFITS	\$280,257				\$69,190	\$280,910				\$133,980	\$42,250	\$176,230	\$280,910				\$133,646	\$7,468	\$141,114	\$133,646	\$7,468	\$141,114	\$527,648	
Non-DAS																								
I&A Specialist #1	\$49,223	0.85	-	-	\$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	0.14	-	-	\$43,680	0.82	-	-	-	\$7,862	(\$7,862)		43,680.00	0.29	-	-	\$4,040			\$4,040		(\$4,040)	\$15,942	
Geriatric Support Services Mgr	\$82,368	1.00	-	-	\$82,368	1.00	15%	0.15	\$12,355			\$12,355	82,368.00	1.00	20%	0.20	\$16,474	(\$4,040)	\$16,474	\$16,474		(\$4,040)	\$16,474	\$45,303
TOTALS	\$218,951	2.99	-	-	\$219,461	3.82	15%	0.15	\$20,217	(\$7,862)	\$12,355	\$219,461	3.29	20%	0.20	\$20,514	(\$4,040)	\$16,474	\$20,514	(\$4,040)	\$16,474	(\$4,040)	\$16,474	\$61,245
FRINGE BENEFIT RATE	28%					28%				28%			28%				28%			28%				
EMPLOYEE FRINGE BENEFITS	\$61,306				\$61,449				\$5,661	(\$2,202)	\$3,459	\$61,449				\$5,744	(\$1,131)	\$4,613	\$5,744	(\$1,131)	\$4,613	(\$1,131)	\$4,613	\$17,149
TOTAL Non-DAS SALARIES & BENEFITS	\$280,257				\$280,910				\$25,878	(\$10,064)	\$15,814	\$280,910				\$26,258	(\$5,171)	\$21,087	\$26,258	(\$5,171)	\$21,087	(\$5,171)	\$21,087	\$78,394
TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$280,257				\$69,190	\$280,910				\$159,858	\$32,186	\$192,044	\$280,910				\$159,904	\$2,297	\$162,201	\$159,904	\$2,297	\$162,201	\$548,856	

Operating Expense Detail											
H.S.A-DAAS	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		
Expenditure Category	(Modification)	TOTAL	(Modification)	TOTAL	(Modification)	TOTAL	(Modification)	TOTAL	Total		
On-Lok Day Services											
Program: Aging and Disability Resource Center											
Rental of Property											
Utilities(Elec, Water, Gas, Phone, Garbage)	\$ 1,091	\$ 722	\$ 722	714	\$ 714	714	\$ 714	\$ 3,241			
Office Supplies, Postage	\$ 2,584	\$ 192	\$ 192	190	\$ 190	190	\$ 190	\$ 3,156			
Building Maintenance Supplies and Repair	\$ 1,818	\$ -	\$ -	-	\$ -	-	\$ -	\$ 1,818			
Printing and Reproduction	\$ 750	\$ 497	\$ 497	491	\$ 491	491	\$ 491	\$ 2,229			
Insurance	\$ 523	\$ 347	\$ 347	343	\$ 343	343	\$ 343	\$ 1,556			
Staff Training	\$ 100	\$ 497	\$ 497	491	\$ 491	491	\$ 491	\$ 1,579			
Staff Travel-(Local & Out of Town)	\$ 150	\$ 497	\$ 497	491	\$ 491	491	\$ 491	\$ 1,629			
Rental of Equipment	\$ 437	\$ 90	\$ 90	89	\$ 89	89	\$ 89	\$ 705			
CONSULTANTS								\$ -			
								\$ -			
								\$ -			
								\$ -			
								\$ -			
OTHER											
Payroll Processing	\$ 179	\$ 86	86	85	85	85	85	\$ 435			
Data Plan	\$ 827	\$ 548	548	541	541	541	541	\$ 2,457			
Recruiting Fee	\$ 2,300							\$ 2,300			
								\$ -			
								\$ -			
TOTAL DAAS OPERATING EXPENSE	\$10,759	\$3,476	\$3,476	\$3,435	\$3,435	\$3,435	\$3,435	\$21,105			
Non-DAAS											
Expenditure Category	1/1/21 - 6/30/21	7/1/21 - 6/30/22	(Modification) 7/1/21 - 6/30/22	TOTAL 7/1/21 - 6/30/22	7/1/22 - 6/30/23	(Modification) 7/1/22 - 6/30/23	TOTAL 7/1/22 - 6/30/23	7/1/23 - 6/30/24	(Modification) 7/1/23 - 6/30/24	TOTAL 7/1/23 - 6/30/24	TOTAL 1/1/21 - 6/30/24
Rental of Property										\$ -	
Utilities(Elec, Water, Gas, Phone, Garbage)		\$ 1,460		\$ 1,460	1,468		\$ 1,468	1,468	\$ 1,468	\$ 4,396	
Office Supplies, Postage		\$ 388		\$ 388	390		\$ 390	390	\$ 390	\$ 1,168	
Building Maintenance Supplies and Repair		\$ 3,000		\$ 3,000	3,000		\$ 3,000	3,000	\$ 3,000	\$ 9,000	
Printing and Reproduction		\$ 1,003		\$ 1,003	1,009		\$ 1,009	1,009	\$ 1,009	\$ 3,021	
Insurance		\$ 700		\$ 700	704		\$ 704	704	\$ 704	\$ 2,107	
Staff Training		\$ 1,003		\$ 1,003	1,009		\$ 1,009	1,009	\$ 1,009	\$ 3,021	
Staff Travel-(Local & Out of Town)		\$ 1,003		\$ 1,003	1,009		\$ 1,009	1,009	\$ 1,009	\$ 3,021	
Rental of Equipment		\$ 183		\$ 183	184		\$ 184	184	\$ 184	\$ 552	
CONSULTANTS										\$ -	
										\$ -	
										\$ -	
										\$ -	
										\$ -	
OTHER											
Payroll Processing		\$ 173		173	174		174	174	174	\$ 521	
Data Plan		\$ 1,106		1,106	1,113		1,113	1,113	1,113	\$ 3,332	
										\$ -	
										\$ -	
										\$ -	
TOTAL Non-DAAS OPERATING EXPENSES		\$10,019		\$10,019	\$10,060		\$10,060	\$10,060	\$10,060	\$30,138	
TOTAL DAAS & Non-DAAS OPERATING EXPENSE	\$10,759	\$13,495		\$13,495	\$13,495		\$13,495	\$13,495	\$13,495	\$51,243	
HSA #3											

**APPENDIX A-1 – SERVICES TO BE PROVIDED
SELF-HELP FOR THE ELDERLY
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: November 3, 2021**

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
 - 5160 in FY 21/22
 - 5520 in FY 22/23 and FY 23/24
- Will serve the following unduplicated adults with disabilities:
 - 200 in FY 20/21
 - 515 in FY 21/22
 - 550 in FY 22/23 and FY 23/24
- Will provide the following units of information and referral services:
 - 2840 in FY 20/21
 - 6100 in FY 21/22
 - 65309n FY 22/23 and FY 23/24
- Will provide the following service units of assistance:
 - 5000 in FY 20/21
 - 10,750 in FY 21/22
 - 11500 in FY 22/23 and FY 23/24
- Will provide the following units of follow-up services:
 - 850 in FY 20/21
 - 1825 in FY 21/22
 - 1955 in FY 22/23 and 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.

- 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

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

IX. Monitoring Activities

- 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.

	A	E	F	G	H	I	J	K	L	M	N	O
1												Appendix B-1, Page 1
2												9/22/2021
3	HUMAN SERVICES AGENCY BUDGET SUMMARY											
4	BY PROGRAM											
5	Name									Term		
6	SELF-HELP FOR THE ELDERLY									1/1/21 - 6/30/24		
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>											
8	If modification, Effective Date of Mod.											
9	Program: ADRC											
10	Budget Reference Page No.(s)	Revised BUDGET	Original Budget	Modification	Total	Original Budget	Modification	Total	Original Budget	Modification	Total	Total
11	Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/21 - 6/30/22	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21-6/30/24
12	Expenditures											
13	Salaries & Benefits	\$140,020	\$306,280	\$83,232	\$389,512	\$306,280	\$18,734	\$325,014	\$306,280	\$18,734	\$325,014	\$1,179,560
14	Operating Expenses	\$18,864	\$14,713	(\$301)	\$14,412	\$14,713		\$14,713	\$14,713		\$14,713	\$62,702
15	Subtotal	\$158,884	\$320,993	\$82,931	\$403,924	\$320,993	\$18,734	\$339,727	\$320,993	\$18,734	\$339,727	\$1,242,262
16	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$23,859	\$48,149	\$12,440	\$60,589	\$48,149	\$2,810	\$50,959	\$48,149	\$2,810	\$50,959	\$186,366
18	Subcontractor/Capital Expenditures	\$11,912	\$0		\$0	\$0		\$0	\$0		\$0	\$11,912
19	Total Expenditures	\$194,655	\$369,142	\$95,371	\$464,513	\$369,142	\$21,544	\$390,686	\$369,142	\$21,544	\$390,686	\$1,440,540
20	HSA Revenues											
21												
22	General Fund (87%)	\$169,349	\$321,154		\$321,154	\$321,154		\$321,154	\$321,154		\$321,154	\$1,132,811
23	Federal Fund (13%)	\$25,306	\$47,988		\$47,988	\$47,988		\$47,988	\$47,988		\$47,988	\$169,270
24	MCO			\$3,827	\$3,827							\$3,827
25	CODB			\$21,544	\$21,544		\$21,544	\$21,544		\$21,544	\$21,544	\$64,632
26	OTO			\$70,000	\$70,000							\$70,000
27												
28	TOTAL HSA REVENUES	\$194,655	\$369,142	\$95,371	\$464,513	\$369,142	\$21,544	\$390,686	\$369,142	\$21,544	\$390,686	\$1,440,540
29	Other Revenues											
30												
31												
32												
33												
34												
35												
36												
37	Total Revenues	\$194,655	\$369,142	\$95,371	\$464,513	\$369,142	\$21,544	\$390,686	\$369,142	\$21,544	\$390,686	\$1,440,540
38	Full Time Equivalent (FTE)											
40	Prepared by:										Telephone No.:	415-677-7682
41	HSA-CO Review Signature:											
42	HSA #1											

	A	B	C	D	E	I	J	K	L	M	N	O	P	Q	R	S						
1	SELF-HELP FOR THE ELDERLY															Appendix B-1, Page 2						
2	Program: ADRC															9/22/2021						
3																						
4																						
5	Salaries & Benefits Detail																					
6																						
7																						
8		1/1/21 - 6/30/21				7/1/21 - 6/30/22				7/1/22 - 6/30/23			7/1/22 - 6/30/23		7/1/23 - 6/30/24		7/1/23 - 6/30/24		7/1/23 - 6/30/24		1/1/21 - 6/30/24	
		Agency Totals		HSA Program		REVISED SALARIES BUDGET	Budgeted Salary	Modification	Total	DAAS			DAAS			TOTAL						
9	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE					Budgeted Salary	Modification	Total	Budgeted Salary	Modification	Total		Budgeted Salary	Modification	Total	Budgeted Salary		
10	I & A Specialist-Jackson Street	\$47,320	1.00	100.00	1.00	\$22,810	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$164,770						
11	I & A Specialist-Jackson Street	\$47,320	1.00	100.00	1.00	\$17,620	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$159,580						
12	I & A Specialist-Geen Mun	\$47,320	1.00	100.00	1.00	\$22,810	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$164,770						
13	I & A Specialist-South Sunset	\$47,320	1.00	100.00	1.00	\$16,620	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$158,580						
14	I & A Specialist-West Portal	\$47,320	1.00	100.00	1.00	\$14,620	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$45,240	\$2,080	\$47,320	\$156,580						
15	Director of Social Services	\$94,000	1.00	100.00	0.11	\$10,200	\$9,400		\$9,400	\$9,400	(\$3,800)	\$5,600	\$9,400	(\$3,800)	\$5,600	\$30,800						
16	I & A Specialist-Geen Mun	\$47,320	1.00	100.00	1.00			\$47,320	\$47,320			\$0			\$0	\$47,320						
17	Asst Director-Social Services	\$78,000	1.00	100.00	0.10			\$7,800	\$7,800		\$7,800	\$7,800		\$7,800	\$7,800	\$23,400						
18																						
19																						
20																						
21																						
22																						
23																						
24																						
25																						
26																						
27	TOTALS	\$455,920	8.00	80000%	6.21	\$104,680	\$235,600	\$65,520	\$301,120	\$235,600	\$14,400	\$250,000	\$235,600	\$14,400	\$250,000	\$905,800						
28																						
29	FRINGE BENEFIT RATE	29%																				
30	EMPLOYEE FRINGE BENEFIT	\$132,217				\$35,340	\$70,680	\$17,712	\$88,392	\$70,680	\$4,334	\$75,014	\$70,680	\$4,334	\$75,014	\$273,760						
31																						
32																						
33	TOTAL SALARIES & BENEFIT	\$588,137				\$140,020	\$306,280	\$83,232	\$389,512	\$306,280	\$18,734	\$325,014	\$306,280	\$18,734	\$325,014	\$1,179,560						
34	HSA #2															6/20/2018						

	A	B	H	I	J	K	L	M	N	O	
1	SELF-HELP FOR THE ELDERLY									Appendix B-1, Page 3	
2	Program: ADRC									9/22/2021	
3											
4											
5	Operating Expense Detail										
6											
7			REVISED BUDGET	REVISED BUDGET					TOTAL		
8	<u>Expenditure Category</u>	TERM	1/1/21 - 6/30/21	7/1/21 - 6/30/22	Modification	Total	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24		
9	Rental of Property		\$4,052	\$8,104	(\$601)	\$7,503	\$8,104	\$8,104	\$27,763		
10	Phone, Garbage)		\$773	\$1,546		\$1,546	\$1,546	\$1,546	\$5,411		
11	Office Supplies, Postage		\$2,500	\$600		\$600	\$600	\$600	\$4,300		
12	Supplies and Repair		\$3,000	\$563		\$563	\$563	\$563	\$4,689		
13	Printing and Reproduction		\$0						\$0		
14	Insurance		\$1,300	\$1,600		\$1,600	\$1,600	\$1,600	\$6,100		
15	Staff Training		\$0						\$0		
16	Staff Travel-(Local & Out of Town)		\$2,500	\$250		\$250	\$250	\$250	\$3,250		
17	Rental of Equipment		\$339	\$250		\$250	\$250	\$250	\$1,089		
18	CONSULTANTS										
19											
20											
21											
22											
23											
24											
25	OTHER										
26	Communications(cell phone allowances)		\$4,400	\$1,800	\$300	\$2,100	\$1,800	\$1,800	\$10,100		
27											
28											
29											
30											
31											
32	TOTAL OPERATING EXPENSES		\$18,864	\$14,713	(\$301)	\$14,412	\$14,713	\$14,713	\$62,702		
33											
34	HSA #3									6/20/2018	

	A	B	C	D	E	F	G
1	SELF-HELP FOR THE ELDERLY						Appendix B-1, Page 4
2	Program: ADRC						10/20/2020
3							
4							
5	Subcontractor/Capital Expenditures						
6							
7	SUBCONTRACTORS		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
8	Subcontractor 1						
9	Subcontractor 2						
10							
11							
12							
13	TOTAL SUBCONTRACTOR COST						
14							
15							
16	EQUIPMENT		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
17	Units	ITEM/DESCRIPTION					
18	2	Laser Printer	\$1,000				\$1,000
19	2	Portable Printer	\$800				\$800
20	2	Cisco Switch for data & phone	\$4,608				\$4,608
21	1	Cisco Backbone switch	\$977				\$977
22	1	Veeam Backup Replication	\$4,527				\$4,527
23	TOTAL EQUIPMENT COST		\$11,912				\$11,912
24							
25	REMODELING		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
26	Description:						
27	Remodel A						
28							
29							
30							
31							
32	TOTAL REMODELING COST						
33							
34	TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE		\$11,912				\$11,912
35							
36	HSA #4						6/20/2018

Benefits	Rate	\$235,600
FICA	7.65%	\$18,023.40
Workers Comp	0.004	\$942.40
Unemployment Ins	0.006	\$1,413.60
Retirement 403 (B)	3%	\$7,068.00
Health Insurance	3301.43	39617.16
Dental Insurance	311.973	3743.676
		\$70,808.24
		30.05%