



**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 GRANTS: **ASIAN PACIFIC ISLANDER
LEGAL OUTREACH (NON-PROFIT) AND
INSTITUTE ON AGING (NON-PROFIT) FOR THE
PROVISION OF ELDER AND DEPENDENT ADULT
ABUSE PREVENTION SERVICES**

DS
EE

GRANT TERM: 07/01/2021 – 06/30/2025

GRANT AMOUNT: See table on page #3

Funding Source:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$811,604		\$48,452	\$86,006	\$946,062
PERCENTAGE	94%		6%		100%



London Breed
Mayor

Trent Rhorer
Executive Director

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with Asian Pacific Islander Legal Outreach (APILO) and Institute on Aging (IOA) for the provision of Elder and Dependent Adult Abuse Prevention Services during the period of July 1, 2021 through June 30, 2025, in a combined amount of \$860,056 plus a 10% contingency for a total amount not to exceed \$946,062. The purpose of these grants is to improve abuse protections of older adults and adults with disabilities by raising public awareness of abuse issues and mandatory reporting requirements.

Background

The California Welfare and Institutions Code Section 15655.5, requires that Adult Protective Service (APS) programs provide education on abuse, neglect and exploitation to mandated reporters, such as public or private agencies, or persons providing care or services to older adults or adults with disabilities, humane societies and animal control agencies, fire



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departments, offices of environmental health and building code enforcement, and mandated reporters of suspected financial abuse of an older or dependent adult. The education and instructional materials regarding abuse and neglect of an older or dependent adult, and their obligation to report, must include:

- an explanation of abuse and neglect of an older adults or adults with disabilities, information on how to recognize potential abuse and neglect,
- how the county adult protective services agency investigates reports of known or suspected abuse and neglect, and
- instructions on how to report known or suspected incidents of abuse and neglect, including: the appropriate telephone numbers to call and what types of information would assist the county adult protective services agency with its investigation of the report.

One of the service priorities of APS is the need for Elder and Dependent Adult Abuse Prevention programs so older adults and adults with disabilities may live without fear of becoming a victim of abuse or self-neglect.

Elder and Dependent Adult Abuse Prevention programing also contains a Veterans Financial Abuse Outreach and Prevention initiative aimed at educating veterans and their families about financial exploitation and scams targeting Veteran's Administration benefits. Prevention activities will consist of education to veterans and service providers, a public awareness campaign, as well as stakeholder collaboration to improve the identification and response of financial abuse targeted at veterans. San Francisco's County Veteran Services Office (CVSO), a division within DAS, will serve as a key partner on these activities.

Services to be Provided

APILO and IOA will provide leadership and coordination with older adults and adults with disabilities abuse prevention activities, in consultation and coordination with DAS and each other. Activities will include but are not limited to the provision of training to professionals, advocates, volunteers, consumers who either live at home or reside in an institutional setting, their families and friends, and staff of community organizations, on how to identify, prevent and report abuse of older adults and adults with disabilities.

Additionally, APILO will augment the City's efforts to prevent abuse of older adults and adults with disabilities by focusing on education and



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training within the Asian Pacific Islander (API) communities. APILO will convene an API Task Force to coordinate service provision among key providers. APILO has multilingual and culturally diverse staff that are able to competently and effectively conduct education and outreach to the API communities.

Grant Amount

Agency	Annual amount for FY 21/22, FY 22/23, FY 23/24, and FY 24/25	Grant amount	Contingency	Not to Exceed
APILO	\$65,000	\$260,000	\$26,000	\$286,000
IOA	\$150,014	\$600,056	\$60,006	\$660,062
Total	\$215,014	\$860,056	\$86,006	\$946,062

Selection

Grantee was selected through RFP #901 issued in March 2021.

Funding

This grant will be funded through Federal and Dignity Funds

Attachments

Asian Pacific Islander Legal Outreach (APILO)

Appendix A – Services to be Provided

Appendix B – Budget

Institute on Aging (IOA)

Appendix A – Services to be Provided

Appendix B – Budget

Appendix A – Services to be Provided

Asian Pacific Islander Legal Outreach (APILO)

Elder/Dependent Abuse Prevention

July 1, 2021 – June 30, 2025

I. Purpose

The purpose of this grant is to improve the protection of older persons and dependent adults who are in danger of abuse, neglect, or exploitation by raising public awareness of elder/dependent adult abuse issues and mandatory reporting requirements.

II. Definitions

HSA	Human Services Agency of City and County of San Francisco
DAAS	Department of Aging and Adult Services
APS	Otherwise referred to as APS, Government agency that receives and Investigate reports of suspected elder/depend adult abuse.
Grantee	Asian Pacific Islander Legal Outreach
Elder/Senior	Person who is 65 years or older.
Adult with Disability	Person 18 years of age or older living with a disability.
Dependent Adult	Persons who cannot care for themselves and depend on others to meet their most basic needs.

III. Target Population

The end user target population is as follows:

Individuals 65 years of age or older and individuals between 18 and 59 years of age that are living with disabilities. Services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited –English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

The direct target population to be served by this program includes the agencies, professionals, community members, advocates, and volunteers that serve as gatekeepers in the aging and adult services network.

IV. Eligibility for Elder/Dependent Abuse Services

- 1) A resident of San Francisco
- 2) Aged 65 and above, or
- 3) Aged 18 and above with a disability

V. Location and Time of Services

The services will be provided at the APILO offices at 1121 Mission Street, San Francisco, CA, 94103. Time of Services: 9 a.m. – 5 p.m. There are no subcontractors.

VI. Description of Services

The grantee is to provide leadership and coordination in elder/dependent adult abuse prevention in consultation and coordination with the entities stated in the Program Definition above. Activities will include but are not limited to: holding multi-disciplinary team meetings on individual cases or elder abuse related topics, and provision of training to professionals, advocates, volunteers, consumers who either live at home or in an institutional setting, and their families and friends on how to identify, prevent and report elder abuse.

VII. Service Objectives

Grantee must annually meet the following unit of service objectives to the quantities indicated:

- Public Education Sessions – Specify the total number of education sessions for the general public on the identification, prevention, reporting, and treatment of elder abuse, neglect, and exploitation.

Unit: One Session	No. of Sessions <u>8</u>
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- Hours Spent Developing a Coordinated System to Respond to Elder Abuse through the Elder Abuse Task Force– Specify the number of hours spent developing a coordinated system to respond to elder abuse. This would include but is not limited to activities that will assist elder abuse stakeholders to improve their coordinated identification and response to cases of elder and dependent adult abuse.

Unit: One Hour	No. of Hours <u>123</u>
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- Training Sessions for Professionals – Specify the total number of training sessions for professionals, mandated reporters, and law enforcement (service providers, nurses, social workers) on the identification, prevention, reporting obligations, and treatment of elder abuse, neglect, and exploitation.

Unit: 1 hour	No. of hours <u>4</u>
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- Educational Materials Distributed –Specify the type and number of educational materials distributed to the general public, professionals, and caregivers (this may include materials that have been

developed by others) to help in the identification, prevention, reporting, and treatment of elder abuse, neglect, and exploitation specifically targeting API-community members.

Unit: One Material

No. of Materials 1,540

- Number of Individuals reached through the above activities: 1940

VIII. Outcome Objectives

- A. At least 40% of targeted individuals and professionals that work with elders and vulnerable adults will be trained on elder and dependent adult abuse topics, such as identification, prevention, and mandated reporting.
- B. At least 80 % of community partners surveyed will report “good or excellent” understanding of indicators of elder abuse after the grantee’s education/training sessions.
- C. In the consumer satisfaction surveys conducted by the grantee, a minimum of 75% of respondents will state that they will be more likely to report suspected elder/dependent adult abuse as a result of the training.

IX. Reporting and Other Requirements

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

- A. The grantee will enter into the CA Getcare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
 1. Number of individuals trained/served during the month.
 2. Number of hours developing a coordinated system.
- C. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII & VIII – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis:
 - The percentage of participants surveyed that have indicated a “good or excellent” understanding of indicators of elder abuse after the grantee’s education/training sessions
 - The number of outreach events conducted

- D. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- E. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- F. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- H. 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

Akiles Ceron, Program Director
akiles.ceron@sfgov.org
DAS, APS
1650 Mission Street, 5/F
San Francisco, CA 94103

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

X. 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; reporting performance including monthly service unit reports sent to DAS/OOA; 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; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VII and VIII.
- 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 Asian Pacific Islander Leagal Outreach (APILO)					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 Prevention Services					
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	\$50,776	\$50,776	\$50,776	\$50,776	\$203,104
Operating Expenses	\$5,746	\$5,746	\$5,746	\$5,746	\$22,984
Subtotal	\$56,522	\$56,522	\$56,522	\$56,522	\$226,088
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$8,478	\$8,478	\$8,478	\$8,478	\$33,912
Subcontractor/Capital Expenditures					
Total Expenditures	\$65,000	\$65,000	\$65,000	\$65,000	\$260,000
HSA Revenues					
General Funds	\$65,000	\$65,000	\$65,000	\$65,000	\$260,000
TOTAL HSA REVENUES	\$65,000	\$65,000	\$65,000	\$65,000	\$260,000
Other Revenues					
Total Revenues	\$65,000	\$65,000	\$65,000	\$65,000	\$260,000
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
HSA #1					7/7/2021

Asian Pacific Islander Leagal Outreach (APILO)
Program: Elder Abuse Prevention Services

Operating Expense Detail

<u>Expenditure Category</u>	TERM					TOTAL
		<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>7/1/23 - 6/30/24</u>	<u>7/1/24 - 6/30/25</u>	<u>7/1/21 - 6/30/25</u>
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
CONSULTANTS						
OTHER						
Media costs (outreach articles, ads)		\$5,746	\$5,746	\$5,746	\$5,746	\$22,984
TOTAL OPERATING EXPENSES		\$5,746	\$5,746	\$5,746	\$5,746	\$22,984
HSA #3						7/7/2021

APPENDIX A –SERVICES TO BE PROVIDED BY GRANTEE

ELDER/DEPENDENT ADULT ABUSE PREVENTION

July 1, 2021 – June 30, 2025

I. Purpose

The purpose of this grant is to improve the protection of older persons and dependent adults who are at risk of experiencing abuse, neglect, exploitation, or self-neglect by raising public awareness of elder/dependent adult abuse issues and mandatory reporting requirements.

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.
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 (IOA)
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.
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.
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
Service Unit	Training Hour, Training Session, Training Material, and/or Individual Trained as noted in Service Objective categories
SOGI	Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Veteran	Any adult over the age of 18 that self identifies as having a background in the US Armed Forces.

III. Target Population

The target population consists of adults over the age of 65, and adults living with a disability that are between the ages of 18 and 64. Services must target clients that 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
- Frail
- LGBTQ+
- Veterans

The direct, target population to be served through this contract are the agencies, professionals, community members, advocates, volunteers that serve as gatekeepers in the aging and adult services network and more specifically that serve adults with disabilities and elders over the age of 60 that meet the above mentioned economic and social need categories.

Eligibility for Elder/Dependent Abuse Services

- 1) A resident of San Francisco, and
- 2) Aged 65 and above, or
- 3) Aged 18 and above with a disability
- 4) The above, and a veteran for VBPP services.

IV. 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 1 employee 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.

V. Description of Services

Grantee is to provide leadership and coordination in elder/dependent adult abuse prevention in consultation and coordination with the entities stated in the Program Definition above. Activities will include but not limited to provision of training to professionals, law enforcement, advocates, volunteers, consumers who either live at home or reside in an institutional setting, their families and friends, staff of community organizations, on how to identify, prevent and report elder abuse. In collaboration with DAS, grantee will coordinate outreach, awareness, and prevention activities in recognition of World Elder Awareness Day on an annual basis in June.

The Veterans Financial Abuse Outreach and Prevention Program is an initiative within the Elder Abuse Prevention contract aimed at educating veterans and their families about financial exploitation and scams targeting Veteran's Administration benefits. Prevention activities will consist of education to veterans and service providers, a public awareness campaign, as well as stakeholder collaboration to improve the identification and response of financial abuse targeted at veterans. San Francisco's Veteran Services Office, a division within DAS, will serve as a key partner on these activities. Grantee must annually perform the following:

- Provide training to the general public and mandated reporters, to provide information about reporting incidences of suspected abuse or neglect to APS.
- Increase the awareness of community gatekeepers, older adults, adults with disabilities, and the general public about elder/ dependent adult abuse, including its identification, prevention, and reporting.
- Maintain a fact sheet and training curriculum for service providers and veterans around financial exploitation and scams targeting Veteran's Administration Benefits.
- In collaboration with San Francisco's Veteran's Service Office, develop and disseminate a public awareness campaign aimed at increasing the awareness about scams targeting veterans.

- Develop a collaboration and communication system among service providers and professionals invested in the protection of veterans in order to improve stakeholder coordination around prevention activities.
- Provide specialized training to DAS staff including APS Workers and Veteran Services Officers around the identification of financial abuse and scams that target veterans.

In-Kind Services provided by Grantee include:

- Participation in Elder Abuse Forensic Center Steering Committee & Elder Abuse Services Contract Oversight Committee.
- Participation by Grantee marketing program to support DAS public relations efforts.

VI. Service Objectives

Grantee must annually meet the following unit of service objectives to the quantities indicated:

- Training Sessions for Professionals – Specify number of trained individuals in the general public, mandated reporters, and other professionals on elder abuse prevention in each fiscal year.

Unit: 1 Individual	No. of Individuals <u>1,000</u>
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- Public Education Sessions – Specify the total number of education sessions for the general public on the identification, prevention, reporting, and treatment of elder abuse, neglect, and exploitation.

Unit: One Session	No. of Sessions <u>12</u>
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- Training Sessions for Professionals – Specify the total number of training sessions for professionals, mandated reporters, and law enforcement (service providers, nurses, social workers) on the identification, prevention, reporting obligations, and treatment of elder abuse, neglect, and exploitation.

Unit: One Session	No. of Sessions <u>25</u>
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- Hours Spent Developing a Coordinated System to Respond to Elder Abuse – Specify the number of hours spent developing a coordinated system to respond to elder abuse. This would include but is not limited to activities that will assist elder abuse stakeholders to improve their coordinated identification and response to cases of elder and dependent adult abuse.

Unit: One Hour	No. of Hours <u>160</u>
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- Educational Materials Distributed –Specify the type and number of educational materials distributed to the general public, professionals, and caregivers (this may include materials that have been developed by others) to help in the identification, prevention, reporting, and treatment of elder abuse, neglect, and exploitation.

Unit: One Material	No. of Materials <u>3,000</u>
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No. of Individuals Reached through the above activities: 4,000

VII. Outcome Objectives

- At least 80 % of community partners surveyed will indicate good or excellent on an evaluation form of grantee’s education/training sessions.
- In the consumer satisfaction surveys conducted by the grantee, a minimum of 75% of respondents will state that they will be more likely to report suspected elder/dependent adult abuse as a result of the training.
- 80% of community partners attending training sessions on the Veterans Benefits Protection Project will indicate that they have increased knowledge of financial scams targeting veterans as a result of the training and are better able to report to proper resources and provide better services to clients.
- 85% of APS and VSO staff that receive training around financial scams impacting Veterans will report that they have learned something new as a result of the training.

VII. Reporting Requirements

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

- A. 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 5th working day of the month for the preceding month.
- B. Grantee shall submit to DAS/APS a quarterly report on the Elder Abuse Prevention 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>
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

- C. 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.
- D. Provider shall report total Elder Abuse Prevention 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 staff keep records of time studies or other basis of documenting actual time spent and charged to the program.
- E. Grantee will provide an annual consumer satisfaction survey report to DAS/APS by March 15 each grant year.
- F. 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.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA.

- H. 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

VIII. 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 (or delegate) participating in multidisciplinary team meetings, and carrying out coordination activities to facilitate the service and outcome objectives.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name
Institute On Aging

Term
7/1/21 - 6/30/25

(Check One) New Renewal Modification
If modification, Effective Date of Mod. No. of Mod.

Program: Elder Abuse Prevention Services					
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	\$120,490	\$120,490	\$120,490	\$120,490	\$481,959
Operating Expenses	\$9,957	\$9,957	\$9,957	\$9,957	\$39,828
Subtotal	\$130,447	\$130,447	\$130,447	\$130,447	\$521,787
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$19,567	\$19,567	\$19,567	\$19,567	\$78,268
Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$150,014	\$150,014	\$150,014	\$150,014	\$600,056
HSA Revenues					
General Funds	\$137,901	\$137,901	\$137,901	\$137,901	\$551,604
Federal Funds (CFDA 93.041)	\$12,113	\$12,113	\$12,113	\$12,113	\$48,452
TOTAL HSA REVENUES	\$150,014	\$150,014	\$150,014	\$150,014	\$600,056
Other Revenues					
Total Revenues	\$150,014	\$150,014	\$150,014	\$150,014	\$600,056
Full Time Equivalent (FTE)					
Prepared by: Matthew Mouille	Telephone No.:				
HSA-CO Review Signature: _____					
HSA #1					

Institute On Aging Program: Elder Abuse Prevention Services		Appendix B, Page 3				
Operating Expense Detail						
<u>Expenditure Category</u>	TERM	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>7/1/23 - 6/30/24</u>	<u>7/1/24 - 6/30/25</u>	TOTAL <u>7/1/21 - 6/30/25</u>
Rental of Property		\$3,637	\$3,637	\$3,637	\$3,637	\$14,548
Utilities		\$1,714	\$1,714	\$1,714	\$1,714	\$6,856
Office Supplies		\$506	\$506	\$506	\$506	\$2,024
Insurance		\$500	\$500	\$500	\$500	\$2,000
Staff Travel-(Local & Out of Town)		\$700	\$700	\$700	\$700	\$2,800
Training		\$400	\$400	\$400	\$400	\$1,600
Outreach Support (events participation, flyers signage)		\$1,300	\$1,300	\$1,300	\$1,300	\$5,200
Tech and License Fee		\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
CONSULTANTS						
						\$0
						\$0
						\$0
						\$0
						\$0
OTHER						
						\$0
						\$0
						\$0
						\$0
						\$0
TOTAL OPERATING EXPENSES		<u>\$9,957</u>	<u>\$9,957</u>	<u>\$9,957</u>	<u>\$9,957</u>	<u>\$39,828</u>
HSA #3						