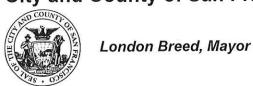
City and County of San Francisco



Human Services Agency

Department of Human Services
Department of Aging and Adult Services
Office of Early Care and Education

Trent Rhorer, Executive Director

MEMORANDUM

TO:

AGING & ADULT SERVICES COMMISSION

THROUGH:

SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

FROM:

CINDY KAUFFMAN, DEPUTY DIRECTOR

JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

14)

DATE:

JUNE 5, 2019

SUBJECT:

NEW GRANT: MULTIPLE GRANTEES (NON-PROFIT) FOR THE

PROVISION OF LEGAL SERVICES FOR OLDER ADULTS

(see table on the next page)

GRANT TERM:

7/1/19-6/30/20 Contingency

<u>Total</u>

GRANT AMOUNT:

\$1,238,298

\$123,829

State

\$1,362,127

FUNDING SOURCE

County

<u>Federal</u>

Contingency

TOTAL CONTRACTOR OF THE PARTY O

Total

ANNUAL AMOUNT

\$841,601

\$396,697

\$123,829

\$1,362,127

PERCENTAGE

68%

32%

100%

The Department of Aging and Adult Services (DAAS) requests authorization to enter into new grant agreements with multiple providers for the provision of Legal Services for Older Adults during the period of July 1, 2019 through June 30, 2020, in the combined amount of \$1,238,298 plus a 10% contingency for a total not to exceed amount of \$1,362,127. The specific breakdown of funding per grantee is summarized in the following table.

Grantee	FY 19/20	10% Contingency	Total Not to Exceed
Asian Americans Advancing Justice – Asian Law Caucus	\$186,391	\$18,639	\$205,030
Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)	\$200,000	\$20,000	\$220,000
Legal Assistance to the Elderly	\$575,120	\$57,512	\$632,632
Open Door Legal	\$126,997	\$12,699	\$139,696
UC Hastings College of the Law – Medical Legal Partnership for Seniors	\$149,790	\$14,979	\$164,769
Total	\$1,238,298	\$123,829	\$1,362,127

Background

Legal Services can be critical to maintaining or securing a better quality of life for older adults. DAAS' Legal Services providers work to provide their clients with information and advice designed to allow them to make informed decisions and assert their rights on a variety of issues. Legal Services program providers help eligible clients with a variety of legal issues which may include public benefit / income maintenance (such as public benefit applications and appeals), housing rights and eviction prevention, consumer fraud and debt collection issues, elder abuse prevention, simple will preparation, disability planning and advance directives, and immigration matters.

Services to be Provided

Grantees will operate a legal services program offering legal information and representation for older adults in need of assistance. Grantees have and will continue to develop legal expertise in areas most impacting older adults; Grantees are also expected to be informed about changes in the law that might affect the provision of services. Grantees should be as culturally and linguistically competent as possible to serve a diverse San Francisco population while also being experienced and knowledgeable about working with an older adult population.

Grantees will each offer an initial intake process for clients in need of legal services. Upon completion of screening, further services will fall into one of the following modules of service:

- 1. <u>Information and Referral</u> the client concern is more appropriately referred to another service for assistance.
- 2. <u>Advise and Close</u> the client issue is very easily addressed, advice is provided and the case is closed

- 3. <u>Brief Services</u> the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4. <u>Case Acceptance</u> the client issue warrants more extensive legal representation and a case file is opened, e.g. elder abuse, consumer fraud, reasonable accommodation for housing, etc.

Outcomes for legal services assistance can include stabilizing or improving a housing situation, increasing or maintaining an income source, securing protective court orders against someone harming an older adult, or deterring predatory collection and illegal business practices targeting an older adult.

Grantee Selections

Grantees were selected through Request for Proposals (RFP) 837, which was competitively bid in February 2019.

Funding

Funding will be provided through a Federal (32%) and County General Funds (68%).

ATTACHMENTS

Asian Americans Advancing Justice - Asian Law Caucus

Appendix A- Services to be Provided

Appendix B- Program Budget

Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)

Appendix A- Services to be Provided

Appendix B- Program Budget

Legal Assistance to the Elderly

Appendix A- Services to be Provided

Appendix B- Program Budget

Open Door Legal

Appendix A- Services to be Provided

Appendix B- Program Budget

UC Hastings College of the Law - Medical Legal Partnership for Seniors

Appendix A- Services to be Provided

Appendix B- Program Budget

APPENDIX A

ASIAN AMERICANS ADVANCING JUSTICE – ASIAN LAW CAUCUS

LEGAL SERVICES FOR OLDER ADULTS

July 1, 2019 – June 30, 2020

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

II. Definitions

California State Bar The State Bar of California is the regulatory agency for the State's

lawyers, charged with admitting and disciplining attorneys.

CARBON Contracts Administration, Reporting, and Billing Online System

DAAS Department of Aging and Adult 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) Selfcare: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and selfdirection; c) Cognitive functioning, and emotional adjustment

Frail An individual determined to be functionally impaired in one or both

of the following areas: (a) unable to perform two or more activities of

daily living (such as bathing, toileting, dressing, eating, and

transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety

hazard to the individual or others.

Grantee Asian Americans Advancing Justice – Asian Law Caucus

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to older

1

individuals with economic or social needs; and includes – (i) to the

extent feasible, counseling or other appropriate assistance by a

paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

LGBTO+

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 100% 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.

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.

OAA

Older Americans Act

Older Adult

Person who is 60 years or older, used interchangeably with senior

Senior

Person who is 60 years or older, used interchangeably with older adult

SOGI

Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104,

Sections 104.1 through 104.9).

III. Target Population

According to the federal mandates of the Older Americans Act, 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. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

ALC's offices are located at 55 Columbus Avenue in San Francisco. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and interventions are critical to maintaining or securing a better quality of life affecting older adults. Legal service providers often work in conjunction with other service providers to carefully assess and triage consumer needs.

Consumers contacting legal services go through an initial screening process. Legal providers then categorize the services they provide into one of the following four modules:

- 1) <u>Information and Referral</u> the consumer concern is more appropriately referred to another service for assistance
- 2) <u>Advise and Close</u> the consumer issue is very easily addressed, advice is provided and the case is closed
- 3) <u>Brief Services</u> the consumer is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) <u>Case Acceptance</u> the consumer issue warrants more extensive legal representation and a case file is opened, i.e., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) <u>Income/Nutrition</u>: SSI, Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) <u>Healthcare</u>: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that effect older adults, particularly in the issue areas in which services are provided. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal Services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service programs.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAAS/OOA legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

VII. Service Objectives

On an annual basis:

- Grantee will serve <u>160</u> unduplicated consumers.
- Grantee will provide <u>2,200</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.
- Grantee will provide <u>200</u> units of service of staffing hours to support the publication of a legal services newsletter as an outreach and educational tool. Staffing hours will include: attending planning meetings, researching, writing, editing, and sending copy to be published, and distribution.

VIII. Outcome Objectives

Completion and submission of the following reports will be used to measure the amount, range, and impact of services provided.

- 1. Grantee will, on a quarterly basis, complete and submit to the OOA analyst the California Department of Aging (CDA) standardized Legal Services Report (Form 1022) which includes the following:
 - a. Total clients served including aggregate demographic information
 - b. Total number of cases closed during the quarter
 - c. Description of module of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
 - d. Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
 - e. Community education, outreach efforts, and client narratives

The completed form shall be completed and submitted to OOA based on the following deadlines:

- a. 1st Quarter (covering July, August, September 2019) due October 25th, 2019
- b. 2nd Quarter (covering October, November, December 2019) due January 25th, 2019
- c. 3rd Quarter (covering January, February, March 2020) due April 25th, 2020
- d. 4th Quarter (covering April, May, June 2020) due July 25th, 2020
- 2. Grantee will, on a twice yearly basis, provide a report categorizing each case closed into a series of standardized categories based on the outcome of the closed case (e.g. obtained, preserved, or increased disability or age related benefit to which entitled, prevented loss of current housing, etc.).

Reporting will be completed via a standardized form developed by Office on the Aging staff and provided to Grantee. Report will be submitted by December 31st and June 30th each year and cover the previous 6 month contract period.

Collecting outcomes through this manner will allow DAAS and Grantee to track positive outcomes in a year (and in turn to measure the value of a program) as well as comparing the outcomes from year to year. Results from these outcome reports may help establish benchmarks for performance in future years.

IX. Reporting 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 Service Objectives 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 and include Service Objectives
- C. 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 shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th and shall be submitted via the CARBON system.
- E. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- F. 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.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Grantee will assure that services delivered are consistent with professional standards for this service.
- I. Pursuant to California Department of Aging Requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- J. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 Consumer Grievance Policy.
- K. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults connect to services throughout the City. These Focal Points are:

Designated Community Focal Points							
Name	Address	Phone					
Western Addition Senior Center	1390 1/2 Turk St, San Francisco, 94115	415-921-7805					
Bayview Senior Connections	5600 3rd St, San Francisco, 94124	415-647-5353					
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132	415-335-5558					
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121	415-404-2938					
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131	415-550-2221					
Openhouse	1800 Market St, San Francisco, 94102	415-347-8509					
SF Senior Center (SFSC)	481 O'Farrell St, San Francisco, 94102	415-202-2983					
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109	415-202-2983					
South Sunset Senior Center (SHE)	2601 40th Ave , San Francisco, 94116	415-566-2845					
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133	415-677-7585					
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108	415-438-9804					
Toolworks	25 Kearny St, San Francisco, 94108	415-733-0990					
DAAS Benefits and Services Hub	2 Gough St, San Francisco, 94103	415-355-6700					

L. For assistance with reporting requirements or submission of reports, please contact:

Reanna Albert
Program Analyst, Office on the Aging
DAAS
P.O. Box 7988
San Francisco, CA 94120-7988
reanna.albert@sfgov.org

and

Esperanza Zapien
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
(415) 355-3607
esperanza.zapien@sfgov.org

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to 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 CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of

training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

Appendix B, Page 1 HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM			В	c I	D I	E						
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Program: Legal Services												
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Program Term	\neg					10lai						
Program Term Prog	10	Budget Reference Page No.(s)										
3 Salaries & Benefits	11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21		7/1/19-6/30/20						
4 Operating Expenses	12	DAAS Expenditures				A.05.075						
Subtotal Single	13	Salaries & Benefits										
Communication Community	14	Operating Expenses										
10 10 10 10 10 10 10 10	15	Subtotal				\$169,446						
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## Total DAAS & Non-DAAS Revenues	46	Project Income	\$0									
49 Full Time Equivalent (FTE) 51 Prepared by: Telephone No.: 52 HSA-CO Review Signature:	47	TOTAL NON-DAAS REVENUES	\$524,723	\$0								
Prepared by: Telephone No.: HSA-CO Review Signature:	48	Total DAAS & Non-DAAS Revenues	\$711,114	\$0	\$0	\$711,114						
52 HSA-CO Review Signature:	49	Full Time Equivalent (FTE)			1	<u></u>						
	51	Prepared by:	Telephone No.:									
53 HSA #1	52	HSA-CO Review Signature:			_							
	53	HSA #1										

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11	H.S.A-DAAS	Agency	U(a)S	% FTE	og, am	0,000			
		Annual Full TimeSalary	Total	funded by HSA	Adjusted				
12	POSITION TITLE and NAME	for FTE	FTE	(Max 100%)	FTE	Budgeted Salary	Budgeled Salary	Budgeted Salary	Budgeted Salary
13	Housing Attorney	\$73,099	1.00	54%	0.54	\$39,473			\$39,473
14	Housing Attorney	\$72,455	1.00	49%	0.49	\$35,219			\$35,219
15	Housing Community Advocate	\$63,534	1.00	2%	0.02	\$1,289			\$1,269
16	Litigation Director	\$114,060	1.00	5%	0.05	\$5,703			\$5,703
\Box	Grants and Administrative Manage	\$77,748	1.00	22%	0.22	\$16,868			\$16,888
	Deputy Director	\$123,585	1.00	10%	0.10	\$12,359			\$12,359
	Intake Coordinator	\$73,548	1.00	29%	0.29	\$21,329			\$21,329
20									
21									
22									
23	TOTAL H.S.A-DAAS	\$598,029	7.00	1.71	1.71	\$132,220	\$0	\$0	\$132,220
24									
	FRINGE BENEFIT RATE	25%							
	EMPLOYEE FRINGE BENEFITS					\$33,055	\$0	\$0	\$33,055
27									
28								,	
	TOTAL DAAS SALARIES & BENEFITS	\$598,029				\$166,275	\$0	\$0	\$165,275
29 30	DEIVERIS	, 0300,020	tures de contra de contra	1945050 000 000 000 000 000	monta macini in management				
31	Non - DAAS	Agency *	Totals	HSA Pr	manoo	NON-DAAS	NON-DAAS	NON-DAAS	TOTAL
۳	11011 01 1110			% FTE					
		Annual Full TimeSalary	Totai	funded by HSA	Adjusted				
32	POSITION TITLE and NAME	for FTE	FTE	(Max 100%)	FTE	Budgeted Salary	Budgeted Salary	Budgeled Salary	Budgeted Salary
33	Housing Attorney	\$73,099	1.00	46%	0.46	\$33,626			\$33,626
34	Housing Attorney	\$72,455	1.00	51%	0.51	\$37,236			\$37,236
	Housing Attorney	\$62,524	1.00	100%	1.00	\$62,524			\$62,524
36	Housing Community Advocate	\$63,534	1.00	98%	0.98	\$62,265			\$62,265
$\overline{}$	Housing Community Advocate	\$52,268	1,00	100%	1,00	\$52,268			\$52,268 \$6,433
	Litigation Director	\$114,060	1.00	6%	0.06	\$6,422			\$6,422 \$52,291
	Paralegal	\$52,291	1.00	100%	1.00	\$52,291			\$15,756
40	Legal Coordinator	\$65,651	1.00	24%	0.24	\$15,756			\$10,100
41	Grants and Administrative Manager	\$77,748	1.00	15%	0.15	\$11,366			\$11,366
42	Deputy Director	\$123,585	1.00	4%	0.04	\$5,259			\$5,259
43	Intake Coordinator	\$73,548	1.00	21%	0.21	\$15,604			\$15,604
44									
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52			 -		<u> </u>	<u> </u>		-	
53					 			 	0054.017
54	TOTAL NON-DAAS	\$830,763	11.00	5.65	5.65	\$354,617	\$0	\$0	\$354,617
55			1						
	FRINGE BENEFIT RATE	25%	1000000				1		200 771
57	EMPLOYEE FRINGE BENEFITS	L		1	ı	\$88,854	\$0	\$0	\$88,654
58	TOTAL Non-DAAS SALARIES &					I	1		
59	BENEFITS	\$830,763				\$443,271	\$0	\$0	\$443,271
60			1300000000	· Colorado Antonio	I San Carlo	1			
64	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$1,428,792				\$608,546	\$0	\$0	\$608,546
61 62	HSA #2	V1.720,182	Trees and the same of	**************************************	A CONTRACTOR OF THE PARTY OF TH	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			1/0/1909
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64 65									
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1						,	Appendix B, Page 3
3	Asian Americans Advancing Justice-Asian	Law	Caucus				
4	Program: Legal Services						
5 6							
7		Ope	rating Expense	Detail			
8							
9							
	H.S.A-DAAS						TOTAL
	······································	ERM	7/1/19-6/30/20				7/1/19-6/30/20
	Rental of Property						
	Utilities(Elec, Water, Gas, Phone, Garbage)						
	Office Supplies, Postage						
	Building Maintenance Supplies and Repair						
	Printing and Reproduction		\$1,207	****			\$1,207
	insurance		\$1,400			***************************************	\$1,400
	Staff Training						\$550
	Staff Travel-(Local & Out of Town)		\$550				4550
21	Rental of Equipment		***************************************				
22							
23	CONSULTANTS						
24							
25							
26							
27	OTHER						
28	Legal and other dues		\$302				\$302
29	Client costs		\$356				\$356
30	Libraary/Legal/Research		\$356				\$356
31	TOTAL DAAS OPERATING EXPENSE		\$4,171				\$4,171
32	Non-DAAS						
33	Expenditure Category	TERM	7/1/19-6/30/20	-			7/1/19-6/30/20
34	Rental of Property						
35	Utilities(Elec, Water, Gas, Phone, Garbage)						
36	Office Supplies, Postage		\$350				\$350
37	Building Maintenance Supplies and Repair						
38	Printing and Reproduction		\$1,500				\$1,500
39	Insurance						
40	Staff Training		\$3,600				\$3,600
41	Staff Travel-(i.ocal & Out of Town)		\$500				\$500
42	Rental of Equipment						
43							
	CONSULTANTS						
	Contract labor		\$9,573				\$9,573
46							
47							
	OTHER						
	Litigation cost		\$17,500				\$17,500
	Food for presentation/training		\$80				\$80
51							
52	TOTAL Non-DAAS OPERATING EXPENSE		\$33,103				\$33,103
53							
54	TOTAL DAAS & Non-DAAS OPERATING EXP	ENSE	\$37,274				\$37,274
55	HSA #3				.,		1/0/1900

APPENDIX A

Asian Pacific Islander Legal Outreach (dba of Nihonmachi Legal Outreach)

LEGAL SERVICES FOR OLDER ADULTS

July 1, 2019 – June 30, 2020

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

II. Definitions

California State Bar The State Bar of California is the regulatory agency for the State's

lawyers, charged with admitting and disciplining attorneys.

CARBON Contracts Administration, Reporting, and Billing Online System

DAAS Department of Aging and Adult 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

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.

Grantee Asian Pacific Islander Legal Outreach (dba of Nihonmachi Legal

Outreach)

HSA Human Services Agency of City and County of San Francisco

Legal Assistance

Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes — (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

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 100% 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.

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.

OAA

Older Americans Act

Older Adult

Person who is 60 years or older, used interchangeably with senior

Senior

Person who is 60 years or older, used interchangeably with older adult

SOGI

Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

According to the federal mandates of the Older Americans Act, 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. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

Legal Services are provided at Grantee's main office located at 1121 Mission Street in San Francisco. Services are provided Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and interventions are critical to maintaining or securing a better quality of life affecting older adults. Legal service providers often work in conjunction with other service providers to carefully assess and triage consumer needs.

Consumers contacting legal services go through an initial screening process. Legal providers then categorize the services they provide into one of the following four modules:

- 1) <u>Information and Referral</u> the consumer concern is more appropriately referred to another service for assistance
- 2) Advise and Close the consumer issue is very easily addressed, advice is provided and the case is closed
- 3) <u>Brief Services</u> the consumer is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) <u>Case Acceptance</u> the consumer issue warrants more extensive legal representation and a case file is opened, i.e., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) <u>Income/Nutrition</u>: SSI, Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) <u>Healthcare</u>: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that effect older adults, particularly in the issue areas in which services are provided. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal Services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service programs.

VII. Service Objectives

On an annual basis:

- Grantee will serve <u>154</u> unduplicated consumers.
- Grantee will provide <u>1,650</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

VIII. Outcome Objectives

Completion and submission of the following reports will be used to measure the amount, range, and impact of services provided.

- 1. Grantee will, on a quarterly basis, complete and submit to the OOA analyst the California Department of Aging (CDA) standardized Legal Services Report (Form 1022) which includes the following:
 - a. Total clients served including aggregate demographic information
 - b. Total number of cases closed during the quarter
 - c. Description of module of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
 - d. Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
 - e. Community education, outreach efforts, and client narratives

The completed form shall be completed and submitted to OOA based on the following deadlines:

- a. 1st Quarter (covering July, August, September 2019) due October 25th, 2019
- b. 2nd Quarter (covering October, November, December 2019) due January 25th, 2019
- c. 3rd Quarter (covering January, February, March 2020) due April 25th, 2020
- d. 4th Quarter (covering April, May, June 2020) due July 25th, 2020
- 2. Grantee will, on a twice yearly basis, provide a report categorizing each case closed into a series of standardized categories based on the outcome of the closed case (e.g. obtained, preserved, or increased disability or age related benefit to which entitled, prevented loss of current housing, etc.).

Reporting will be completed via a standardized form developed by Office on the Aging staff and provided to Grantee. Report will be submitted by December 31st and June 30th each year and cover the previous 6 month contract period.

Collecting outcomes through this manner will allow DAAS and Grantee to track positive outcomes in a year (and in turn to measure the value of a program) as well as comparing the outcomes from year to year. Results from these outcome reports may help establish benchmarks for performance in future years.

IX. Reporting 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 Service Objectives 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 and include Service Objectives

- C. 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 shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th and shall be submitted via the CARBON system.
- E. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- F. 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.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Grantee will assure that services delivered are consistent with professional standards for this service.
- I. Pursuant to California Department of Aging Requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- J. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 Consumer Grievance Policy.

K. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults connect to services throughout the City. These Focal Points are:

Designated Community Focal Points							
Name	Address	Phone					
Western Addition Senior Center	1390 1/2 Turk St, San Francisco, 94115	415-921-7805					
Bayview Senior Connections	5600 3rd St, San Francisco, 94124	415-647-5353					
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132	415-335-5558					
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121	415-404-2938					
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131	415-550-2221					
Openhouse	1800 Market St, San Francisco, 94102	415-347-8509					
SF Senior Center (SFSC)	481 O'Farrell St, San Francisco, 94102	415-202-2983					
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109	415-202-2983					
South Sunset Senior Center (SHE)	2601 40th Ave , San Francisco, 94116	415-566-2845					
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133	415-677-7585					
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108	415-438-9804					
Toolworks	25 Kearny St, San Francisco, 94108	415-733-0990					
DAAS Benefits and Services Hub	2 Gough St, San Francisco, 94103	415-355-6700					

L. For assistance with reporting requirements or submission of reports, please contact:

Michael Zaugg
Director, Office on the Aging
DAAS
Michael.Zaugg@sfgov.org

Steve Kim
Contract Manager
Human Services Agency
Steve.Kim@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to 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 CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VII and VIII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	Α	В	С	D
1				Appendix B, Page 1
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3	HUMAN SERVICES AGE	NCY BUDGET SUMMA	ARY	
4	·			
5	Name	Term		
	Asian Pacific Islander Legal Outreach			
6	(DBA of Nihonmachi Legal Outreach)	7/1/19-6/30/20		A DESCRIPTION OF THE PARTY OF T
7	(Check One) New 🗸 Renewal	Modification		
8	If modification, Effective Date of Mod.	No. of Mod.		
9	Program: Legal Services			
10	Budget Reference Page No.(s)			
	Program Term	7/1/19-6/30/20		Total
12	Expenditures			
13	Salaries & Benefits	\$133,672		\$133,672
14	Operating Expenses	\$40,241		\$40,241
15	Subtotal	\$173,913		\$173,913
16	Indirect Percentage (%)	15.00%		15.00%
17	Indirect Cost (Line 16 X Line 15)	\$26,087		\$26,087
18	Capital/Subcontractor Expenditures	\$0		\$0
19	Total Expenditures	\$200,000		\$200,000
20	HSA Revenues			
21	Account of the second of the s	#000,000		¢200,000
22	General Fund	\$200,000		\$200,000
23 24				
25				
26				
27				
28				
	TOTAL HSA REVENUES	\$200,000		\$200,000
30	Other Revenues			
31				
32 33				
34				
35				
36	Total Revenues	\$200,000		\$200,000
37	Full Time Equivalent (FTE)	5.00		
39	Prepared by: Lorraine Yoshikawa/Dean Ito T	elephone No.: 415 567 6255		Date: 05/17/2019
40	HSA-CO Review Signature:			
41	HSA #1	•		6/5/2019

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2 3 Asian Pacific Islander Legal Outrea	ch (DRA of Ni	honmachi	Lenal Outread	h)							
4 Program: Legal Services	CII (DDM OL IVI	nonnacili	Legai Oulleat	11/							
5 (Same as Line 9 on HSA #1)											
6											
7	Salaries & Benefits Detail										
8											
9					=////A 0/00/00	7/4/40 0/00/00					
10			LICA D.		7/1/19-6/30/20 DAAS	7/1/19-6/30/20 TOTAL					
11	Agency 1	otais	HSA Pr % FTE	ogram	DAAS	IOIAL					
	Annual Full		funded by								
DOUTION TITLE	TimeSalary	Total	HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary					
12 POSITION TITLE	for FTE.	FTE	`								
13 Supervising Attorney	\$70,000	1.00	50%	0.50	\$35,000	\$35,000					
14 Staff Attorney	\$57,000	1.00	50%	0.50	\$28,500	\$28,500					
15 Legal Assistant/Paralegal	\$46,000	1.00	50%	0.50	\$23,000	\$23,000					
16 Translator/Admin Support	\$50,000	1.00	25%	0.25	\$12,500	\$12,500					
17 Managing Attorney	\$88,000	1.00	10%	0.10	\$8,800	\$8,800					
18											
19											
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28	044 000	^ -	400	405	6407.000	\$107,800					
29 TOTALS	311,000	5.00	1.85	1.85	\$107,800	<u> Φ107,000</u>					
30	240/	1									
31 FRINGE BENEFIT RATE 32 EMPLOYEE FRINGE BENEFITS	24% \$74,640				\$25,872	\$25,872					
33											
					·						
34 35 TOTAL SALARIES & BENEFITS	\$385,640				\$133,672	\$133,672					
36 HSA #2	,					6/5/2019					

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7				0		D	_1_1		
8				Oper	ating Exper	ise D	etali		
9									
11									
12									TOTAL
13	Expenditure C	Category		TERM_	7/1/19-6/30/2	<u>o</u> -			/19-6/30/20
14	Rental of Prop	perty		-					
15	Utilities(Elec,	Water, Gas,	Phone, Garbag	je, Intern _i	\$6,30	00		\$	6,300
16	Office Supplie	s, Postage			\$4,6	70		\$	4,670
17	Building Main	tenance Supp	olies and Repai	ir .	\$8,3	35_			8,335
18	Printing and F	Reproduction							
19	Insurance				\$2,2	50_		\$	2,250
20	Staff Training			-	\$9	16			916
21	Staff Travel-(l	_ocal & Out o	f Town)						
22	Rental of Equ	ipment							
23									
24	CONSULTAN	ITS							
25									4 000
—	Audit				\$ 1,6	<u> 20</u>			1,620
27									
	OTHER				\$4,0	nn		\$	4,000
	Newsletter Building Occu	ınancv		***************************************	\$12,1			Ψ	12,150
31	Banany Cook	ipanoy			¥ 1 ·				
	TOTAL OPER	RATING EXP	ENSE		\$ 40,2	<u>41</u>			40,241
33									
	HSA #3								6/5/2019

APPENDIX A

LEGAL ASSISTANCE TO THE ELDERLY INC.

LEGAL SERVICES FOR OLDER ADULTS

July 1, 2019 – June 30, 2020

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

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DAAS Department of Aging and Adult Services

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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.

Grantee Legal Assistance to the Elderly (LAE)

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to older

individuals with economic or social needs; and includes – (i) to the

extent feasible, counseling or other appropriate assistance by a

paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

LGBTQ+

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Low Income

Having income at or below 100% 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.

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.

OAA

Older Americans Act

Older Adult

Person who is 60 years or older, used interchangeably with senior

Senior

Person who is 60 years or older, used interchangeably with older adult

SOGI

Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

According to the federal mandates of the Older Americans Act, 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. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

Legal Assistance to the Elderly's office is located at 701 Sutter St., 2nd floor, San Francisco, CA 94109. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and interventions are critical to maintaining or securing a better quality of life affecting older adults. Legal service providers often work in conjunction with other service providers to carefully assess and triage consumer needs.

Consumers contacting legal services go through an initial screening process. Legal providers then categorize the services they provide into one of the following four modules:

- 1) <u>Information and Referral</u> the consumer concern is more appropriately referred to another service for assistance
- 2) <u>Advise and Close</u> the consumer issue is very easily addressed, advice is provided and the case is closed
- 3) <u>Brief Services</u> the consumer is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) <u>Case Acceptance</u> the consumer issue warrants more extensive legal representation and a case file is opened, i.e., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) <u>Income/Nutrition</u>: SSI, Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) <u>Healthcare</u>: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that effect older adults, particularly in the issue areas in which services are provided. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal Services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service programs.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAAS/OOA legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

VII. Service Objectives

On an annual basis:

- Grantee will serve <u>886</u> unduplicated consumers.
- Grantee will provide <u>6,504</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.
- Grantee will provide <u>40</u> units of service of staffing hours to support the publication of a legal services newsletter as an outreach and educational tool. Staffing hours will include: attending planning meetings, researching, writing, editing, and sending copy to be published, and distribution.

VIII. Outcome Objectives

Completion and submission of the following reports will be used to measure the amount, range, and impact of services provided.

- 1. Grantee will, on a quarterly basis, complete and submit to the OOA analyst the California Department of Aging (CDA) standardized Legal Services Report (Form 1022) which includes the following:
 - a. Total clients served including aggregate demographic information
 - b. Total number of cases closed during the quarter
 - c. Description of module of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
 - d. Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
 - e. Community education, outreach efforts, and client narratives

The completed form shall be completed and submitted to OOA based on the following deadlines:

- a. 1st Quarter (covering July, August, September 2019) due October 25th, 2019
- b. 2nd Quarter (covering October, November, December 2019) due January 25th, 2019
- c. 3rd Quarter (covering January, February, March 2020) due April 25th, 2020
- d. 4th Quarter (covering April, May, June 2020) due July 25th, 2020
- 2. Grantee will, on a twice yearly basis, provide a report categorizing each case closed into a series of standardized categories based on the outcome of the closed case (e.g. obtained, preserved, or increased disability or age related benefit to which entitled, prevented loss of current housing, etc.).

Reporting will be completed via a standardized form developed by Office on the Aging staff and provided to Grantee. Report will be submitted by December 31st and June 30th each year and cover the previous 6 month contract period.

Collecting outcomes through this manner will allow DAAS and Grantee to track positive outcomes in a year (and in turn to measure the value of a program) as well as comparing the outcomes from year to year. Results from these outcome reports may help establish benchmarks for performance in future years.

IX. Reporting 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 Service Objectives 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 and include Service Objectives
- C. 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 shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th and shall be submitted via the CARBON system.
- E. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- F. 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.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Grantee will assure that services delivered are consistent with professional standards for this service.
- I. Pursuant to California Department of Aging Requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- J. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 Consumer Grievance Policy.
- K. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults connect to services throughout the City. These Focal Points are:

Designated Community Focal Points							
Name	Address	Phone					
Western Addition Senior Center	1390 1/2 Turk St, San Francisco, 94115	415-921-7805					
Bayview Senior Connections	5600 3rd St, San Francisco, 94124	415-647-5353					
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132	415-335-5558					
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121	415-404-2938					
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131	415-550-2221					
Openhouse	1800 Market St, San Francisco, 94102	415-347-8509					
SF Senior Center (SFSC)	481 O'Farrell St, San Francisco, 94102	415-202-2983					
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109	415-202-2983					
South Sunset Senior Center (SHE)	2601 40th Ave , San Francisco, 94116	415-566-2845					
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133	415-677-7585					
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108	415-438-9804					
Toolworks	25 Kearny St, San Francisco, 94108	415-733-0990					
DAAS Benefits and Services Hub	2 Gough St, San Francisco, 94103	415-355-6700					

L. For assistance with reporting requirements or submission of reports, please contact:

Reanna Albert
Program Analyst, Office on the Aging
DAAS
P.O. Box 7988
San Francisco, CA 94120-7988
reanna.albert@sfgov.org

and

David Kashani
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
(415) 355-3607
david.kashani@sfgov.org

X. Monitoring Activities

A. <u>Program Monitoring</u>: Program monitoring will include review of compliance to 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 CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of

training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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	Α	В	C D
1	Α	<u> </u>	Appendix B, Page 1
2			
3	HUMAN SERVICES AGEN	CY BUDGET SUMM/ BY PROGRAM	
5	Name	BIFROGRAM	Term
	egal Assistance to the Elderly Inc.		7/1/19-6/30/20
_	Check One) New 🔽 Renewal	Modification	
I `	f modification, Effective Date of Mod.	No. of Mod.	
	Program: Legal Services		Total
<u>1</u>	Budget Reference Page No.(s)		
	Program Term	7/1/19-6/30/20	7/1/19-6/30/20
_	DAAS Expenditures		
	Salaries & Benefits	\$418,388	\$418,38
	Operating Expenses	\$104,449	\$104,44
	Subtotal	\$522,837	\$522,83
	ndirect Percentage (%) - CDA 10%	10%	10
	CDA Indirect Cost (Line 16 X Line 15)	\$52,283	\$52,28
_	ndirect Percentage (%) - GF %	0%	
		\$0	\$
	GF Indirect Cost (Line 18 X Line 15) Subcontractor/Capital Expenditures	\$0	\$
-	TOTAL DAAS EXPENDITURES	\$575,120	\$575,12
22	TOTAL BAAG DAY 2.1.D. TOTAL		
	Non-DAAS Expenditures	***************************************	
_	Salaries & Benefits	\$101,243	\$101,24
	Operating Expense	\$9,345	\$9,34
\neg	Subtotal	\$110,587	\$110,58
	Indirect Percentage (%) -	2%	2
28	Indirect costs	\$11,182	\$11,18
	Subcontractor/ Capital Expenditures	\$0	•
_	TOTAL Non-DAAS EXPENDITURES	\$121,769	\$121,76
31			
- 1.	TOTAL DAAS & Non-DAAS	#c06 800	\$696,88
-	EXPENDITURES	\$696,889	1 \$0.90,00
33	HSA-DAAS Revenues		
		\$264,426	\$264,42
	General Fund CFDA #93.044	\$310,694	\$310,69
		ψο το, σο τ	
37	TOTAL HSA-DAAS REVENUES	\$575,120	\$575,12
	TOTAL HOA-DAAG REVERGES	40,0,120	
39	Non-DAAS Revenues	<u> </u>	
		\$8,000	\$8,00
	Project Income	\$38,552	\$38,5
	Fundraising Great Funding	\$60,817	\$60,8
	Grant Funding Volunteer In kind	\$14,400	\$14,4
\neg	Volunteer In kind TOTAL NON-DAAS REVENUES	\$121,769	\$121,70
\neg	Total DAAS & Non-DAAS Revenues	\$696,889	\$696,8
\neg		φοσο,σσο	4500,0
47	Full Time Equivalent (FTE)	Talanhana Na	
1		LEVENDONE NO 1	
	Prepared by: HSA-CO Review Signature:	Telephone No.:	

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1	^		<u> </u>				Appendix B, Page 2				
2	t t a natataman to the Eldevis In	•									
	Legal Assistance to the Elderly In Program: Legal Services	6.									
5	1 -										
6	O. L. dec O. December Codes										
7	Salaries & Benefits Detail										
9											
10					Terrer Tradition and Section 2	7/1/19-6/30/20	7/1/19-6/30/20				
11	H.S.A-DAAS	Agency T Annual Full	otals	HSA Prog % FTE funded	gram (discission	DAAS	TOTAL				
		TimeSalary		by HSA	Adjusted		Budantad Galant				
12	POSITION TITLE and NAME	for FTE	Total FTE	(Max 100%)	FTE	Budgeted Salary	Budgeted Salary				
13	Executive Director	\$98,399	1.00	49%	0.49	\$47,826	\$47,826				
14	Supervising Attorney	\$84,500	1.00	43%	0.43	\$36,318	\$36,318				
15	Senior Staff Attorney- Elder Abuse	\$90,054	1.00	95%	0.95	\$85,296	\$85,296				
16	Staff Attorney-Benefits	\$77,620	0.80	82%	0.65	\$50,640	\$50,640				
17	Staff Attorney-Health/Fair Housing	\$66,709	1.00	6%	0.06	\$3,746	\$3,746				
18	Staff Attorney-Consumer	\$64,602	1.00	40%	0,40	\$25,840	\$25,840				
	Staff Attorney-Housing	\$62,500	1.00	21%	0.21	\$12,943	\$12,943				
	Staff Attorney	\$63,500	1.00	60%	0.60	\$38,123	\$38,123				
	Intake Paralegal	\$48,000	1.00	11%	0.11	\$5,298	\$5,298				
	Paralegal-Housing	\$58,000	1.00	44%	0.44	\$25,520	\$25,520				
	Paralegal	\$49,100	1.00	21%	0.21	\$10,265	\$10,265				
24											
25											
26	TOTAL H.S.A-DAAS	\$762,984	10.80	470%	4,54	\$341,815	\$341,815				
27	TOTAL MOIN DANG	*/ · · · · · ·									
	FRINGE BENEFIT RATE	22.40%									
	EMPLOYEE FRINGE BENEFITS	\$170,923				\$76,573	\$76,573				
30											
31											
	TOTAL DAAS SALARIES &	****				\$418,388	\$418,388				
	BENEFITS	\$933,907				\$410,300	\$410,360				
33	Non DAAS		Fatala	HSA Pro	oram	NON-DAAS	TOTAL				
34	Non - DAAS	Agency 1	Qiais	% FTE funded	gracer .	NON-BACK	(0134				
0.5		TimeSalary	Total CTC	by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary				
	POSITION TITLE and NAME	for FTE	Total FTE 1.00	(Max 100%) 0%		Budgeted Salary	Duagotou outury				
	Executive Director	\$98,399 \$84,500	1.00	32%	0.32	\$27,258	\$27,258				
37 38	Supervising Attorney Senior Staff Attorney- Elder Abuse	\$90,054	1.00	5%	0.05	\$4,758					
	Staff Attorney-Benefits	\$77,620	0.80	0%		7.11.02					
	Staff Attorney-Health/Fair Housing	\$66,709		0%	_						
	Staff Attorney-Consumer	\$64,602		0%	1						
	Staff Attorney-Housing	\$62,500		0%							
	Staff Attorney	\$63,500		0%	-						
	Intake Paralegal	\$48,000		55%	0.55	\$26,346	\$26,346				
	Paralegal-Housing	\$58,000	1.00	0%							
46	Volunteer Receptionsil	\$14,400	0.50	0%		\$14,400	\$14,400				
47	Paralegal	\$49,100	1.00	0%	-						
48	TOTAL NON-DAAS	\$777,384	11.30	0.92	0.92	\$72,762	\$72,762				
49			1								
50	FRINGE BENEFIT RATE	25%	2.000.00			25%					
51	EMPLOYEE FRINGE BENEFITS	\$196,989.11	65.8616			\$18,438	\$18,438				
52	FRINGE BENEFIT RATE DIFFERENCE	2.94%				\$10,043	\$10,043				
53	Da I ENGINOE	L 2.3470	naprice Spiest			, 710,010	1.3,010				
33	TOTAL Non-DAAS SALARIES &										
54	BENEFITS	\$974,373				\$101,243	\$101,243				
55	TOTAL DAAG 8 Nov. DAAG						T T T T T T T T T T T T T T T T T T T				
56	TOTAL DAAS & Non-DAAS SALARIES & BENEFITS	\$1,908,280				\$519,631	\$519,631				
_	HSA #2						1/0/1900				
~ '	, 										

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2					Аррі	endix B, Page 3
3	Legal Assistance to the Elderly Inc.					
4	Program: Legal Services					
5 6						
7		Ope	rating Expen	se Detai	1	
8						
9 10						
	H & V"DVV&					TOTAL
-			********			
12	Expenditure Category	TERM	7/1/19-6/30/20			7/1/19-6/30/20
13	Rental of Property		\$62,096			\$62,096
14	Utilities(Elec, Water, Gas, Phone, Garbage)		\$5,760			\$5,760
15	Office Supplies, Postage		\$8,212	<u> </u>		\$8,212
16	Building Maintenance Supplies and Repair		\$700			\$700
17	Printing and Reproduction		\$900			\$900
	Insurance		\$5,760			\$5,760
	Staff Training		\$500			\$500
	_					\$100
	Staff Travel-(Local & Out of Town)		\$100			
21	Rental of Equipment		\$1,600			\$1,600
22						
23	CONSULTANTS					
24						
25						
26						
27	OTHER					
	VOLUNTEER EXPENSE		\$990			\$990
	LAW LIBRARY	•	\$4,000			\$4,000
		•				\$6,850
30		•	\$6,850			
	STATE BAR DUES	•	\$2,800			\$2,800
32	MEMBERSHIP		\$518			\$518
33	JANITORIAL SERVICE		\$3,663			\$3,663
34						
35						
36	TOTAL DAAS OPERATING EXPENSE		\$104,449			\$104,449
37	Non-DAAS					
38	Expenditure Category	TERM	7/1/19-6/30/20)		7/1/19-6/30/20
	Rental of Property		\$5,111			\$5,111
	Utilities(Elec, Water, Gas, Phone, Garbage)					
			¢1 73 <i>A</i>			\$1,734
_	Office Supplies, Postage		\$1,734			φι,νοη
	Building Maintenance Supplies and Repair		44-			
43	Printing and Reproduction			-		
44	Insurance					4
45	Staff Training					L
46	Staff Travel-(Local & Out of Town)					
47	Rental of Equipment					
48						
49	CONSULTANTS					
50						
51		•				
		_				
52	0.7115					
	OTHER					AC =22
	Client Costs	-	\$2,500)		\$2,500
55		-				
56 57	TOTAL Non-DAAS OBEDATING EVPENS	F	\$0 345			\$9,345
-	TOTAL Non-DAAS OPERATING EXPENS	-	\$9,345			φο,υ40
58						
59	TOTAL DAAS & Non-DAAS OPERATING EXP	ENSE	\$113,794			\$113,794
60	HSA #3					1/0/1900

APPENDIX A

OPEN DOOR LEGAL

LEGAL SERVICES FOR OLDER ADULTS

July 1, 2019 - June 30, 2020

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

II. Definitions

California State Bar The State Bar of California is the regulatory agency for the State's

lawyers, charged with admitting and disciplining attorneys.

CARBON Contracts Administration, Reporting, and Billing Online System

DAAS Department of Aging and Adult 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.

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.

Grantee Open Door Legal

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the

extent feasible, counseling or other appropriate assistance by a

paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

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 100% 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.

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.

OAA

Older Americans Act

Older Adult

Person who is 60 years or older, used interchangeably with senior.

Senior

Person who is 60 years or older, used interchangeably with older adult.

SOGI

Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

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- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

Open Door Legal's services at provided at their offices, located at 4634 3rd Street in San Francisco. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

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Consumers can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that effect older adults, particularly in the issue areas in which services are provided. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal Services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service programs.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAAS/OOA legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

VII. Service Objectives

On an annual basis:

- Grantee will serve <u>65</u> unduplicated consumers.
- Grantee will provide <u>2015</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

VIII. Outcome Objectives

Completion and submission of the following reports will be used to measure the amount, range, and impact of services provided.

- 1) Grantee will, on a quarterly basis, complete and submit to the OOA analyst the California Department of Aging (CDA) standardized Legal Services Report (Form 1022) which includes the following:
 - a. Total clients served including aggregate demographic information.
 - b. Total number of cases closed during the quarter.
 - c. Description of module of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
 - d. Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
 - e. Community education, outreach efforts, and client narratives.

The completed form shall be completed and submitted to OOA based on the following deadlines:

- a. 1st Quarter (covering July, August, September 2019) due October 25th, 2019.
- b. 2nd Quarter (covering October, November, December 2019) due January 25th, 2019.

- c. 3rd Quarter (covering January, February, March 2020) due April 25th, 2020.
- d. 4th Quarter (covering April, May, June 2020) due July 25th, 2020.
- 2) Grantee will, on a twice yearly basis, provide a report categorizing each case closed into a series of standardized categories based on the outcome of the closed case (e.g. obtained, preserved, or increased disability or age related benefit to which entitled, prevented loss of current housing, etc.).

Reporting will be completed via a standardized form developed by Office on the Aging staff and provided to Grantee. Report will be submitted by December 31st and June 30th each year and cover the previous 6 month contract period.

Collecting outcomes through this manner will allow DAAS and Grantee to track positive outcomes in a year (and in turn to measure the value of a program) as well as comparing the outcomes from year to year. Results from these outcome reports may help establish benchmarks for performance in future years.

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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 Service Objectives 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 and include Service Objectives.
- C. 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 shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th and shall be submitted via the CARBON system.
- E. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- F. 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.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Grantee will assure that services delivered are consistent with professional standards for this service.

- I. Pursuant to California Department of Aging Requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- J. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 Consumer Grievance Policy.
- K. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults connect to services throughout the City. These Focal Points are:

Designated Community Focal Points							
Name	Phone						
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Bayview Senior Connections	5600 3rd St, San Francisco, 94124	415-647-5353					
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132	415-335-5558					
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121	415-404-2938					
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Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108	415-438-9804					
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Michael Zaugg
Director, Office on the Aging
DAAS
P.O. Box 7988
San Francisco, CA 94120-7988
Michael.Zaugg@sfgov.org

and

Ella Lee Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 Ella.Lee@sfgov.org

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- A. Program Monitoring: Program monitoring will include review of compliance to 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 CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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1				Appendix B, Page 1
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3			NOTE OF SERVICE TO 1	
4	HUMA	N SERVICES AGENCY BUI	OGET SUMMARY	
5		BY PROGRAM		
6				
7	Name		Term	
	pen Door Legal		7/1/19-6/30/20	
9 (Check One)	New 🗸 Renewal Mo	dification		
10 If modification, Eff	ective Date of Mod. No.	of Mod.		
	Services for Older Adults			
12 Budget Reference				
13 Program Term		7/1/19 - 6/30/20		Total
Y				
14		Budget		Budget
15				
16 DAAS Expenditu	res			
17 Salaries & Benefi		\$100,665		\$100,665
18 Operating Expens		\$9,767		\$9,767
19 Subtotal	1000	\$110,432		\$110,432
20 Capital/Subcontra	actor Expenditures			
21 Indirect Percenta		15.00%		15.00%
22 Indirect Cost	90 (70)	\$16,565		\$16,565
27 Total DAAS Exp	anditures	\$126,997		\$126,997
	enatures			
39 40 DAAS Revenues				1
		\$126,997		\$126,997
42				
43				
44				
45		\$126,997		\$126,997
46 Total DAAS Rev	enue	ψ120,001		
47				
48 Non DAAS Reve	nues			
49	NIC LOUIS LOUIS			
50				
51				
52	15	\$126,997		\$126,997
61 TOTAL REVENU) C	φ120,331		7,,
62) /CTE\			-
63 Full Time Equiva	ient (FTE)			
64			1	Date: 5/10/18
65 Prepared by:				Date. W 10/10
66 HSA-CO Review	Signature:		-	
67				6/5/2019
68 HSA #1				6/5/2011

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2								
	Open Door Legal							
	Program: Legal Services for Older Adul	Ite						
		11.5						
5	(Same as Line 11 on HSA #1)						•	
6 7			Salaries	& Benefits Det	ail			
8	•		Odiano					
9		Agency Tot	ale	HSA Progra	am	7/1/19 - 6/30/20		Total
9			413		****			
	,	Annual Full		% FTE funded by	A 15	l [
		TimeSalary for	Total FTE	HSA (Max 100%)	Adjusted FTE	Budget		Budget
	DAAS Salary	FTE	1,00	16.50%	0.17	\$9,900		\$9,900
	Housing Attorney	\$60,000	1.00	21.62%	0.17			\$13,514
	Sr. Family Attorney	\$62,500		29.73%	0.22			\$19,324
	Sr. Consumer Attorney	\$65,000	1.00		0.30			\$18,581
	Elder Law Attorney	\$62,500	1.00	29.73%	0.00	\$1,486		\$1,486
	Employment Attorney	\$55,000	1.00	2.70%		l		\$2,750
	Housing/Family Paralegal	\$55,000	1.00	5.00%	0.05	· · · · · · · · · · · · · · · · · · ·		\$2,500
	Consumer/Elder Law Paralegal	\$50,000	1.00	5,00%	0.05	\$2,500 \$550	····	\$550
	Engagement Associate	\$55,000	1,00	1.00%	0.01	 		\$7,800
19	Elder Law Attorney (to be hired)	\$60,000	1.00	13,00%	0.13			\$8,220
20	Frontline Coordinator	\$47,424	1.00	17.33%	0.17	 		\$3,600
21	Director of Legal Services	\$72,000	1,00	5,00%	0.05	\$3,600		\$3,000
22								
23								
24							ļ	
25								
26								
27								
28						ļ		
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30								
31					,		<u> </u>	
32	Totals	\$644,424	11.00	146.62%	1.47	\$88,225		\$88,225
33]		,				ĺ	1
34	Fringe Benefits Rate	14.10%			13240.0000			
35	Employee Fringe Benefits	\$90,864				\$12,440		\$12,440
Г	1							
36	Total DAAS Salaries and Benefits	\$735,288				\$100,665	<u> </u>	\$100,665
59								
_	HSA #2							6/5/2019

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1						Appendix B, Page 3
2						
	Open Door Legal					
	Program: Legal Services for C	older Adults				
	(Same as Line 11 on HSA #1)					
6	,					
7			Operation	ng Expense Detail		
8				•		
9				7/1/19 - 6/30/20		Total
10				Budget		Budget
11						
	DAAS Operating Expenses					
	Expenditure Category					
	Rental of Property			\$5,794		\$5,794
	Utilities (Elec, Water, Gas, Pho	ne, Garbage))			
	Office Supplies, Postage			\$252		\$252
	Building Maintenance Supplies	and Repair				
	Printing and Reproduction			\$1,721		\$1,721
	Insurance			\$317		\$317
20	Staff Training			\$369		\$369
21	Staff Travel-(Local & Out of Tov	vn)		\$432		\$432
22	Rental of Equipment					
23						
24						
25						
26						
27						
28						
29						
30	Other .					
31	Drafting Software			\$234		\$234
32	Language Translation			\$648		\$648
33						
34						
35	Total DAAS Operating Expens	ses		\$9,767		\$9,767
58 59	HSA #3					6/5/2019

APPENDIX A

UC Hastings College of the Law - Medical Legal Partnership for Seniors LEGAL SERVICES FOR OLDER ADULTS

July 1, 2019 – June 30, 2020

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

Definitions II.

The State Bar of California is the regulatory agency for the State's California State Bar

lawyers, charged with admitting and disciplining attorneys.

Contracts Administration, Reporting, and Billing Online System CARBON

Department of Aging and Adult Services DAAS

A condition or combination of conditions that is attributable to a Disability

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

An individual determined to be functionally impaired in one or Frail

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.

UC Hastings College of the Law – Medical Legal Partnership for Grantee

Seniors

Human Services Agency of City and County of San Francisco HSA

Legal advice and representation provided by an attorney to older Legal Assistance

individuals with economic or social needs; and includes - (i) to the

extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.

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 100% 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.

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.

OAA

Older Americans Act

Older Adult

Person who is 60 years or older, used interchangeably with senior

Senior

Person who is 60 years or older, used interchangeably with older

adult

SOGI

Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

According to the federal mandates of the Older Americans Act, 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. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

UC Hasting College of the Law – Medical Legal Partnership for Seniors' administrative offices are located at 200 McAllister Street in San Francisco and open Monday through Friday during regular business hours. Services are delivered via legal clinics at select hospitals and health clinics as well as home-visits throughout the City.

VI. Description of Services

Legal service providers help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters.

Legal services and interventions are critical to maintaining or securing a better quality of life affecting older adults. Legal service providers often work in conjunction with other service providers to carefully assess and triage consumer needs.

Consumers contacting legal services go through an initial screening process. Legal providers then categorize the services they provide into one of the following four modules:

- 1) <u>Information and Referral</u> the consumer concern is more appropriately referred to another service for assistance
- 2) Advise and Close the consumer issue is very easily addressed, advice is provided and the case is closed
- 3) <u>Brief Services</u> the consumer is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) <u>Case Acceptance</u> the consumer issue warrants more extensive legal representation and a case file is opened, i.e., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) <u>Income/Nutrition</u>: SSI, Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) <u>Long-term Care</u>: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) <u>Healthcare</u>: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) <u>Protective Services/Elder Abuse/Defense against Conservatorship</u>: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Consumers can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that effect older adults, particularly in the issue areas in which services are provided. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal Services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to legal service programs.

VII. Service Objectives

On an annual basis:

- Grantee will serve <u>150</u> unduplicated consumers.
- Grantee will provide <u>1400</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

VIII. Outcome Objectives

Completion and submission of the following reports will be used to measure the amount, range, and impact of services provided.

- 1) Grantee will, on a quarterly basis, complete and submit to the OOA analyst the California Department of Aging (CDA) standardized Legal Services Report (Form 1022) which includes the following:
 - a. Total clients served including aggregate demographic information
 - b. Total number of cases closed during the quarter
 - c. Description of module of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
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and

Ella Lee Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 Ella.Lee@sfgov.org

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D Appendix B, Page 1 2 3 **HUMAN SERVICES AGENCY BUDGET SUMMARY** 4 BY PROGRAM 5 6 Term 7 Name 7/1/19-6/30/20 8 UC Hastings College of the Law New ✓ Renewal ____ Modification ____ 9 (Check One) No. of Mod. 10 If modification, Effective Date of Mod. 11 Program: Legal Services for Older Adults 12 Budget Reference Page No.(s) Total 7/1/19 - 6/30/20 13 Program Term Budget Budget 14 15 16 DAAS Expenditures \$129,498 \$129,498 17 Salaries & Benefits \$4,243 \$4,243 18 Operating Expenses \$133,741 \$133,741 19 Subtotal 20 Capital/Subcontractor Expenditures 12.00% 12.00% 21 Indirect Percentage (%) \$16,049 \$16,049 22 Indirect Cost \$149,790 27 Total DAAS Expenditures \$149,790 29 Non DAAS Expenditures \$34,149 \$34,149 30 Salaries & Benefits \$27,300 \$27,300 31 Operating Expenses \$61,449 \$61,449 32 Subtotal 33 Capital/Subcontractor Expenditures 34 Indirect Percentage (%) 35 Indirect Cost \$61,449 36 Total Non DAAS Expenditures \$61,449 37 \$211,239 38 TOTAL DAAS AND NON DAAS EXPEDITURES \$211,239 39 40 DAAS Revenues \$149,790 \$149,790 41 General Fund 42 43 44 \$149,790 \$149,790 45 Total DAAS Revenue 46 47 Non DAAS Revenues 48 49 \$149,790 57 TOTAL REVENUE \$149,790 59 Full Time Equivalent (FTE) Date: 5/10/18 61 Prepared by: 62 HSA-CO Review Signature: 63 6/5/2019 64 HSA #1

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3 UC Hastings College of the Law							
4 Program: Legal Services for Older Ad	lults						
5 (Same as Line 11 on HSA #1)							
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9	Agency Tot	als	HSA Progra	am	7/1/19 - 6/30/20		Total
	Annual Full		% FTE funded by				
	TimeSalary for	Total	HSA	Adjusted	n Dudwet	ŀ	Durdont
10 DAAS Salary	FTE	FTE	(Max 100%)	FTE	Budget		Budget \$80,000
11 Managing Attorney	\$80,000	1.00	100.00%	1.00	\$80,000		\$16,640
12 Legal interns	\$41,600	1.00	40.00%	0.40	\$16,640		क । ०,०५७
13							
14							
15							
16							
17 18							
19							***************************************
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21							
22							
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24		***					
25							
26							
27							
28 Totals	\$121,600	2,00	140,00%	1.40	\$96,640		\$96,640
29							
30 Fringe Benefits Rate	34.00%	· .		Manager Rosen Consultation			
31 Employee Fringe Benefits	\$41,344				\$32,858		\$32,858
32 Total DAAS Salaries and Benefits	\$162,944				\$129,498		\$129,498
52				·			
53 HSA #2							6/5/201

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1	· · · · · · · · · · · · · · · · · · ·					Appendix B, Page 3
2						
	UC Hastings College of the La	·w				
	Program: Legal Services for C					
5	(Same as Line 11 on HSA #1)					
6	,					
7				Operating Expense De	tail	
8	·					
9				7/1/19 - 6/30/20		Total
10				Budget		Budget
11						
12	DAAS Operating Expenses					
13	Expenditure Category					
14	Rental of Property					
15	Utilities (Elec, Water, Gas, Pho	ne, Garbage)				
16	Office Supplies, Postage			\$1,335		\$1,335
17	Building Maintenance Supplies	and Repair	1			
	Printing and Reproduction			\$930		\$930
19	Insurance			\$193_		\$193
20	Staff Training			\$185		\$185
21	Staff Travel-(Local & Out of Tov	งก)		\$1,180		\$1,180
22	Rental of Equipment					
23						
24						
25						
26						
27			•			
28						
	<u>Other</u>					
	State Bar Membership Fee			\$420		\$420
31		м				
32						\$4,243
	Total DAAS Operating Expens	ses		\$4,243		\$4,243
56						_,,,,,,,,,
57	HSA #3					6/5/2019