



London Breed, Mayor

Department of Benefits and Family Support
 Department of Disability and Aging Services
 Office of Early Care and Education

Trent Rhorer, Executive Director

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

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

DATE: DECEMBER 2, 2020

SUBJECT: **NEW GRANT: MULTIPLE GRANTEES (NON-PROFIT) FOR THE PROVISION OF COMMUNITY SERVICES FOR OLDER ADULTS AND ADULTS WITH DISABILITIES (see table below)**

js for E2

	Current	Renewal	Contingency	Total	
GRANT TERM:	7/1/18 - 12/31/20	1/1/21 - 6/30/23		1/1/21 - 6/30/23	
GRANT AMOUNT:	\$20,253,118	\$21,959,727	\$2,195,976	\$24,155,703	
Funding source:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
Annual amount:	\$19,324,560		\$2,635,167	\$2,195,976	\$24,155,703
Percentage:	88%	0%	12%		100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with multiple providers for the provision of Community Services to older adults and adults with disabilities for the time period beginning January 1, 2021 and ending June 30, 2023 in the combined amount of \$21,959,727, plus a 10% contingency for a total not to exceed amount of \$24,155,703. The specific breakdown of funding per grantee is summarized in the following table.

Agency	1/1/21 – 6/30/21 grant amount	FY 21/22, FY 22/23 annual amount	Grant total	10% contingency	Not-To-Exceed amount
Bayanihan Equity Center	\$200,250	\$400,500 annually \$801,000	\$1,001,250	\$100,125	\$1,101,375
Bayview Senior Services (BHPMSS) Dr. Davis Senior Center	\$532,308	\$1,064,616 annually \$2,129,236	\$2,661,544	\$266,154	\$2,927,698
Bayview Senior Services Rosa Park Senior Center	\$169,394	\$338,788 annually \$677,576	\$846,970	\$84,697	\$931,667
Bayview Senior Services Western Addition Senior Center	\$168,531	\$337,062 annually \$674,124	\$842,655	\$84,266	\$926,921
Bernal Heights Neighborhood Center Cortland	\$118,803	\$237,606 annually \$475,212	\$594,015	\$59,402	\$653,417
Bernal Heights Neighborhood Center Excelsior	\$202,362	\$304,723 annually \$609,450	\$811,812	\$81,181	\$892,993
Catholic Charities	\$422,086	\$589,717 annually \$1,079,454	\$1,501,540	\$150,154	\$1,651,694
Centro Latino de San Francisco, Inc.	\$57,884	\$115,768 annually \$231,536	\$289,420	\$28,942	\$318,362
Curry Senior Center	\$180,506	\$361,012 annually \$722,022	\$902,528	\$90,253	\$992,781
Episcopal Community Services	\$129,662	\$259,325 annually \$518,646	\$648,308	\$64,831	\$713,139
Felton Institute	\$81,813	\$163,626 annually \$327,250	\$409,063	\$40,906	\$449,969
Golden Gate Senior Services Castro Senior Center	\$103,539	\$198,137 annually \$396,674	\$500,213	\$50,021	\$550,234

Agency	1/1/21 – 6/30/21 grant amount	FY 21/22, FY 22/23 annual amount	Grant total	10% contingency	Not-To-Exceed amount
Golden Gate Senior Services Richmond Senior Center	\$198,385	\$345,550 annually \$629,130	\$827,515	\$82,752	\$910,267
Independent Living Resource Center of San Francisco	\$59,707	\$198,414 annually \$238,828	\$298,535	\$29,854	\$328,389
Kimochi, Inc.	\$140,560	\$281,150 annually \$436,372	\$576,932	\$57,693	\$634,625
Lighthouse for the Blind and Visually Impaired	\$55,041	\$167,068 annually \$220,162	\$275,203	\$27,520	\$302,723
Mission Neighborhood Center	\$215,669	\$651,310 annually \$862,676	\$1,078,345	\$107,835	\$1,186,180
On Lok Day Services/30 th Street Senior Center	\$221,015	\$613,599 annually \$826,798	\$1,047,813	\$104,781	\$1,152,594
Openhouse	\$186,176	\$357,551 annually \$544,702	\$730,878	\$73,088	\$803,966
Russian American Community Services	\$47,980	\$165,509 annually \$191,918	\$239,898	\$23,990	\$263,888
Self-Help for the Elderly	\$575,333	\$814,211 annually \$1,608,540	\$2,183,873	\$218,387	\$2,402,260
Sequoia Living Aquatic Park Senior Center	\$241,985	\$324,538 annually \$649,136	\$891,121	\$89,112	\$980,233
Sequoia Living Downtown Senior Center	\$156,104	\$398,207 FY 21/22 \$554,414 FY 22/23	\$710,518	\$71,052	\$781,570
Southwest Community Corporation	\$230,114	\$270,150 annually \$520,454	\$750,568	\$75,057	\$825,625

Agency	1/1/21 – 6/30/21 grant amount	FY 21/22, FY 22/23 annual amount	Grant total	10% contingency	Not-To-Exceed amount
YMCA of San Francisco Chinatown	\$21,643	\$43,186 annually \$86,572	\$108,215	\$10,822	\$119,037
YMCA of San Francisco Mission	\$46,832	\$93,664 annually \$187,328	\$234,160	\$23,416	\$257,576
YMCA of San Francisco Parkmerced	\$38,625	\$77,250 annually \$154,500	\$193,125	\$19,313	\$212,438
YMCA of San Francisco Richmond	\$39,487	\$78,974 annually \$157,948	\$197,435	\$19,744	\$217,179
YMCA of San Francisco Stonestown	\$148,189	\$296,378 annually \$458,086	\$606,275	\$60,628	\$666,903
Total	\$4,989,983	\$16,969,744	\$21,959,727	\$2,195,976	\$24,155,703

Background

DAS funded Community Services programs can be most easily identified as the network of Community Centers located throughout the City of San Francisco. These Community Centers are home to the rich history of San Francisco and have been built and nurtured over the years with direct input, insight, and support from the people and neighborhoods they serve.

These Community Centers are more than just a meeting place for older adults and adults with disabilities. Program and activity offerings at DAS funded Community Centers are designed to engage with the community around them while enhancing the cultural, educational, mental, and physical well-being of participants. Community Centers are also the entry point for many older adults and adults with disabilities in need of information and support services, thus translation and social services are made available on site. Additional DAS funded services, including nutrition, health promotion, and digital literacy programs are often co-located at DAS funded Community Centers.

The coronavirus pandemic and subsequent shelter-in-place order starting in March 2020 brought significant disruption to both the operations of DAS funded Community Centers and the lives of the thousands of clients who rely on these Centers for programs and services. Most services were suspended or severely curtailed from their pre-COVID model of operation; all services needed to modify or reimagine their delivery model to ensure safety of staff and clients. DAS Community Centers demonstrated their commitment to the communities they serve through rapid adaptation and innovation. Many programs and staff moved to phone or virtual delivery of services while to-go or delivery of meals and groceries became standard. Placement of physical barriers, use of personal protective equipment, and strict occupancy requirements have allowed for limited one-to-one services where critical.

Evolving guidance on COVID safety practices, approval and distribution of a COVID vaccine, and continued efforts towards digital literacy and accessibility all provide hope for the future as these Community Centers work to return to expanded engagement, providing support and resources for older adults and adults with disabilities.

Services to be provided

Grantees will operate a Community Center space designed to engage with the surrounding community which will be welcoming and accessible for older adults and adults with disabilities. Each grantee will offer a variety of activities and services designed to maintain or improve the quality of life of program participants. Activities and services shall consider the physical, social, psychological, economic, educational, recreational, and/or creative needs of participants. While the Community Center may serve as a hub for operations, services may take place in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

For reporting purposes, delivery of DAS funded Community Services are categorized into four groups:

- 1) Activity Scheduling – educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that helps participants maintain or enhance their level of functioning.
- 2) Translation –translation assistance provided to consumers that cannot speak/read English. Services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
- 3) Social Services – providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service such as safety issues or transportation needs.

Impact of program services are measured primarily through the administration of client surveys. Surveys seek feedback on whether services offered met the needs of clients, if services improved physical health, and if services created opportunities for socialization and interaction with others. Results from these surveys are shared with contractors and are used to inform program design and types of services offered.

Adult Day Programs / Alzheimers Day Care Resource Centers

Adult Day Programs (ADP) and Alzheimers Day Care Resource Centers (ADCRC) serve an important role in the spectrum of DAS funded services supporting older adults and adults with disabilities. These two programs offer congregate daytime services in a structured and protective environment. Services for attendees are designed to engage participants mentally, socially, and physically in order to encourage maintenance of functioning level and ability to live in the community. These two programs also serve as a source of respite and information and resources for caregivers of participants. The City's shelter-in-place order in March 2020 restricted on site attendance and participation in these programs. In spite of these restrictions, these programs have not stopped functioning, their staff have instead shifted to phone and virtual means to best continue to support the purpose of these programs.

ADP and ADCRC program models have historically been contracted for as independent program models in standalone ADP or ADCRC contracts. In-person services were community based, but

at locations distinct from DAS funded Community Centers. The COVID-19 pandemic has created uncertainty around the function of these programs in their 'original' program model design which has forced DAS to pause, for the near term, any new procurement of the original program model. (Re-procurement had been originally planned for Spring 2020). The current operations of DAS ADP and ADCRC services track to the type of services being provided through our Community Services programs described above. As a result, DAS will be including three of the four current ADP/ADCRC grantees in this group of Community Services contracts. This inclusion will cover the six month period of January 1, 2021 to June 30, 2021. It is believed that this six month period will provide some insight into the future of these programs and allow DAS to re-procure ADP and ADCRC contracts in that window. Contractors/programs included with these Community Services grants are as follows: Catholic Charities (ADP, ADCRC), Kimochi, Inc. (ADP), and Self-Help for the Elderly (ADP, ADCRC). A fourth grantee, Institute on Aging (ADP, ADCRC), will be supported via a separate contracting action.

Performance

DAS Grantees receive regular program and fiscal monitoring to ensure program performance. Current monitoring results for Community Services Grantees are as follows:

- **Bayanihan Equity Center**
 - Program Monitoring – August 2020, compliant with no findings.
 - Fiscal and Compliance Monitoring – FY 18/19, compliant.
- **Bayview Senior Services (BHPMSS):** Dr. Davis Senior Center, Rosa Parks Senior Center, Western Addition Senior Center
 - Program Monitoring – August 2020, compliant with no findings.
 - Fiscal and Compliance Monitoring – FY 19/20, compliant.
- **Bernal Heights Neighborhood Center:** Cortland, Excelsior
 - Program Monitoring – August 2020, compliant with no findings.
 - Fiscal and Compliance Monitoring – FY 19/20, waived.
- **Catholic Charities of San Francisco**
 - Program Monitoring – August 2020, compliant with no findings.
 - Fiscal and Compliance Monitoring – FY 19/20, waived.
- **Centro Latino de San Francisco, Inc.**
 - Program Monitoring – August 2020, compliant with no findings.
 - Fiscal and Compliance Monitoring – FY 19/20, compliant.
- **Curry Senior Center**
 - Program Monitoring – September 2020, compliant with no findings.
 - Fiscal and Compliance Monitoring – FY 18/19, waived.

- **Episcopal Community Services**
 Program Monitoring – September 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 18/19, waived.
- **Felton Institute**
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 18/19, compliant.
- **Golden Gate Senior Services: Castro Senior Center, Richmond Senior Center**
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 18/19, compliant.
- **Independent Living Resource Center of San Francisco**
 Program Monitoring – September 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 19/20, compliant.
- **Kimochi, Inc.**
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 18/19, compliant.
- **Lighthouse for the Blind and Visually Impaired**
 Program Monitoring – August 2020, compliant with findings resolved.
 Fiscal and Compliance Monitoring – FY 19/20, waived.
- **Mission Neighborhood Centers**
 Program Monitoring – September 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 19/20, waived.
- **On Lok Day Services / 30th Street Senior Center**
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 18/19, compliant.
- **Openhouse**
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 19/20, compliant.
- **Russian American Community Services**
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 18/19, compliant.
- **Self-Help for the Elderly**
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 19/20, compliant.

- **Sequoia Living:** Aquatic Park Senior Center, Downtown Senior Center
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 19/20, waived.
- **Southwest Community Corporation**
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 18/19, compliant.
- **YMCA of San Francisco:** Chinatown, Mission, Parkmerced, Richmond, Stonestown
 Program Monitoring – August 2020, compliant with no findings.
 Fiscal and Compliance Monitoring – FY 19/20, waived.

Selection

Grantees were selected through Request for Proposals (RFP) #785, which was issued in February 2018.

Funding

These grants will be funded by local County General Funds.

ATTACHMENTS

- **Bayanihan Equity Center**
 Appendix A – Services to be provided
 Appendix B – Budget
- **Bayview Senior Services (BHPMSS)**
 Dr. Davis Senior Center
 Appendix A – Services to be provided
 Appendix B – Budget
 Rosa Parks Senior Center
 Appendix A – Services to be provided
 Appendix B – Budget
 Western Addition Senior Center
 Appendix A – Services to be provided
 Appendix B – Budget

- **Bernal Heights Neighborhood Center**

Cortland

Appendix A – Services to be provided

Appendix B – Budget

Excelsior

Appendix A – Services to be provided

Appendix B – Budget

- **Catholic Charities of San Francisco**

Appendix A – Services to be provided

Appendix B – Budget

- **Centro Latino de San Francisco, Inc.**

Appendix A – Services to be provided

Appendix B – Budget

- **Curry Senior Center**

Appendix A – Services to be provided

Appendix B – Budget

- **Episcopal Community Services**

Appendix A – Services to be provided

Appendix B – Budget

- **Felton Institute**

Appendix A – Services to be provided

Appendix B – Budget

- **Golden Gate Senior Services**

Castro Senior Center

Appendix A – Services to be provided

Appendix B – Budget

Richmond Senior Center

Appendix A – Services to be provided

Appendix B – Budget

- **Independent Living Resource Center of San Francisco**

Appendix A – Services to be provided

Appendix B – Budget

- **Kimochi, Inc.**
 - Appendix A – Services to be provided
 - Appendix B – Budget
- **Lighthouse for the Blind and Visually Impaired**
 - Appendix A – Services to be provided
 - Appendix B – Budget
- **Mission Neighborhood Centers**
 - Appendix A – Services to be provided
 - Appendix B – Budget
- **On Lok Day Services / 30th Street Senior Center**
 - Appendix A – Services to be provided
 - Appendix B – Budget
- **Openhouse**
 - Appendix A – Services to be provided
 - Appendix B – Budget
- **Russian American Community Services**
 - Appendix A – Services to be provided
 - Appendix B – Budget
- **Self-Help for the Elderly**
 - Appendix A – Services to be provided
 - Appendix B – Budget
- **Sequoia Living**
 - Aquatic Park Senior Center
 - Appendix A – Services to be provided
 - Appendix B – Budget
 - Downtown Senior Center
 - Appendix A – Services to be provided
 - Appendix B – Budget
- **Southwest Community Corporation**
 - Appendix A – Services to be provided
 - Appendix B – Budget

- **YMCA of San Francisco**

Chinatown

Appendix A – Services to be provided

Appendix B – Budget

Mission

Appendix A – Services to be provided

Appendix B – Budget

Parkmerced

Appendix A – Services to be provided

Appendix B – Budget

Richmond

Appendix A – Services to be provided

Appendix B – Budget

Stonestown

Appendix A – Services to be provided

Appendix B – Budget

APPENDIX A – SERVICES TO BE PROVIDED

BAYANIHAN EQUITY CENTER

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Bayanihan Equity Center

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Grantee will participate in multiple neighborhood organizing groups including SOMA Pilipinas Neighborhood Services and the SOMA Coordinating Committee. These groups focus on issues and seek solutions related to the immediate neighborhood including access to affordable and low-income housing, overcoming barriers to services, and inclusivity and representation of older adults and adults with disabilities in program services. These groups also coordinate and staff neighborhood events and celebrations.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or

health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve **288** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **2,025** units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide **750** units of service of translation.
- Grantee will provide **1,500** units of service of social services.
- Grantee will provide **88** units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve **450** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **4,050** units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide **1,500** units of service of translation.
- Grantee will provide **3,000** units of service of social services.
- Grantee will provide **145** units of service of enhanced outreach.

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve **450** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **5,400** units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide **1,500** units of service of translation.
- Grantee will provide **3,000** units of service of social services.

- Grantee will provide 145 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data

collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

Or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5597
Patrick.Gracia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name BAYANIHAN EQUITY CENTER		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 06/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$174,857	\$349,714	\$349,714	\$874,285
Operating Expenses	\$25,393	\$50,786	\$50,786	\$126,965
Subtotal	\$200,250	\$400,500	\$400,500	\$1,001,250
Indirect Percentage (%)				
Indirect Cost				
Subcontractor/Capital Expenditure				
Total Expenditures	\$200,250	\$400,500	\$400,500	\$1,001,250
HSA Revenues				
General Fund	\$200,250	\$400,500	\$400,500	\$1,001,250
Total HSA Revenue	\$200,250	\$400,500	\$400,500	\$1,001,250
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$200,250	\$400,500	\$400,500	\$1,001,250
Full Time Equivalent (FTE) _____				
Prepared by: _____		Telephone No.: _____		Date: 11/19/20
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 06/30/22	7/1/22 - 6/30/23	Total
Executive Director	\$70,000	1.00	60.00%	0.60	\$21,000	\$42,000	\$42,000	\$105,000
Community Service Worker	\$40,080	1.00	100.00%	1.00	\$20,040	\$40,080	\$40,080	\$100,200
Community Service Worker	\$40,080	1.00	100.00%	1.00	\$20,040	\$40,080	\$40,080	\$100,200
Community Service Worker	\$40,080	1.00	100.00%	1.00	\$20,040	\$40,080	\$40,080	\$100,200
Community Service Worker	\$42,000	1.00	100.00%	1.00	\$21,000	\$42,000	\$42,000	\$105,000
Community Service Worker	\$40,080	1.00	100.00%	1.00	\$20,040	\$40,080	\$40,080	\$100,200
Data Collection Specialist	\$50,000	1.00	80.00%	0.80	\$20,000	\$40,000	\$40,000	\$100,000
Totals	\$322,320	7.00	640.00%	6.40	\$142,160	\$284,320	\$284,320	\$710,800
Fringe Benefits Rate	23.00%							
Employee Fringe Benefits	\$74,134				\$32,697	\$65,394	\$65,394	\$163,485
Total Salaries and Benefits	\$396,454				\$174,857	\$349,714	\$349,714	\$874,285
HSA #2	10/25/2016							

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 06/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property	\$3,248	\$3,313	\$3,379	\$9,940
Utilities (Elec, Water, Gas, Phone, Garbage)	\$4,050	\$6,840	\$6,840	\$17,730
Office Supplies, Postage	\$4,000	\$1,017	\$783	\$5,800
Building Maintenance Supplies and Repair				
Printing and Reproduction	\$600	\$500	\$500	\$1,600
Insurance	\$1,120	\$7,700	\$7,700	\$16,520
Staff Training				
Staff Travel-(Local & Out of Town)	\$2,933	\$8,232	\$8,400	\$19,565
Rental of Equipment	\$1,150	\$4,100	\$4,100	\$9,350
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Bookkeeping	\$2,500	\$6,000	\$6,000	\$14,500
Audit		\$9,000	\$9,000	\$18,000
Payroll Processing	\$1,542	\$3,084	\$3,084	\$7,710
Seniors Activity	\$750	\$1,000	\$1,000	\$2,750
CAM Fee	\$1,500			\$1,500
Gift Cards for Volunteers	\$2,000			\$2,000
Total Operating Expenses	\$25,393	\$50,786	\$50,786	\$126,965
HSA #3				10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

Bayview Senior Services: Dr. Davis Center

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Bayview Senior Services

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 221 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 525 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 60 units of service of translation.
- Grantee will provide 368 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 664 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1575 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 180 units of service of translation.
- Grantee will provide 1104 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve 885 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 2100 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 240 units of service of translation.
- Grantee will provide 1472 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Richard Appleby
 Program Analyst
 P.O. Box 7988
 San Francisco, CA 94120
 (415) 355-3644
 Rick.appleby@sfgov.org

or

Steve Kim
 Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 (415) 557-6335
 Steve.kim@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name BHPMSS	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services-Dr. Davis Center				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$373,240	\$746,480	\$746,480	\$1,866,200
Operating Expenses	\$76,587	\$153,174	\$153,174	\$382,935
Subtotal	\$449,827	\$899,654	\$899,654	\$2,249,135
Indirect Percentage (%)	11.00%	11.00%	11.00%	11.00%
Indirect Cost	\$49,481	\$98,964	\$98,964	\$247,409
Subcontractor/Capital Expenditure	\$33,000	\$66,000	\$66,000	\$165,000
Total Expenditures	\$532,308	\$1,064,618	\$1,064,618	\$2,661,544
HSA Revenues				
General Fund	\$532,308	\$1,064,618	\$1,064,618	\$2,661,544
Total HSA Revenue	\$532,308	\$1,064,618	\$1,064,618	\$2,661,544
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$532,308	\$1,064,618	\$1,064,618	\$2,661,544
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 5/10/18	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Program Coord.	\$64,464	1.00	100.00%	1.00	\$32,232	\$64,464	\$64,464	\$161,160
Activity/Resource Coord	\$39,520	0.63	100.00%	0.63	\$12,350	\$24,700	\$24,700	\$61,750
Translation/Social Services	\$40,560	0.50	100.00%	0.50	\$10,140	\$20,280	\$20,280	\$50,700
Custodian	\$37,440	1.00	100.00%	1.00	\$18,720	\$37,440	\$37,440	\$93,600
Custodian-Weekend/Evening	\$37,440	0.50	100.00%	0.50	\$9,360	\$18,720	\$18,720	\$46,800
Director of Administration	\$96,360	0.60	100.00%	0.60	\$28,908	\$57,816	\$57,816	\$144,540
Administration Assistant	\$56,160	0.60	100.00%	0.60	\$16,848	\$33,696	\$33,696	\$84,240
Front Desk Manager	\$53,560	1.00	100.00%	1.00	\$26,780	\$53,560	\$53,560	\$133,900
Volunteer Coord.	\$44,976	1.00	100.00%	1.00	\$22,488	\$44,976	\$44,976	\$112,440
Program Assistant	\$37,440	1.00	100.00%	1.00	\$18,720	\$37,440	\$37,440	\$93,600
Program Dir for Wellness	\$60,312	1.00	100.00%	1.00	\$30,156	\$60,312	\$60,312	\$150,780
Program Coord.-Wellness	\$41,600	0.40	100.00%	0.40	\$8,320	\$16,640	\$16,640	\$41,600
Program Coord.-Wellness	\$41,600	0.40	100.00%	0.40	\$8,320	\$16,640	\$16,640	\$41,600
Program Coord.-Wellness	\$41,600	0.40	100.00%	0.40	\$8,320	\$16,640	\$16,640	\$41,600
Program Coord.-Wellness	\$41,600	0.40	100.00%	0.40	\$8,320	\$16,640	\$16,640	\$41,600
Social Service Coord.	\$47,840	1.00	100.00%	1.00	\$23,920	\$47,840	\$47,840	\$119,600
SEOP Director	\$78,000	0.25	100.00%	0.25	\$9,750	\$19,500	\$19,500	\$48,750
Office Assistant	\$39,520	0.25	100.00%	0.25	\$4,940	\$9,880	\$9,880	\$24,700
Totals	\$899,992	11.93	1800.00%	11.93	\$298,592	\$597,184	\$597,184	\$1,492,960
Fringe Benefits Rate	25.00%							
Employee Fringe Benefits	\$224,998				\$74,648	\$149,296	\$149,296	\$373,240
Total Salaries and Benefits	\$1,124,990				\$373,240	\$746,480	\$746,480	\$1,866,200

HSA #2

10/25/2016

Program: Community Services-Dr. Davis Center
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property	\$375	\$750	\$750	\$1,875
Utilities (Elec, Water, Gas, Phone, Garbage)	\$22,080	\$44,160	\$44,160	\$110,400
Office Supplies, Postage	\$7,000	\$14,000	\$14,000	\$35,000
Building Maintenance Supplies and Repair	\$12,000	\$24,000	\$24,000	\$60,000
Printing and Reproduction	\$1,800	\$3,600	\$3,600	\$9,000
Insurance	\$6,747	\$13,494	\$13,494	\$33,735
Staff Training	\$600	\$1,200	\$1,200	\$3,000
Staff Travel-(Local & Out of Town)	\$100	\$200	\$200	\$500
Rental of Equipment	\$1,800	\$3,600	\$3,600	\$9,000
<u>Consultant</u>				
Wellness Classes Contractor	\$12,000	\$24,000	\$24,000	\$60,000
Computer/Network Support	\$1,500	\$3,000	\$3,000	\$7,500
<u>Other</u>				
Program Supplies	\$10,585	\$21,170	\$21,170	\$52,925
Total Operating Expenses	\$76,587	\$153,174	\$153,174	\$382,935
HSA #3				10/25/2016

Subcontractor & Capital Expenditure Detail

<u>Subcontractor Expenditure</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Network for Elders Senior Empowerment	\$6,000	\$12,000	\$12,000	\$30,000
Somoan Community Development	\$27,000	\$54,000	\$54,000	\$135,000
Total Subcontractor Expenditure	\$33,000	\$66,000	\$66,000	\$165,000
<u>Equipment (Qty)</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Equipment A				
Total Equipment Cost				
<u>Remodeling</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Remodel A				
Total Remodeling Cost				
Total Capital Expenditure	\$33,000	\$66,000	\$66,000	\$165,000

HSA #4

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

Bayview Senior Services: Rosa Parks

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Bayview Senior Services

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Grantee conducts regular “Road Shows” which are off-site demonstrations of services offered by Grantee. “Road Shows” target sites such as senior housing and other community spaces where Grantee would like to raise awareness of services offered.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 75 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 420 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 0 units of service of translation.
- Grantee will provide 225 units of service of social services.
- Grantee will provide 40 units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 225 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1260 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 0 units of service of translation.
- Grantee will provide 675 units of service of social services.
- Grantee will provide 120 units of service of enhanced outreach.

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve 300 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1680 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 0 units of service of translation.
- Grantee will provide 900 units of service of social services.
- Grantee will provide 160 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Richard Appleby
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3644
Analyst.Email@sfgov.org

or

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) Manager Phone
Steve.kim@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name BHPMSS	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services-Rosa Park				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$136,718	\$273,435	\$273,435	\$683,588
Operating Expenses	\$15,890	\$31,780	\$31,780	\$79,450
Subtotal	\$152,608	\$305,215	\$305,215	\$763,038
Indirect Percentage (%)	11.00%	11.00%	11.00%	11.00%
Indirect Cost	\$16,786	\$33,573	\$33,573	\$83,932
Subcontractor/Capital Expenditure				
Total Expenditures	\$169,394	\$338,788	\$338,788	\$846,970
HSA Revenues				
General Fund	\$103,894	\$207,788	\$207,788	\$519,470
OTO	\$65,500	\$131,000	\$131,000	\$327,500
Total HSA Revenue	\$169,394	\$338,788	\$338,788	\$846,970
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$169,394	\$338,788	\$338,788	\$846,970
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 5/10/18	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	
Program Director	\$59,280	1.00	100.00%	1.00	\$29,640	\$59,280	\$59,280	\$148,200
Activity Coord	\$41,600	1.00	100.00%	1.00	\$20,800	\$41,600	\$41,600	\$104,000
Director Administration	\$96,360	0.10	100.00%	0.10	\$4,818	\$9,636	\$9,636	\$24,090
Admin Assistant	\$56,160	0.20	100.00%	0.20	\$5,616	\$11,232	\$11,232	\$28,080
Translation	\$40,560	0.40	100.00%	0.40	\$8,112	\$16,224	\$16,224	\$40,560
Janitor	\$37,440	1.00	100.00%	1.00	\$18,720	\$37,440	\$37,440	\$93,600
Front Desk	\$41,600	1.00	100.00%	1.00	\$20,800	\$41,600	\$41,600	\$104,000
Totals	\$373,000	4.70	700.00%	4.70	\$108,506	\$217,012	\$217,012	\$542,530
Fringe Benefits Rate	26.00%							
Employee Fringe Benefits	\$96,980				\$28,212	\$56,423	\$56,423	\$141,058
Total Salaries and Benefits	\$469,980				\$136,718	\$273,435	\$273,435	\$683,588
HSA #2								10/25/2016

Program: Community Services-Rosa Park
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)	\$7,430	\$14,860	\$14,860	\$37,150
Office Supplies, Postage	\$400	\$800	\$800	\$2,000
Building Maintenance Supplies and Repair	\$1,200	\$2,400	\$2,400	\$6,000
Printing and Reproduction				
Insurance	\$2,777	\$5,554	\$5,554	\$13,885
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment	\$1,800	\$3,600	\$3,600	\$9,000
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Program Supplies	\$2,283	\$4,566	\$4,566	\$11,415
Total Operating Expenses	\$15,890	\$31,780	\$31,780	\$79,450
HSA #3				10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

Bayview Senior Services: Western Addition

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Bayview Senior Services

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 137 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 450 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 75 units of service of translation.
- Grantee will provide 260 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 411 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1350 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 225 units of service of translation.
- Grantee will provide 780 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve 548 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1800 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 300 units of service of translation.
- Grantee will provide 1040 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1

– June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Rick Appleby
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3644
Rick.appleby@sfgov.org

or

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6335
Steve.kim@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name BHPMSS	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services-WASC				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$132,328	\$264,655	\$264,655	\$661,638
Operating Expenses	\$19,502	\$39,004	\$39,004	\$97,510
Subtotal	\$151,830	\$303,659	\$303,659	\$759,148
Indirect Percentage (%)	11.00%	11.00%	11.00%	11.00%
Indirect Cost	\$16,701	\$33,403	\$33,403	\$83,507
Subcontractor/Capital Expenditure				
Total Expenditures	\$168,531	\$337,062	\$337,062	\$842,655
HSA Revenues				
General Fund	\$102,531	\$205,062	\$205,062	\$512,655
OTO	\$66,000	\$132,000	\$132,000	\$330,000
Total HSA Revenue	\$168,531	\$337,062	\$337,062	\$842,655
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$168,531	\$337,062	\$337,062	\$842,655
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 5/10/18	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Program Director	\$59,280	1.00	100.00%	1.00	\$29,640	\$59,280	\$59,280	\$148,200
Activity Coord	\$44,720	1.00	100.00%	1.00	\$22,360	\$44,720	\$44,720	\$111,800
Director Administration	\$96,360	0.10	100.00%	0.10	\$4,818	\$9,636	\$9,636	\$24,090
Admin Assistant	\$56,160	0.20	100.00%	0.20	\$5,616	\$11,232	\$11,232	\$28,080
Translation	\$40,560	0.10	100.00%	0.10	\$2,028	\$4,056	\$4,056	\$10,140
Janitor	\$39,520	1.00	100.00%	1.00	\$19,760	\$39,520	\$39,520	\$98,800
Front Desk	\$41,600	1.00	100.00%	1.00	\$20,800	\$41,600	\$41,600	\$104,000
Totals	\$378,200	4.40	700.00%	4.40	\$105,022	\$210,044	\$210,044	\$525,110
Fringe Benefits Rate	26.00%							
Employee Fringe Benefits	\$98,332				\$27,306	\$54,611	\$54,611	\$136,528
Total Salaries and Benefits	\$476,532				\$132,328	\$264,655	\$264,655	\$661,638
HSA #2								10/25/2016

Program: Community Services-WASC
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property	\$3,600	\$7,200	\$7,200	\$18,000
Utilities (Elec, Water, Gas, Phone, Garbage)	\$7,705	\$15,410	\$15,410	\$38,525
Office Supplies, Postage	\$400	\$800	\$800	\$2,000
Building Maintenance Supplies and Repair	\$1,000	\$2,000	\$2,000	\$5,000
Printing and Reproduction				
Insurance	\$2,777	\$5,554	\$5,554	\$13,885
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment	\$1,800	\$3,600	\$3,600	\$9,000
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Program Supplies	\$2,220	\$4,440	\$4,440	\$11,100
Total Operating Expenses	\$19,502	\$39,004	\$39,004	\$97,510

HSA #3

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

BERNAL HEIGHTS NEIGHBORHOOD CENTER - CORTLAND LOCATION

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Bernal Heights Neighborhood Center

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 213 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,400 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 500 units of service of translation.
- Grantee will provide 1,250 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 425 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 2,800 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 1,000 units of service of translation.
- Grantee will provide 2,500 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

or

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6335
Steve.Kim@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name Bernal Heights Neighborhood Center	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services - Cortland				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$82,126	\$164,251	\$164,251	\$410,628
Operating Expenses	\$21,181	\$42,363	\$42,363	\$105,907
Subtotal	\$103,307	\$206,614	\$206,614	\$516,535
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$15,496	\$30,992	\$30,992	\$77,480
Subcontractor/Capital Expenditure				
Total Expenditures	\$118,803	\$237,606	\$237,606	\$594,015
HSA Revenues				
General Fund	\$118,803	\$237,606	\$237,606	\$594,015
Total HSA Revenue	\$118,803	\$237,606	\$237,606	\$594,015
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$118,803	\$237,606	\$237,606	\$594,015
Full Time Equivalent (FTE) _____				
Prepared by: Pura Nagrampa	Telephone No.: 415-206-2140	Date: 11/18/2020		
HSA-CO Review Signature: _____				
HSA #1				11/18/2020

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Director of Programs	\$80,000	1.00	100.00%	0.12	\$4,800	\$9,600	\$9,600	\$24,000
Senior Services Supervisor	\$52,000	1.00	100.00%	1.00	\$26,000	\$52,000	\$52,000	\$130,000
Social Services/Volunteer Coordi	\$47,840	1.00	100.00%	1.00	\$23,920	\$47,840	\$47,840	\$119,600
Exercise Instructor	\$124,800	1.00	100.00%	0.03	\$1,560	\$3,120	\$3,120	\$7,800
Exercise Instructor	\$52,000	1.00	100.00%	0.05	\$1,300	\$2,600	\$2,600	\$6,500
Ass. Program Director	\$63,440	1.00	100.00%	0.30	\$9,516	\$19,032	\$19,032	\$47,580
Totals	\$420,080	6.00	600.00%	2.50	\$67,096	\$134,192	\$134,192	\$335,480
Fringe Benefits Rate	22.40%							
Employee Fringe Benefits	\$94,098				\$15,030	\$30,059	\$30,059	\$75,148
Total Salaries and Benefits	\$514,178				\$82,126	\$164,251	\$164,251	\$410,628
HSA #2								11/18/2020

Program: Community Services - Cortland
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)	\$2,000	\$4,100	\$4,100	\$10,200
Office Supplies, Postage	\$1,300	\$2,600	\$2,600	\$6,500
Building Maintenance Supplies and Repair	\$4,200	\$8,400	\$8,400	\$21,000
Printing and Reproduction	\$300	\$600	\$600	\$1,500
Insurance	\$720	\$1,440	\$1,440	\$3,600
Staff Training	\$1,000	\$3,000	\$3,000	\$7,000
Staff Travel-(Local & Out of Town)	\$1,350	\$2,700	\$2,700	\$6,750
Rental of Equipment	\$400	\$900	\$900	\$2,200
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Program expenses for:				
activiteis, food, arts, crafts	\$9,911	\$18,623	\$18,623	\$47,157
Total Operating Expenses	\$21,181	\$42,363	\$42,363	\$105,907
HSA #3				11/18/2020

APPENDIX A – SERVICES TO BE PROVIDED

BERNAL HEIGHTS NEIGHBORHOOD CENTER - EXCELSIOR LOCATION

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Bernal Heights Neighborhood Center

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

The Outreach and Wellness Coordinator, will conduct wellness calls to existing and past consumers who haven't returned or received services this fiscal year. They will assist with COVID-19 friendly wellness outreach and education about the program and visit housing sites to support existing activities/deliveries.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving

services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 213 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,400 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 500 units of service of translation.
- Grantee will provide 1,500 units of service of social services.
- Grantee will provide 720 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 425 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 2,800 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 1,000 units of service of translation.
- Grantee will provide 3,000 units of service of social services.
- Grantee will provide 1,440 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

or

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6335
Steve.Kim@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name Bernal Heights Neighborhood Center	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services - Excelsior Center				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$125,591	\$191,501	\$191,501	\$508,593
Operating Expenses	\$50,376	\$73,477	\$73,477	\$197,330
Subtotal	\$175,967	\$264,978	\$264,978	\$705,923
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$26,395	\$39,747	\$39,747	\$105,889
Subcontractor/Capital Expenditure				
Total Expenditures	\$202,362	\$304,725	\$304,725	\$811,812
HSA Revenues				
General Fund	\$152,362	\$304,725	\$304,725	\$761,812
OTO	\$50,000			\$50,000
Total HSA Revenue	\$202,362	\$304,725	\$304,725	\$811,812
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$202,362	\$304,725	\$304,725	\$811,812
Full Time Equivalent (FTE) _____				
Prepared by: Pura Nagrampa	Telephone No.: 415-206-2140		Date: 11/18/2020	
HSA-CO Review Signature: _____				
HSA #1				11/18/2020

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Director of Program	\$80,000	1.00	100.00%	0.08	\$3,200	\$6,400	\$6,400	\$16,000
Asst. Program Director	\$63,440	1.00	100.00%	0.70	\$22,204	\$44,408	\$44,408	\$111,020
Social Services Supervisor	\$52,000	1.00	100.00%	1.00	\$26,000	\$52,000	\$52,000	\$130,000
Social Services Worker	\$47,840	1.00	100.00%	0.63	\$14,950	\$29,900	\$29,900	\$74,750
Senior Program Assistant	\$41,600	1.00	100.00%	0.50	\$10,400	\$20,800	\$20,800	\$52,000
Social Services Coordinator	\$47,840	1.00	100.00%	1.00	\$23,920			\$23,920
Totals	\$332,720	6.00	600.00%	3.91	\$100,674	\$153,508	\$153,508	\$407,690
Fringe Benefits Rate	24.75%							
Employee Fringe Benefits	\$82,348				\$24,917	\$37,993	\$37,993	\$100,903
Total Salaries and Benefits	\$415,068				\$125,591	\$191,501	\$191,501	\$508,593
HSA #2								11/18/2020

Program: Community Services - Excelsior Center
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property	\$20,764	\$41,528	\$41,528	\$103,820
Utilities (Elec, Water, Gas, Phone, Garbage)	\$5,000	\$8,000	\$8,000	\$21,000
Office Supplies, Postage	\$1,000	\$2,520	\$2,520	\$6,040
Building Maintenance Supplies and Repair	\$7,500	\$6,380	\$6,380	\$20,260
Printing and Reproduction	\$500	\$1,000	\$1,000	\$2,500
Insurance	\$1,320	\$2,640	\$2,640	\$6,600
Staff Training	\$500	\$2,000	\$2,000	\$4,500
Staff Travel-(Local & Out of Town)	\$3,000	\$4,800	\$4,800	\$12,600
Rental of Equipment	\$870	\$1,200	\$1,200	\$3,270
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Program expenses for				
activities, food, arts, crafts	\$9,922	\$3,409	\$3,409	\$16,740
Total Operating Expenses	\$50,376	\$73,477	\$73,477	\$197,330

HSA #3

11/18/2020

APPENDIX A – SERVICES TO BE PROVIDED

CATHOLIC CHARITIES

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Catholic Charities

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Grantee will operate “Catholic Charities van service” to provide transportation services to/from their service site and community programming to those individuals who are not able to use public transportation, or if transportation is not readily available due to the geographic limitations of the community.

- 5) Adult Day Program and Alzheimer’s Day Care Resource Center (ADCRC) – From January 1 through June 30, 2021, Grantee will provide non-medical day program services through an Adult Day Program currently licensed by the California Department of Social Services/Community Care Licensing. Services will be provided to functionally impaired adults and those with Alzheimer’s disease or other dementia related disorders. Grantee will ensure services are provided by trained, competent staff. Services will include an individual plan of care in a structured comprehensive program that will provide a variety of social, psychological, and related support services. Services offered will typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL (Activities of Daily Living) and supportive counseling. Education on resources and respite are also provided to the participant families and caregivers. Additionally, Grantee will enlist volunteers to help with the provision of services. Due to social distancing guidelines and health orders related to COVID-19, most services are to be conducted virtually or telephonically. Units of service are measured by the number of hours spent to provide adult day program and ADCRC services.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.

- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 225 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1000 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 350 units of service of translation.
- Grantee will provide 325 units of service of social services.
- Grantee will provide 425 units of service of enhanced outreach.

On an annual basis:

- Grantee will serve 450 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 2000 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 700 units of service of translation.
- Grantee will provide 650 units of service of social services.

- Grantee will provide 850 units of service of enhanced outreach.

For Adult Day Program and ADCRC services provided from January 1 through June 30, 2021:

- Grantee will serve 25 unduplicated Adult Day Program consumers.
- Grantee will service 10 unduplicated ADCRC consumers.
- Grantee will provide 9,250 Adult Day Program hours to consumers.
- Grantee will provide 3,000 ADCRC hours to consumers.
- Grantee will coordinate at least 6 meetings for the Adult Day Services Collaboration.
- Grantee will provide 150 caregiver support contacts.
- Grantee will provide 9 education sessions.
- Grantee will enlist 18 volunteers.
- Grantee will provide 325 volunteer hours.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

For Adult Day Program and ADCRC services provided from January 1 through June 30, 2021:

- At least 85% of survey respondents will indicate that the Adult Day Program has helped the participants remain safely in their current living/housing situation.
- At least 70% of participants enrolled in the Adult Day Program will avoid institutionalization as evidenced by participating in the program for at least 6 months from their date of enrollment.

- At least 85% of caregivers who participate in trainings will indicate that they are more aware of Alzheimer's and dementia related resources.
- At least 85% of caregivers surveyed report feeling less exhausted and isolated by the chronic stress of caregiving, and better able to attend to their own personal needs.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Ofelia Trevino
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3652
ofelia.trevino@sfgov.org

or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5597
patrick.garcia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name Catholic Charities		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$293,193	\$402,067	\$402,067	\$1,097,327
Operating Expenses	\$73,837	\$67,261	\$67,261	\$208,359
Subtotal	\$367,030	\$469,328	\$469,328	\$1,305,686
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$55,055	\$70,399	\$70,399	\$195,853
Subcontractor/Capital Expenditure				
Total Expenditures	\$422,086	\$539,727	\$539,727	\$1,501,540
HSA Revenues				
General Fund	\$408,586	\$539,727	\$539,727	\$1,488,040
OTO FY 20/21 (Breaking Bread)	\$13,500			\$13,500
Total HSA Revenue	\$422,086	\$539,727	\$539,727	\$1,501,540
Other Revenues				
Foundation / Grants	\$60,000	\$60,000	\$60,000	\$180,000
Program Income / Fees	\$8,000	\$22,790	\$22,790	\$53,580
TOTAL DAS AND NON DAS REVENUE	\$490,086	\$622,517	\$622,517	\$1,735,120
Full Time Equivalent (FTE)				
Prepared by: Patty Clement / Delilah Perez	Telephone No.: 415-452-3504 / 415-972-1208		Date: 11/18/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Division Director	\$134,985	1.00	33%	0.33	\$22,273	\$44,545	\$44,545	\$111,363
Program Manager	\$76,343	1.00	14%	0.14	\$5,344	\$10,688	\$10,688	\$26,720
Activities Coordinator	\$49,658	1.00	100%	1.00	\$24,829	\$49,658	\$49,658	\$124,145
Prog Asst #1	\$39,292	0.95	100%	0.95	\$18,664	\$37,327	\$37,327	\$93,318
Program Director - OMI	\$74,088	1.00	100%	1.00	\$37,044	\$74,088	\$74,088	\$185,220
Prog Asst #2 CE	\$39,292	0.90	72%	0.65	\$12,731	\$25,461	\$25,461	\$63,653
Prog Asst - Art Teacher	\$76,150	0.22	100%	0.22	\$8,377	\$16,753	\$16,753	\$41,883
Food Serv Coor	\$37,336	0.95	100%	0.95	\$17,735	\$17,735	\$17,735	\$53,205
Project Coordinator	\$48,875	1.00	31%	0.31	\$7,576	\$15,151	\$15,151	\$37,878
Prog Asst- On Call	\$39,292	0.22	100%	0.22	\$4,322	\$8,644	\$8,644	\$21,610
Division Director	\$134,985	1.00	24%	0.24	\$16,198			\$16,198
Program Director ADC / ADCRC	\$72,982	1.00	60%	0.60	\$21,895			\$21,895
Activity Coordinator	\$48,875	1.00	69%	0.69	\$16,862			\$16,862
Prog/Activity Asst- #1	\$39,292	0.90	28%	0.25	\$4,951			\$4,951
Totals	\$911,445	12.14	931.0%	7.55	\$218,801	\$300,050	\$300,050	\$818,901
Fringe Benefits Rate	34.00%							
Employee Fringe Benefits	\$309,891				\$74,392	\$102,017	\$102,017	\$278,426
Total Salaries and Benefits	\$1,221,336				\$293,193	\$402,067	\$402,067	\$1,097,327
HSA #2								10/25/2016

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property	\$42,625	\$29,624	\$29,624	\$101,873
Utilities (Elec, Water, Gas, Phone, Garbage)	\$14,381	\$15,968	\$15,968	\$46,317
Office Supplies, Postage	\$950	\$650	\$650	\$2,250
Building Maintenance Supplies and Repair	\$950	\$850	\$850	\$2,650
Printing and Reproduction				
Insurance	\$6,500	\$6,508	\$6,508	\$19,516
Staff Training				
Staff Travel-(Local & Out of Town)	\$750	\$1,000	\$1,000	\$2,750
Rental of Equipment	\$1,618	\$1,544	\$1,544	\$4,706
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Computer Related	\$750	\$850	\$850	\$2,450
Program Food & Supplies	\$4,713	\$9,067	\$9,067	\$22,847
Marketing & Advertsing Outreach	\$600	\$1,200	\$1,200	\$3,000
Total Operating Expenses	\$73,837	\$67,261	\$67,261	\$208,359
HSA #3				10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

CENTRO LATINO DE SAN FRANCISCO

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
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CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Centro Latino de San Francisco

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 208 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 518 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 65 units of service of translation.
- Grantee will provide 434 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 416 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,107 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 130 units of service of translation.
- Grantee will provide 868 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve 416 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,436 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 130 units of service of translation.
- Grantee will provide 868 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.

- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.

- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

or

Tahir Shaikh
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6085
Tahir.Shaikh@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name Centro Latino De San Francisco		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. No. of Mod.				
Program: Community Services				
Budget Reference Page No.(s)				
Program Term	1/1/21 - 6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	1/1/21 - 6/30/23
Expenditures				Total
Salaries & Benefits	\$46,931	\$95,016	\$95,016	\$236,963
Operating Expenses	\$10,953	\$20,752	\$20,752	\$52,457
Subtotal	\$57,884	\$115,768	\$115,768	\$289,420
Indirect Percentage (%)				
Indirect Cost				
Subcontractor/Capital Expenditure				
Total Expenditures	\$57,884	\$115,768	\$115,768	\$289,420
HSA Revenues				
General Fund	\$57,884	\$115,768	\$115,768	\$289,420
Total HSA Revenue	\$57,884	\$115,768	\$115,768	\$289,420
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$57,884	\$115,768	\$115,768	\$289,420
Full Time Equivalent (FTE)				
Prepared by: Gloria Bonilla		Telephone No.: (415) 286-0883		11/12/2020
HSA-CO Review Signature: _____				
HSA #1				11/12/2020

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	1/1/21 - 6/30/23
Last name, Title/function								
Executive Director	79,040	100%	0.09	9%	\$3,666	\$7,332	\$7,332	\$18,330
Assoc Director/Facilities Manager	72,800	75%	0.31	23%	\$8,372	\$16,740	\$16,740	\$41,852
Nutritionist/Qualify Assurance	47,840	100%	0.15	15%	\$3,588	\$7,176	\$7,176	\$17,940
Accountant	72,800	38%	0.23	9%	\$3,198	\$6,396	\$6,396	\$15,990
Social Worker	45,760	93%	0.22	21%	\$4,718	\$9,432	\$9,432	\$23,582
Janitor	35,360	50%	0.25	13%	\$2,237	\$4,476	\$4,476	\$11,189
Kitchen Aid	49,920	100%	0.35	35%	\$8,630	\$17,256	\$17,256	\$43,142
Driver I	37,440	63%	0.10	6%	\$1,170	\$2,340	\$2,340	\$5,850
Support Serv. Assit/Site Manager	35,360	30%	0.85	26%	\$4,522	\$9,036	\$9,036	\$22,594
Controller	93,600	13%	0.21	3%	\$1,303	\$2,604	\$2,604	\$6,511
Total	\$569,920	662%	2.77	158%	\$41,404	\$82,788	\$82,788	\$206,980
Fringe Benefits Rate	15%							
Employee Fringe Benefits	\$85,488				\$5,527	\$12,228	\$12,228	\$29,983
Total Salaries and Benefits	\$655,408				\$46,931	\$95,016	\$95,016	\$236,963

HSA #2

11/12/2020

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>1/1/21 - 6/30/23</u>
Rental of Property	-	-	-	-
Utilities (Elec, Water, Gas, Phone, Garbage)	\$5,187	\$10,314	\$10,314	\$25,815
Office Supplies, Postage	\$860	\$2,716	\$2,716	\$6,292
Building Maintenance Supplies and Repair	-	1,358.00	1,358.00	2,716.00
Printing and Reproduction	\$712	\$1,424	\$1,424	\$3,560
Payroll Services	244.00	\$488	\$488	\$1,220
Staff Training	-	-	-	-
Audit	500.00	\$1,000	\$1,000	\$2,500
Education and Program Supplies	3,450.00	\$3,452	\$3,452	\$10,354
<u>Consultant</u>				
Consultant A	-	-	-	-
<u>Other</u>	-			
Total Operating Expenses	\$10,953	\$20,752	\$20,752	\$52,457

HSA #3

11/12/2020

APPENDIX A – SERVICES TO BE PROVIDED

Curry Senior Center

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Curry Senior Center

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

In order to better raise community awareness of Curry Senior Center's programs, Curry Senior Center staff will participate in various larger community events including Project Homeless Connect, Community Housing Partnership's Senior Brownbag event, Tenderloin Sunday Streets, and other relevant events.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving

services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 100 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 369 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 57 units of service of translation.
- Grantee will provide 44 units of service of social services.
- Grantee will provide 13 units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 300 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1106 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 169 units of service of translation.
- Grantee will provide 131 units of service of social services.
- Grantee will provide 38 units of service of enhanced outreach.

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve 400 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1475 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 225 units of service of translation.
- Grantee will provide 175 units of service of social services.
- Grantee will provide 50 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Rick Appleby
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3644
Rick.appleby@sfgov.org

or

Ella Lee
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6134
Ella.lee@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name Curry Senior Center		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$125,310	\$250,620	\$250,620	\$626,550
Operating Expenses	\$33,739	\$67,477	\$67,477	\$168,693
Subcontractor/Capital Expenditure				
Subtotal	\$159,049	\$318,097	\$318,097	\$795,243
Salary and Operating Expenditure eligible for indirect	\$143,049	\$286,097	\$286,097	
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$21,457	\$42,914	\$42,914	\$107,285
Total Expenditures	\$180,506	\$361,011	\$361,011	\$902,528
HSA Revenues				
General Fund	\$180,506	\$361,011	\$361,011	\$902,528
Total HSA Revenue	\$180,506	\$361,011	\$361,011	\$902,528
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$180,506	\$361,011	\$361,011	\$902,528
Full Time Equivalent (FTE) _____				
Prepared by: _____		Telephone No.: _____		Date: _____
HSA-CO Review Signature: _____				
HSA #1				11/17/2020

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Budget	Budget	Budget
Senior Center Director	\$93,675	1.00	56.28%	0.56	\$26,360	\$52,720	\$52,720	\$131,800
Manager-Chinese	\$56,550	1.00	17.68%	0.18	\$5,000	\$10,000	\$10,000	\$25,000
Program Assistant-Lao	\$40,112	0.53	42.07%	0.22	\$4,500	\$9,000	\$9,000	\$22,500
Program Assistant-Russian	\$40,112	0.67	33.65%	0.22	\$4,500	\$9,000	\$9,000	\$22,500
Program Assistant-Vietnamese	\$39,000	0.80	28.85%	0.23	\$4,500	\$9,000	\$9,000	\$22,500
Program Assistant-Vietnamese	\$39,000	0.69	100.00%	0.69	\$13,520	\$27,040	\$27,040	\$67,600
Program Advocate	\$39,780	0.96	56.78%	0.55	\$10,840	\$21,685	\$21,685	\$54,210
Program Assistant-Tagalog	\$46,800	0.96	80.00%	0.77	\$17,970	\$35,940	\$35,940	\$89,850
Program Assistant-LGBT	\$40,950	1.00	32.72%	0.33	\$6,700	\$13,400	\$13,400	\$33,500
Wellness Program Manager	\$88,725	1.00	5.64%	0.06	\$2,500	\$5,000	\$5,000	\$12,500
Totals	\$524,704	8.61	453.67%	3.81	\$96,390	\$192,785	\$192,785	\$481,960
Fringe Benefits Rate	30.00%							
Employee Fringe Benefits	\$157,411				\$28,920	\$57,835	\$57,835	\$144,590
Total Salaries and Benefits	\$682,115				\$125,310	\$250,620	\$250,620	\$626,550

HSA #2

11/17/2020

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: 11/17/2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)	\$4,500	\$9,000	\$9,000	\$22,500
Office Supplies, Postage	\$3,100	\$6,200	\$6,200	\$15,500
Building Maintenance Supplies and Repair	\$3,029	\$6,047	\$6,047	\$15,123
Printing and Reproduction				
Insurance	\$3,050	\$6,100	\$6,100	\$15,250
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment				
<u>Consultant</u>				
Movement and Meditation	\$1,170	\$2,340	\$2,340	\$5,850
<u>Other</u>				
Program supplies	\$1,550	\$3,110	\$3,110	\$7,770
Payroll fees	\$300	\$600	\$600	\$1,500
Recruitment	\$200	\$400	\$400	\$1,000
Computer Support	\$840	\$1,680	\$1,680	\$4,200
St. Anthony's - Outreach & Safety (no indirect)	\$16,000	\$32,000	\$32,000	\$80,000
Total Operating Expenses	\$33,739	\$67,477	\$67,477	\$168,693
HSA #3				11/17/2020

APPENDIX A – SERVICES TO BE PROVIDED

EPISCOPAL COMMUNITY SERVICES

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Episcopal Community Services

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Grantee's enhanced outreach includes sending staff and informational materials to shelters, housing sites, adult education, and vocational programs to raise awareness about Episcopal Community Services programs for older adults and adults with disabilities. Grantee will also participate in three monthly sector-specific DAS community partnership meetings – Latinx partnership, African-American partnership, and Asian Pacific Islander partnership. The grantee will share information, resources, and discuss target population needs at these partnership meetings.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health

(CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 270 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1200 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 227 units of service of translation.
- Grantee will provide 688 units of service of social services.
- Grantee will provide 85 units of service of enhanced outreach.

On an annual basis, starting July 1, 2021:

- Grantee will serve 540 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 2400 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 454 units of service of translation.
- Grantee will provide 1377 units of service of social services.
- Grantee will provide 170 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.

- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Ofelia Trevino
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3652
ofelia.trevino@sfgov.org

or

Rocio Duenas
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5626
rocio.duenas@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name		Term		
EPISCOPAL COMMUNITY SERVICES OF SAN FRANCISCO		January 1, 2021 - June 30, 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. No. of Mod.				
Program: Community Services				
Budget Reference Page No.(s)				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total 1/1/21 - 6/30/23
Expenditures				
Salaries & Benefits	\$99,990	\$199,978	\$199,978	\$499,946
Operating Expenses	\$15,780	\$31,560	\$31,560	\$78,900
Subtotal	\$115,770	\$231,538	\$231,538	\$578,846
Indirect Percentage (%)	12.00%	12.00%	12.00%	12.00%
Indirect Cost	\$13,892	\$27,785	\$27,785	\$69,462
Subcontractor/Capital Expenditure				
Total Expenditures	\$129,662	\$259,323	\$259,323	\$648,308
HSA Revenues				
General Fund	\$129,662	\$259,323	\$259,323	\$648,308
Total HSA Revenue	\$129,662	\$259,323	\$259,323	\$648,308
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$129,662	\$259,323	\$259,323	\$648,308
Full Time Equivalent (FTE)	2.25	2.25	2.25	
Prepared by: Evelyn L. Lam	Telephone No.: 415-487-3300 X 1214		11/16/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total 1/1/21 - 6/30/23
Program Manager	\$87,360	1.00	50.00%	0.50	\$21,840	\$43,680	\$43,680	\$109,200
Soc Svs Specialist/CM III	\$62,670	1.00	100.00%	1.00	\$31,335	\$62,670	\$62,670	\$156,675
Activities Coordinator II	\$45,116	1.00	50.00%	0.50	\$11,279	\$22,558	\$22,558	\$56,395
Director of Healthy Aging	\$119,776	1.00	25.00%	0.25	\$14,972	\$29,944	\$29,944	\$74,860
Totals	\$314,922	4.00	225.00%	2.25	\$79,426	\$158,852	\$158,852	\$397,130
Fringe Benefits Rate	26.00%							
Employee Fringe Benefits	\$81,880				\$20,564	\$41,126	\$41,126	\$102,816
Total Salaries and Benefits	\$396,802				\$99,990	\$199,978	\$199,978	\$499,946
HSA #2								10/25/2016

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 11/16/2020

Operating Expense Detail

<u>Expenditure Category</u>				Total
	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>1/1/21 - 6/30/23</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)				
Office Supplies, Postage	\$850	\$1,700	\$1,700	\$4,250
Building Maintenance Supplies and Repair	\$6,000	\$12,000	\$12,000	\$30,000
Printing and Reproduction	\$600	\$1,200	\$1,200	\$3,000
Insurance	\$750	\$1,500	\$1,500	\$3,750
Staff Training	\$515	\$1,030	\$1,030	\$2,575
Staff Travel-(Local & Out of Town)	\$750	\$1,500	\$1,500	\$3,750
Rental of Equipment				
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Telecommunications	\$1,375	\$2,750	\$2,750	\$6,875
Program/Client Supplies	\$4,890	\$9,780	\$9,780	\$24,450
Staff Recruitment	\$50	\$100	\$100	\$250
Total Operating Expenses	\$15,780	\$31,560	\$31,560	\$78,900

HSA #3

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

FELTON INSTITUTE

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Felton Institute

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

As a relatively new Community Services site, Grantee's enhanced outreach will work to develop meaningful collaborations with residents and other stakeholders in the Visitacion Valley Community in order to gain better knowledge of community needs and raise awareness of Grantee's service offerings at 66 Raymond. Grantee will continue to participate in the Visitacion Valley Services Collaborative (a collective of 11 community based organizations operating in the neighborhood), the Visitacion Valley Neighborhood Association, and the Visitacion Valley Family Center Advisory Committee in order to pursue these goals.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the

Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For Community Services provided from January 1, 2021 to June 30, 2021:

- Grantee will serve 108 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 414 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 113 units of service of translation.
- Grantee will provide 75 units of service of social services.
- Grantee will provide 65 units of service of enhanced outreach.

For Community Services provided from July 1, 2021 to June 30, 2022:

- Grantee will serve 216 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 828 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 225 units of service of translation.
- Grantee will provide 150 units of service of social services.
- Grantee will provide 130 units of service of enhanced outreach.

For Community Services provided from July 1, 2022 to June 30, 2023:

- Grantee will serve 288 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,104 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 300 units of service of translation.
- Grantee will provide 200 units of service of social services.
- Grantee will provide 173 units of service of enhanced outreach. (Enter 0 if no enhanced outreach.)

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.

- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Reanna Albert
 Program Analyst
 P.O. Box 7988
 San Francisco, CA 94120
 (415) 557-6693
reanna.albert@sfgov.org

or

Rocio Duenas
 Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 (415) 557-5626
rocio.duenas@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name: **Felton Institute**

Term
 January 1, 2021 - June 30, 2023

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

Program: Community Services				
Budget Reference Page No.(s)				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$40,603	\$81,206	\$81,206	\$203,015
Operating Expenses	\$11,984	\$25,185	\$25,185	\$62,354
Subtotal	\$52,587	\$106,391	\$106,391	\$265,369
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$7,888	\$15,959	\$15,959	\$39,806
Subcontractor/Capital Expenditure	\$21,338	\$41,275	\$41,275	\$103,888
Total Expenditures	\$81,813	\$163,625	\$163,625	\$409,063
HSA Revenues				
General Fund	\$81,813	\$163,625	\$163,625	\$409,063
Total HSA Revenue	\$81,813	\$163,625	\$163,625	\$409,063
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$81,813	\$163,625	\$163,625	\$409,063
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 5/10/18	
HSA-CO Review Signature: _____				
HSA #1				11/18/2020

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Program Manager	\$70,000	1.00	13.80%	0.14	\$4,830	\$9,660	\$9,660	\$24,150
Activities Coordinator	\$50,000	1.00	100.00%	1.00	\$25,000	\$50,000	\$50,000	\$125,000
Senior Division Director	\$155,000	1.00	1.81%	0.02	\$1,403	\$2,806	\$2,806	\$7,015
Totals	\$275,000	3.00	115.61%	1.16	\$31,233	\$62,466	\$62,466	\$156,165
Fringe Benefits Rate	30.00%							
Employee Fringe Benefits	\$82,500				\$9,370	\$18,740	\$18,740	\$46,850
Total Salaries and Benefits	\$357,500				\$40,603	\$81,206	\$81,206	\$203,015
HSA #2								11/18/2020

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property	\$4,200	\$8,400	\$8,400	\$21,000
Utilities (Elec, Water, Gas, Phone, Garbage)	\$2,600	\$8,185	\$12,000	\$22,785
Office Supplies, Postage	\$1,000	\$2,000	\$2,000	\$5,000
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance	\$402	\$800	\$798	\$2,000
Staff Training				
Staff Travel-(Local & Out of Town)	\$182	\$400	\$364	\$946
Rental of Equipment				
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Activities Supplies and Program Expenses	\$3,600	\$5,400	\$1,623	\$10,623
Total Operating Expenses	\$11,984	\$25,185	\$25,185	\$62,354

HSA #3

11/18/2020

APPENDIX A-1 – SERVICES TO BE PROVIDED

Golden Gate Senior Services: Castro Center

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Golden Gate Senior Services

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 75 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 635 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 0 units of service of translation.
- Grantee will provide 0 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 225 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 938 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 0 units of service of translation.
- Grantee will provide 0 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve 300 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 2500 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 0 units of service of translation.
- Grantee will provide 0 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Rick Appleby
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3644
Rick.appleby@sfgov.org

or

Ella Lee
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6134
Ella.lee@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	G	J	K
1	Appendix B, Page 1				
2	Document Date: December 2020				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5					
6					
7	Name			Term	
8	Golden Gate Senior Services			Jan 2021 - Jun 2023	
9	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
10	If modification, Effective Date of Mod. No. of Mod.				
11	Program: Community Services, Castro				
12	Budget Reference Page No.(s)				
13	Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	Total
15	Expenditures				
16					
17	Salaries & Benefits	\$57,387	\$109,800	\$109,800	\$276,987
18	Operating Expenses	\$32,647	\$62,668	\$62,668	\$157,983
19	Subtotal	\$90,034	\$172,468	\$172,468	\$434,970
20	Indirect Percentage (%)	15.00%	15.00%	15.00%	10.00%
21	Indirect Cost	\$13,505	\$25,869	\$25,869	\$51,738
22	Capital Expenditure				
23	Sub-Contractor Expenditure				
24	Total Expenditures	\$103,539	\$198,337	\$198,337	\$486,708
25	HSA Revenues				
26					
27	General Fund	\$103,539	\$198,337	\$198,337	\$500,213
28					
29					
30					
31					
32					
33					
34					
35	Total HSA Revenue	\$103,539	\$198,337	\$198,337	\$500,213
36	Other Revenues				
37					
38					
39					
40					
41					
42					
43	TOTAL DAS AND NON DAS REVENUE	\$103,539	\$198,337	\$198,337	\$500,213
44					
45	Full Time Equivalent (FTE)				
47	Prepared by:			Date: 5/10/18	
48	HSA-CO Review Signature: _____				
49					
50	HSA #1				10/25/2016

	A	C	D	I	J	O	P	U	V	W
1	Program: Community Services, Castro									Appendix B, Page 3
2	(Same as Line 11 on HSA #1)									Document Date: December 2020
3										
4										
5	Operating Expense Detail									
6										
7		Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	Total				
9	<u>Expenditure Category</u>									
10	Rental of Property		\$18,587	\$39,035	\$39,035	\$96,657				
11	Utilities (Elec, Water, Gas, Phone, Garbage)		\$3,460	\$11,700	\$11,700	\$26,860				
12	Office Supplies, Postage		\$2,100	\$500	\$500	\$3,100				
13	Building Maintenance Supplies and Repair		\$4,700	\$11,433	\$11,433	\$27,566				
14	Printing and Reproduction									
15	Insurance									
16	Staff Training									
17	Staff Travel-(Local & Out of Town)									
18	Rental of Equipment									
19										
20	<u>Consultant</u>									
21	Consultant A									
22										
23										
24										
25	<u>Higher Learning</u>									
26	Accessible Yoga		\$3,800			\$3,800				
27										
28										
29										
30										
31										
32										
33	Total Operating Expenses		\$32,647	\$62,668	\$62,668	\$157,983				
34										
35	HSA #3						10/25/2016			

APPENDIX A-1 – SERVICES TO BE PROVIDED

Golden Gate Senior Services: Richmond Senior Services

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Golden Gate Senior Services

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 82 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 588 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 100 units of service of translation.
- Grantee will provide 113 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 244 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1763 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 300 units of service of translation.
- Grantee will provide 338 units of service of social services.
- Grantee will provide TBD units of service of enhanced outreach. (Enter 0 if no enhanced outreach.)

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve 325 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 2350 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 400 units of service of translation.
- Grantee will provide 450 units of service of social services.
- Grantee will provide TBD units of service of enhanced outreach. (Enter 0 if no enhanced outreach.)

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Rick Appleby
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3644
Rick.appleby@sfgov.org

or

Ella Lee
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6134
Ella.lee@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E
1	Appendix B, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				11/23/2020
4	BY PROGRAM				
5	Name		Term		
6	GOLDEN GATE SENIOR SERVICES		1/1/21-6/30/23		
7	(Check One) New Renewal x Modification _____				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Community Services - Richmond Senior Center				
10	Budget Reference Page No.(s)				1/1/21-6/30/23
11	Program Term		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23
12	Expenditures				
13	Salaries & Benefits	\$154,023	\$262,886	\$262,886	\$679,795
14	Operating Expenses	\$18,486	\$10,649	\$10,649	\$39,784
15	Subtotal	\$172,509	\$273,535	\$273,535	\$719,579
16	Indirect Percentage (%)	15%	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$25,876	\$41,030	\$41,030	\$107,937
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0
19	Total Expenditures	\$198,385	\$314,565	\$314,565	\$827,516
20	HSA Revenues				
21	General Fund	\$198,385	\$314,565	\$314,565	\$827,515
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$198,385	\$314,565	\$314,565	\$827,515
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$198,385	\$314,565	\$314,565	\$827,515
37	Full Time Equivalent (FTE)				
39	Prepared by:		Telephone No.:		
40	HSA-CO Review Signature: _____				
41	HSA #1				12/2/2020

	A	B	C	D	E	F	G	H	I	J	K	L
1												Appendix B, Page 3
2												
3	GOLDEN GATE SENIOR SERVICES											
4	Program: Community Services - Richmond Senior Center											
5												
6												
7	Operating Expense Detail											
8												
9												
10												
11												TOTAL
12	<u>Expenditure Category</u>			TERM	<u>1/1/21-6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>1/1/21-6/30/23</u>					<u>1/1/21-6/30/23</u>
13	Building Maintenance Supplies and Repair											\$ -
14	IT & Web Support				\$2,000	\$2,000	\$2,000					\$ 6,000
15	Office Supplies, Postage				\$3,200	\$1,500	\$1,500					\$ 6,200
16	Printing & Reproduction				\$500	\$250	\$250					\$ 1,000
17	Programs & Events				\$4,900	\$4,000	\$4,000					\$ 12,900
18	Rental of Equipment											\$ -
19	Rental of Property				\$6,805	\$2,899	\$2,899					\$ 12,603
20	Staff/Vol training/recognition											\$ -
21	Transport/Travel-(Local & Out of Town)				\$481							\$ 481
22	Utilities(Elec, Water, Gas, Phone, Garbage)				\$600							\$ 600
23	CONSULTANTS											
24												\$ -
25												
26												
27	OTHER											
28												\$ -
29												
30												
31	TOTAL OPERATING EXPENSE				\$ 18,486	\$ 10,649	\$ 10,649					\$ 39,784
32												
33	HSA #3											12/2/2020

APPENDIX A – SERVICES TO BE PROVIDED

Independent Living Resource Center San Francisco: Community Services

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Independent Living Resource Center San Francisco

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 30 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 150 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 63 units of service of translation.
- Grantee will provide 75 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 90 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 450 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 188 units of service of translation.
- Grantee will provide 225 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve 120 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 600 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 250 units of service of translation.
- Grantee will provide 300 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Rick Appleby
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3644
Rick.Appleby1@sfgov.org

or

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6335
Steve.Kim@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name		Term		
Independent Living Resource Center San Francisco		Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$35,009	\$70,020	\$70,020	\$175,049
Operating Expenses	\$16,910	\$33,818	\$33,818	\$84,546
Subtotal	\$51,919	\$103,838	\$103,838	\$259,595
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$7,788	\$15,576	\$15,576	\$38,940
Subcontractor/Capital Expenditure				
Total Expenditures	\$59,707	\$119,414	\$119,414	\$298,535
HSA Revenues				
General Fund	\$59,707	\$119,414	\$119,414	\$298,535
Total HSA Revenue	\$59,707	\$119,414	\$119,414	\$298,535
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$59,707	\$119,414	\$119,414	\$298,535
Full Time Equivalent (FTE)				
Prepared by: Jerome Lourme	Telephone No.: 415-717-3563	Date: 11/16/2020		
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Community Activities Coordinator	\$52,704	1.00	40.00%	0.40	\$10,541	\$21,082	\$21,082	\$52,705
Community Activities Assistant	\$35,166	0.80	20.00%	0.16	\$2,813	\$5,627	\$5,627	\$14,067
Systems Change Director	\$63,100	1.00	30.00%	0.30	\$9,465	\$18,930	\$18,930	\$47,325
Administrative Director	\$63,839	1.00	8.00%	0.08	\$2,554	\$5,107	\$5,107	\$12,768
Executive Director	\$108,096	1.00	5.00%	0.05	\$2,702	\$5,405	\$5,405	\$13,512
Totals	\$322,905	4.80	103.00%	0.99	\$28,075	\$56,151	\$56,151	\$140,377
Fringe Benefits Rate	24.70%							
Employee Fringe Benefits	\$79,757				\$6,934	\$13,869	\$13,869	\$34,672
Total Salaries and Benefits	\$402,662				\$35,009	\$70,020	\$70,020	\$175,049

HSA #2 10/25/2016

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property	\$8,041	\$16,082	\$16,082	\$40,205
Utilities (Elec, Water, Gas, Phone, Garbage)	\$1,773	\$3,546	\$3,546	\$8,865
Office Supplies, Postage	\$434	\$868	\$868	\$2,170
Building Maintenance Supplies and Repair	\$377	\$752	\$752	\$1,881
Printing and Reproduction	\$100	\$200	\$200	\$500
Insurance	\$653	\$1,306	\$1,306	\$3,265
Staff Training	\$100	\$200	\$200	\$500
Staff Travel-(Local & Out of Town)	\$500	\$1,000	\$1,000	\$2,500
Rental of Equipment	\$206	\$412	\$412	\$1,030
Consultant				
Sign Language, Translationn, Workshop Facilitation	\$1,000	\$2,000	\$2,000	\$5,000
IT Support	\$388	\$776	\$776	\$1,940
Miscellaneous Shared Support	\$88	\$176	\$176	\$440
Other				
Dues and Subscriptions	\$800	\$1,600	\$1,600	\$4,000
Program Supplies	\$750	\$1,500	\$1,500	\$3,750
Client Activities Food	\$700	\$1,400	\$1,400	\$3,500
Outreach and Education	\$500	\$1,000	\$1,000	\$2,500
Client Activities Events	\$500	\$1,000	\$1,000	\$2,500
Total Operating Expenses	\$16,910	\$33,818	\$33,818	\$84,546
HSA #3				10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

KIMOCHI INC

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Kimochi Inc.

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts will not be provided under this specific grant.

- 5) Adult Day Program – From January 1 through June 30, 2021, Grantee will provide non-medical day program services to functionally impaired adults through an Adult Day Program currently licensed by the California Department of Social Services/Community Care Licensing. Grantee will ensure services are provided by trained, competent staff. Services will include an individual plan of care in a structured comprehensive program that will provide a variety of social, psychological, and related support services. Services offered will typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL (Activities of Daily Living) and supportive counseling. Due to social distancing guidelines and health orders related to COVID-19, most services are to be conducted virtually or telephonically. Units of service are measured by the number of hours spent to provide adult day program services.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 200 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 500 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 625 units of service of translation.
- Grantee will provide 1,000 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 400 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,000 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 1,250 units of service of translation.
- Grantee will provide 2,000 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For Adult Day Program services provided from January 1 through June 30, 2021:

- Grantee will serve 20 unduplicated Adult Day Program consumers.
- Grantee will provide 10,000 Adult Day Program hours to consumers.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

For Adult Day Program services provided from January 1 through June 30, 2021:

- At least 85% of survey respondents will indicate that the Adult Day Program has helped the participants remain safely in their current living/housing situation.
- At least 70% of participants enrolled in the Adult Day Program will avoid institutionalization as evidenced by participating in the program for at least 6 months from their date of enrollment.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The

report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.

- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

or

Ella Lee
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6134
Ella.Lee@sfgov.org

XI. 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 that program staff

have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name Kimochi Inc.		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
DAS Expenditures				
Salaries & Benefits	\$112,764	\$164,672	\$164,672	\$442,108
Operating Expenses	\$9,462	\$25,055	\$25,055	\$59,572
Subtotal	\$122,226	\$189,727	\$189,727	\$501,680
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$18,334	\$28,459	\$28,459	\$75,252
Subcontractor/Capital Expenditure				
Total Expenditures	\$140,560	\$218,186	\$218,186	\$576,932
HSA Revenues				
General Fund	\$140,560	\$218,186	\$218,186	\$576,932
Total HSA Revenue	\$140,560	\$218,186	\$218,186	\$576,932
Non DAS Expenditures				
Salaries & Benefits	\$36,172			\$36,172
Operating Expenses	\$5,138	\$18,445	\$18,445	\$42,028
Subtotal	\$41,310	\$18,445	\$18,445	\$78,200
Other Revenues				
Fundraising	\$41,310	\$18,445	\$18,445	\$78,200
In-Kind Volunteer				
Total Non DAS Revenues	\$41,310	\$18,445	\$18,445	\$78,200
TOTAL DAS AND NON DAS REVENUE	\$181,870	\$236,631	\$236,631	\$655,132
Full Time Equivalent (FTE)				
Prepared by: Shawne O'Connell	Telephone No.:	Date: 11/18/20		
HSA-CO Review Signature: _____				
HSA #1				

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Budget	Budget	Budget
Social Services Coordinator	\$56,160	1.00	10.00%	0.10	\$2,808	\$5,616	\$5,616	\$14,040
Senior Center Coordinator	\$50,918	1.00	20.00%	0.20	\$5,092	\$10,184	\$10,184	\$25,460
Transportation Coordinator	\$50,960	1.00	20.00%	0.20	\$5,096	\$10,192	\$10,192	\$25,480
ADP Coordinator	\$40,000	1.00	100.00%	1.00	\$20,000			\$20,000
Senior Center Assistant	\$41,600	1.00	50.00%	0.50	\$10,400	\$20,800	\$20,800	\$52,000
ADP Asst./Program Manager	\$34,580	0.88	30.00%	0.26	\$4,539			\$4,539
Program Specialist	\$41,600	1.00	100.00%	1.00	\$20,800	\$41,600	\$41,600	\$104,000
Case Manager, Japanese	\$45,760	1.00	50.00%	0.50	\$11,440	\$22,880	\$22,880	\$57,200
Case Manager, Korean	\$47,840	1.00	45.00%	0.45	\$10,764	\$21,528	\$21,528	\$53,820
Totals	\$409,418	8.88	425.00%	4.21	\$90,939	\$132,800	\$132,800	\$356,539
Fringe Benefits Rate	24.00%							
Employee Fringe Benefits	\$98,260				\$21,825	\$31,872	\$31,872	\$85,569
Total Salaries and Benefits	\$507,678				\$112,764	\$164,672	\$164,672	\$442,108

Operating Expense Detail

	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
DAS Expenditure Category				
Rental of Property	\$3,000	\$12,000	\$12,000	\$27,000
Utilities (Elec, Water, Gas, Phone, Garbage)	\$1,162	\$2,000	\$2,000	\$5,162
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance	\$2,000	\$2,000	\$2,000	\$6,000
Staff Training				
Computer/IT/Website	\$700	\$2,955	\$2,955	\$6,610
Rental of Equipment	\$1,000	\$1,000	\$1,000	\$3,000
Consultant				
Prof. Svcs. Acctg.		\$1,100	\$1,100	\$2,200
Other				
Data Plan				
Dues & Subscriptions	\$100			\$100
Outside Services		\$1,500	\$1,500	\$3,000
Auto Fuel				
Telephone	\$1,500	\$2,500	\$2,500	\$6,500
Maintenance Contracts				
Total Operating Expenses	\$9,462	\$25,055	\$25,055	\$59,572
Non DAS Expenditure Category				
ADP Utilities (Elec, Water, Gas, Phone, Garbage)	\$2,000	\$6,000	\$6,000	\$14,000
ADP Office Supplies, Postage	\$500	\$1,745	\$1,745	\$3,990
ADP Insurance		\$1,000 #	\$1,000	\$2,000
ADP Computer/IT/Website		\$1,000	\$1,000	\$2,000
ADP License	\$138	\$700	\$700	\$1,538
ADP Outside Services	\$1,000	\$3,000	\$3,000	\$7,000
CS Office Supplies, Postage	\$500	\$2,000	\$2,000	\$4,500
CS Outside Services	\$1,000	\$3,000	\$3,000	\$7,000
Total Operating Expenses	\$5,138	\$18,445 #	\$18,445	\$42,028

APPENDIX A – SERVICES TO BE PROVIDED
LIGHTHOUSE FOR THE BLIND AND VISUALLY IMPAIRED
COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	LightHouse for the Blind and Visually Impaired

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Grantee will outreach to develop relationships with eye care professionals (ophthalmologists, optometrists, etc.) to raise awareness about Grantee services and facilitate referrals. Grantee has the capability to develop outreach materials in braille and other accessible formats and will do so to provide information to consumers about Lighthouse and other community providers.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or

health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For Community Services provided from January 1, 2021 to June 30, 2021:

- Grantee will serve 100 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 360 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 12 units of service of translation.
- Grantee will provide 420 units of service of social services.
- Grantee will provide 40 units of service of enhanced outreach.

For Community Services provided from July 1, 2021 to June 30, 2022:

- Grantee will serve 150 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 540 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 18 units of service of translation.
- Grantee will provide 562 units of service of social services.
- Grantee will provide 63 units of service of enhanced outreach.

For Community Services provided from July 1, 2022 to June 30, 2023:

- Grantee will serve 200 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 720 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 24 units of service of translation.
- Grantee will provide 750 units of service of social services.
- Grantee will provide 84 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to

HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.

- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Reanna Albert
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 557-6693
reanna.albert@sfgov.org

or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5597
patrick.garcia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name Lighthouse for the Blind and Visually Impaired	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$49,866	\$99,731	\$99,731	\$249,328
Operating Expenses	\$172	\$342	\$342	\$856
Subtotal	\$50,038	\$100,073	\$100,073	\$250,184
Indirect Percentage (%)	10.00%	10.00%	10.00%	10.00%
Indirect Cost	\$5,003	\$10,008	\$10,008	\$25,019
Subcontractor/Capital Expenditure				
Total Expenditures	\$55,041	\$110,081	\$110,081	\$275,203
HSA Revenues				
General Fund	\$55,041	\$110,081	\$110,081	\$275,203
Total HSA Revenue	\$55,041	\$110,081	\$110,081	\$275,203
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$55,041	\$110,081	\$110,081	\$275,203
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 11/19/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Information concierge	\$44,752	1.00	12.00%	0.12	\$2,685	\$5,370	\$5,370	\$13,425
Jr. Executive Assistant	\$51,090	1.00	40.00%	0.40	\$10,218	\$20,436	\$20,436	\$51,090
Adult Program Manager	\$58,370	1.00	50.00%	0.50	\$14,593	\$29,185	\$29,185	\$72,963
Director	\$108,535	1.00	15.00%	0.15	\$8,140	\$16,280	\$16,280	\$40,700
Senior Director	\$170,280	1.00	5.00%	0.05	\$4,257	\$8,514	\$8,514	\$21,285
Totals	\$433,027	5.00	122.00%	1.22	\$39,893	\$79,785	\$79,785	\$199,463
Fringe Benefits Rate	25.00%							
Employee Fringe Benefits	\$108,257				\$9,973	\$19,946	\$19,946	\$49,865
Total Salaries and Benefits	\$541,284				\$49,866	\$99,731	\$99,731	\$249,328
HSA #2								10/25/2016

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training	\$172	\$342	\$342	\$856
Staff Travel-(Local & Out of Town)				
Rental of Equipment				
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Total Operating Expenses	\$172	\$342	\$342	\$856

HSA #3

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

Mission Neighborhood Centers

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Mission Neighborhood Centers

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above *or*
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Grantee owns a ten-passenger van which is used to pick-up and drop-off clients at Mission Housing Development Corporation senior housing sites.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period of January 1, 2021 – June 30, 2021:

- Grantee will serve 391 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 913 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 303 units of service of translation.
- Grantee will provide 775 units of service of social services.
- Grantee will provide 525 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 782 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1825 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 605 units of service of translation.
- Grantee will provide 1550 units of service of social services.
- Grantee will provide 1050 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Manager and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Fanny Lapitan, Program Manager
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3696
fanny.lapitan@sfgov.org

or

Steve Kim, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6335
steve.kim@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Mission Neighborhood Centers		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$114,578	\$236,255	\$243,567	\$594,400
Operating Expenses	\$39,856	\$66,230	\$66,153	\$172,239
Subtotal	\$154,434	\$302,485	\$309,720	\$766,639
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$23,165	\$45,373	\$46,458	\$114,996
Subcontractor/Capital Expenditure	\$38,070	\$83,480	\$75,160	\$196,710
Total Expenditures	\$215,669	\$431,338	\$431,338	\$1,078,345
HSA Revenues				
General Fund	\$188,169	\$376,338	\$376,338	\$940,845
OTO	\$27,500	\$55,000	\$55,000	\$137,500
Total HSA Revenue	\$215,669	\$431,338	\$431,338	\$1,078,345
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$215,669	\$431,338	\$431,338	\$1,078,345
Full Time Equivalent (FTE)				
Prepared by: Aurora Alvarado	Telephone No.: 415.206.7750		Date: 11/16/2020	
HSA-CO Review Signature: _____				
HSA #1				10/26/2016

Salaries & Benefits Detail

Position	Agency Totals				HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	FY 21/22 Full Time Salary for FTE	FY 22/23 Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Activities & Outreach Specialist	\$52,000	\$53,610	\$55,270	1.00	86.00%	0.86	\$22,360	\$46,105	\$47,532	\$115,997
Community Services & Act Spec	\$52,000	\$53,610	\$55,270	1.00	90.00%	0.90	\$23,400	\$48,249	\$49,743	\$121,392
Information and Assistance Spec	\$49,920	\$51,465	\$53,060	1.00	35.00%	0.35	\$8,736	\$18,013	\$18,571	\$45,320
Senior Program Manager	\$68,640	\$70,765	\$72,955	1.00	87.00%	0.87	\$29,858	\$61,566	\$63,471	\$154,895
Janitor	\$37,128	\$38,280	\$39,460	1.00	13.00%	0.13	\$2,413	\$4,976	\$5,130	\$12,519
Jr. Accountant	\$46,488	\$47,925	\$49,410	1.00	3.00%	0.03	\$697	\$1,438	\$1,482	\$3,617
Totals	\$306,176	\$315,655	\$325,425	6.00	314.00%	3.14	\$87,464	\$180,347	\$185,929	\$453,740
Fringe Benefits Rate	31.00%									
Employee Fringe Benefits	\$94,915	\$97,853	\$100,882				\$27,114	\$55,908	\$57,638	\$140,660
Total Salaries and Benefits	\$401,091						\$114,578	\$236,255	\$243,567	\$594,400
HSA #2										10/25/2016

Program: Community Services
(Same as Line 11 on HSA #1)

Appendix B, Page 3
Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Utilities (Elec, Water, Gas, Phone, Garbage)	\$7,500	\$15,000	\$16,000	\$38,500
Office Supplies, Postage	\$1,500	\$1,700	\$1,800	\$5,000
Building Maintenance Supplies and Repair	\$2,300	\$2,500	\$2,500	\$7,300
Printing and Reproduction	\$800	\$1,200	\$1,200	\$3,200
Insurance	\$2,500	\$5,000	\$5,200	\$12,700
Staff Training	\$1,000	\$1,000	\$1,000	\$3,000
Rental of the property	\$1,500	\$3,600	\$3,600	\$8,700
<u>Other</u>				
Fuel Maintenance & Repair	\$1,800	\$3,000	\$3,000	\$7,800
Advertising	\$2,000	\$2,000	\$2,000	\$6,000
Program Supplies	\$2,520	\$5,040	\$5,040	\$12,600
Food Supplies	\$2,000	\$4,000	\$4,000	\$10,000
Janitorial Supplies	\$3,000	\$4,500	\$4,500	\$12,000
Stipend for Participants	\$2,000	\$2,000	\$2,000	\$6,000
Transportation	\$1,300	\$2,600	\$2,600	\$6,500
Covid-19 Emergency Response	\$5,136			\$5,136
Educational Fieldtrips		\$9,090	\$7,713	\$16,803
Recruitment & Outreach	\$3,000	\$4,000	\$4,000	\$11,000
Total Operating Expenses	\$39,856	\$66,230	\$66,153	\$172,239
HSA #3				10/25/2016

Subcontractor & Capital Expenditure Detail

<u>Subcontractor Expenditure</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Nurse	\$300	\$300	\$300	\$900
Nutritionist/Cooking Class	\$1,200	\$1,200	\$1,200	\$3,600
Fitness Trainer	\$6,630	\$14,040	\$14,040	\$34,710
Group Therapist	\$2,600	\$5,200	\$5,200	\$13,000
Latin Dance Instructor	\$6,500	\$13,000	\$13,000	\$32,500
Art For Elders Instructor	\$7,840	\$16,640	\$8,320	\$32,800
Music Instructor	\$13,000	\$20,500	\$20,500	\$54,000
Music Performer / DJ		\$12,600	\$12,600	\$25,200
Total Subcontractor Expenditure	\$38,070	\$83,480	\$75,160	\$196,710
<u>Equipment (Qty)</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Equipment A				
Total Equipment Cost				
<u>Remodeling</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Remodel A				
Total Remodeling Cost				
Total Capital Expenditure	\$38,070	\$83,480	\$75,160	\$196,710

HSA #4

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

On Lok Day Services: 30th Street Center

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	On Lok

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 388 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 864 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 114 units of service of translation.
- Grantee will provide 473 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 1163 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 6075 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 1545 units of service of translation.
- Grantee will provide 1418 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For the period July 1, 2022 – June 30, 2032:

- Grantee will serve 1550 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 8100 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 2060 units of service of translation.
- Grantee will provide 1890 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Rick Appleby
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3644
Rick.appleby@sfgov.org

or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5597
patrick.garcia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name On Lok Day Services		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$173,138	\$366,336	\$366,336	\$905,810
Operating Expenses	\$24,393	\$2,457	\$2,457	\$29,307
Subtotal	\$197,531	\$368,793	\$368,793	\$935,117
Indirect Percentage (%)	9%	9%	9%	9.00%
Indirect Cost	\$17,777	\$33,192	\$33,192	\$84,161
Subcontractor/Capital Expenditure	\$5,707	\$11,414	\$11,414	\$28,535
Total Expenditures	\$221,015	\$413,399	\$413,399	\$1,047,813
HSA Revenues				
General Fund	\$221,015	\$413,399	\$413,399	\$1,047,813
Total HSA Revenue	\$221,015	\$413,399	\$413,399	\$1,047,813
Other Revenues				
Fundraising	\$86,060	\$271,585	\$271,585	\$629,230
Volunteers	\$8,344	\$16,688	\$16,688	\$41,720
TOTAL DAS AND NON DAS REVENUE	\$315,419	\$701,672	\$701,672	\$1,718,763
Full Time Equivalent (FTE)	4.74	5.08	5.08	
Prepared by: Meko Ma	Telephone No.:	(628) 208-8546	Date:	11/19/2020
HSA-CO Review Signature: _____				
HSA #1				11/19/2020

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary	HSA Program			DAS budgeted salary		
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Accountant	\$62,130	1.00	30.00%	0.30	\$9,320	1.00	30.00%	0.30	\$18,639	\$18,639	\$46,598
Activities Program Manager	\$61,006	1.00	65.00%	0.65	\$19,827	1.00	65.00%	0.65	\$39,654	\$39,654	\$99,135
Administrative Secretary	\$59,010	1.00	25.00%	0.25	\$7,376	1.00	25.00%	0.25	\$14,753	\$14,753	\$36,882
Assistant Director	\$90,002	1.00	25.00%	0.25	\$11,250	1.00	25.00%	0.25	\$22,501	\$22,501	\$56,252
Senior Center Associate #1	\$48,152	1.00	100.00%	1.00	\$24,076	1.00	100.00%	1.00	\$48,152	\$48,152	\$120,380
Senior Center Associate #2	\$47,840	1.00	100.00%	1.00	\$23,920	1.00	100.00%	1.00	\$47,840	\$47,840	\$119,600
Hospitality Ctr Coord	\$48,422	1.00	43.00%	0.43	\$10,411	1.00	43.00%	0.43	\$20,821	\$20,821	\$52,053
Volunteer Program Manager	\$72,800	1.00	70.00%	0.70	\$25,480	1.00	70.00%	0.70	\$50,960	\$50,960	\$127,400
Com Serv Progr Asst.	\$45,760	0.25	63.00%	0.16	\$3,604	1.00	50.00%	0.50	\$22,880	\$22,880	\$49,364
Totals	\$535,122	8.25	521.00%	4.74	\$135,264	9.00	508.00%	5.08	\$286,200	\$286,200	\$707,664
Fringe Benefits Rate	28.00%										
Employee Fringe Benefits	\$149,834				\$37,874				\$80,136	\$80,136	\$198,146
Total Salaries and Benefits	\$684,956				\$173,138				\$366,336	\$366,336	\$905,810

HSA #2 11/19/2020

Program: Community Services
 (Same as Line 11 on HSA #1)

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)	6,188	623	623	\$7,434
Office Supplies, Postage	278	28	28	\$334
Building Maintenance Supplies and Repair	17,927	1,806	1,806	\$21,539
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment				
<u>Consultant</u>				
<u>Other</u>				
Total Operating Expenses	\$24,393	\$2,457	\$2,457	\$29,307

HSA #3 11/19/2020

Subcontractor & Capital Expenditure Detail

<u>Subcontractor Expenditure</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Subcontractor A				
Body Dynamics-Tanako Hagiwara	\$5,400	\$10,800	\$10,800	\$27,000
Art Class-Esperanza Villanueva	\$307	\$614	\$614	\$1,535
Total Subcontractor Expenditure	\$5,707	\$11,414	\$11,414	\$28,535
<u>Equipment (Qty)</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Equipment A				
Total Equipment Cost				
<u>Remodeling</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Remodel A				
Total Remodeling Cost				
Total Capital Expenditure	\$5,707	\$11,414	\$11,414	\$28,535

HSA #4

11/19/2020

APPENDIX A – SERVICES TO BE PROVIDED

Openhouse

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Openhouse

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

In addition to general outreach to raise community awareness of Openhouse’s offerings, Openhouse will be engaging in Enhanced Outreach by specifically targeting additional outreach to the Transgender community and LGBTQ+ older adults of color. In order to reach and engage these “communities within communities,” Openhouse will develop specific programming in-house as well as fostering cross-organizational programming with other local organizations. Openhouse will also continue collaborations with organizations such as API Wellness/Trans Thrive, Lyric, Positive Resource Center, and the City’s Office of Transgender Initiatives.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health

(CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 100 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 325 units of service of Activity Scheduling at a center or venues approved by the Office on the Aging.
- Grantee will provide 0 units of service of Translation.
- Grantee will provide 275 units of service of Social Services.
- Grantee will provide 23 units of service of Enhanced Outreach

For the period July 1, 2021 – June 30, 2022:

- Grantee will serve 300 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 975 units of service of Activity Scheduling at a center or venues approved by the Office on the Aging.
- Grantee will provide 0 units of service of Translation.
- Grantee will provide 825 units of service of Social Services.
- Grantee will provide 68 units of service of Enhanced Outreach

For the period July 1, 2022 – June 30, 2023:

- Grantee will serve 400 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,300 units of service of Activity Scheduling at a center or venues approved by the Office on the Aging.
- Grantee will provide 0 units of service of Translation.
- Grantee will provide 1,100 units of service of Social Services.
- Grantee will provide 90 units of service of Enhanced Outreach

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need

from the agency.

- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.

- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Richard Appleby
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3644
Rick.appleby@sfgov.org

or

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6335
Steve.kim@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Openhouse	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$161,892	\$236,827	\$236,827	\$635,546
Operating Expenses				
Subtotal	\$161,892	\$236,827	\$236,827	\$635,546
Indirect Percentage (%)	15%	15%	15%	15.00%
Indirect Cost	\$24,284	\$35,524	\$35,524	\$95,332
Subcontractor/Capital Expenditure				
Total Expenditures	\$186,176	\$272,351	\$272,351	\$730,878
HSA Revenues				
General Fund	\$136,176	\$272,351	\$272,351	\$680,878
OTO Funds (01/01/21 - 06/30/21)	\$50,000			\$50,000
Total HSA Revenue	\$186,176	\$272,351	\$272,351	\$730,878
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$186,176	\$272,351	\$272,351	\$730,878
Full Time Equivalent (FTE)				
Prepared by: Matthew Cimino	Telephone No.: 415-530-2783		Date: 11/16/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Director of Programs	\$110,281	1.00	19.28%	0.19	\$21,263	\$42,527	\$42,527	\$106,317
Comm. Eng. Mgr	\$72,420	1.00	11.74%	0.12	\$8,500	\$17,000	\$17,000	\$42,500
SW Program Spv	\$61,214	1.00	35.50%	0.35	\$21,730	\$43,460	\$43,460	\$108,650
Staff Training & Dev	\$84,760	0.60	10.18%	0.06	\$5,178			\$5,178
Education Coordinator	\$50,648	0.50	50.00%	0.25	\$12,662	\$25,324	\$25,324	\$63,310
Activities Coordinator	\$49,275	1.00	45.18%	0.45	\$22,265	\$25,545	\$25,545	\$73,355
Men's Group Facilitator	\$96,000	0.13	34.82%	0.04	\$4,178	\$13,000	\$13,000	\$30,178
Community Engagement Coord	\$48,984	1.00	18.42%	0.18	\$9,024	\$15,000	\$15,000	\$39,024
Data Coordinator	\$48,000	0.25	64.58%	0.16	\$7,750	\$15,500	\$15,500	\$38,750
Food Coordinator	\$44,720	1.00	50.00%	0.50	\$22,360			\$22,360
Totals	\$666,303	7.48	339.70%	2.32	\$134,910	\$197,356	\$197,356	\$529,622
Fringe Benefits Rate	20.00%							
Employee Fringe Benefits	\$133,261				\$26,982	\$39,471	\$39,471	\$105,924
Total Salaries and Benefits	\$799,564				\$161,892	\$236,827	\$236,827	\$635,546

HSA #2

10/25/2016

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: 11/16/20

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment				
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Total Operating Expenses				

HSA #3

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED
RUSSIAN AMERICAN COMMUNITY SERVICES

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Russian American Community Services

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

No enhanced outreach is being funded through this grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 175 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 291 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 125 units of service of translation.
- Grantee will provide 625 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 350 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 582 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 250 units of service of translation.
- Grantee will provide 1250 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Ofelia Trevino
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3652
ofelia.trevino@sfgov.org

or

Ella Lee
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6134
ella.lee@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name Russian American Community Services		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$26,381	\$52,761	\$52,761	\$131,903
Operating Expenses	\$15,707	\$31,413	\$31,413	\$78,533
Subtotal	\$42,088	\$84,174	\$84,174	\$210,436
Indirect Percentage (%)	14.00%	14.00%	14.00%	14.00%
Indirect Cost	\$5,892	\$11,785	\$11,785	\$29,462
Subcontractor/Capital Expenditure				
Total Expenditures	\$47,980	\$95,959	\$95,959	\$239,898
HSA Revenues				
General Fund	\$47,980	\$95,959	\$95,959	\$239,898
Total HSA Revenue	\$47,980	\$95,959	\$95,959	\$239,898
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$47,980	\$95,959	\$95,959	\$239,898
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 5/10/18	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Budget	Budget	Budget
Community Social Worker, Olga Medvedko	\$73,000	1.00	13.70%	0.14	\$5,001	\$10,002	\$10,002	\$25,005
Activities Coordinator, Alexandra Whooley	\$44,720	0.33	48.75%	0.16	\$3,597	\$7,194	\$7,194	\$17,985
Social Worker, Vera DuBois	\$41,600	0.68	100.00%	0.68	\$14,144	\$28,288	\$28,288	\$70,720
Totals	\$159,320	2.01	162.45%	0.98	\$22,742	\$45,484	\$45,484	\$113,710
Fringe Benefits Rate	16.00%							
Employee Fringe Benefits	\$25,491				\$3,639	\$7,277	\$7,277	\$18,193
Total Salaries and Benefits	\$184,811				\$26,381	\$52,761	\$52,761	\$131,903
HSA #2	10/25/2016							

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)	\$4,500	\$9,000	\$9,000	\$22,500
Office Supplies, Postage	\$3,500	\$6,999	\$6,999	\$17,498
Building Maintenance Supplies and Repair	\$1,800	\$3,600	\$3,600	\$9,000
Printing and Reproduction	\$207	\$414	\$414	\$1,035
Insurance	\$4,500	\$9,000	\$9,000	\$22,500
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment				
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Performers, Speakers	\$800	\$1,600 #	\$1,600	\$4,000
Festivity enhancement, Cultural Supplies	\$400	\$800 #	\$800	\$2,000
Total Operating Expenses	\$15,707	\$31,413	\$31,413	\$78,533

HSA #3

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

SELF-HELP FOR THE ELDERLY

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Self-Help for the Elderly

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

In order to raise awareness of program services and locations, Grantee will attend and participate in multiple community fairs that occur each year in the City, including Aging Your Way, Sunday Streets, and the Chinese Lunar New Year Fair. Grantee will continue to organize its annual Longevity Walk-A-Thon to raise both awareness and funds for older adult programming. Grantee will continue its newspaper, radio, and TV media campaigns. Grantee will continue to utilize in-house transportation services to enhance access to their services, including a van shuttle service in the Visitation Valley neighborhood.

- 5) Adult Day Program and Alzheimer's Day Care Resource Center (ADCRC) – From January 1 through June 30, 2021, Grantee will provide non-medical day program services through an Adult Day Program currently licensed by the California Department of Social Services/Community Care Licensing. Services will be provided to functionally impaired adults and those with Alzheimer's disease or other dementia related disorders. Grantee will ensure services are provided by trained, competent staff. Services will include an individual plan of care in a structured comprehensive program that will provide a variety of social, psychological, and related support services. Services offered will typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL (Activities of Daily Living) and supportive counseling. Education on resources and respite are also provided to the participant families and caregivers. Additionally, Grantee will enlist volunteers to help with the provision of services. Due to social distancing guidelines and health orders related to COVID-19, most services are to be conducted virtually or telephonically. Units of service are measured by the number of hours spent to provide adult day program and ADCRC services.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For Community Services provided from January 1, 2021 to June 30, 2021:

- Grantee will serve 1,710 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 3,936 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 1,764 units of service of translation.
- Grantee will provide 2,496 units of service of social services.
- Grantee will provide 788 units of service of enhanced outreach.

For Community Services provided from July 1, 2021 to June 30, 2022:

- Grantee will serve 2,138 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 7,380 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 1,890 units of service of translation.
- Grantee will provide 3,120 units of service of social services.
- Grantee will provide 984 units of service of enhanced outreach.

For Community Services provided from July 1, 2022 to June 30, 2023:

- Grantee will serve 2,850 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 9,840 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 2,540 units of service of translation.
- Grantee will provide 3,120 units of service of social services.
- Grantee will provide 984 units of service of enhanced outreach.

For Adult Day Program and ADCRC services provided from January 1, 2021 to June 30, 2021:

- Grantee will serve 12 unduplicated Adult Day Program consumers.
- Grantee will service 13 unduplicated ADCRC consumers.
- Grantee will provide 7,160 Adult Day Program hours to consumers.
- Grantee will provide 7,076 ADCRC hours to consumers.
- Grantee will provide 6 caregiver support contacts.
- Grantee will provide 1 education session.
- Grantee will enlist 50 volunteers.
- Grantee will provide 500 volunteer hours.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

For Adult Day Program and ADCRC services provided from January 1 through June 30, 2021:

- At least 85% of survey respondents will indicate that the Adult Day Program has helped the participants remain safely in their current living/housing situation.
- At least 70% of participants enrolled in the Adult Day Program will avoid institutionalization as evidenced by participating in the program for at least 6 months from their date of enrollment.
- At least 85% of caregivers who participate in trainings will indicate that they are more aware of Alzheimer's and dementia related resources.
- At least 85% of caregivers surveyed report feeling less exhausted and isolated by the chronic stress of caregiving, and better able to attend to their own personal needs.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.

- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Reanna Albert
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 557-6693
reanna.albert@sfgov.org

or

Tahir Shaikh
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6085
tahir.shaikh@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name SELP-HELP FOR THE ELDERLY		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	1/1/21 - 6/30/23
Expenditures				Total
Salaries & Benefits	\$372,521	\$572,942	\$572,942	\$1,518,405
Operating Expenses	\$127,768	\$126,423	\$126,423	\$380,614
Subtotal	\$500,289	\$699,365	\$699,365	\$1,899,019
Indirect Percentage (%)	15%	15%	15%	15%
Indirect Cost	\$75,044	\$104,905	\$104,905	\$284,854
Subcontractor/Capital Expenditure				
Total Expenditures	\$575,333	\$804,270	\$804,270	\$2,183,873
HSA Revenues				
General Fund	\$575,333	\$804,270	\$804,270	\$2,183,873
Total HSA Revenue	\$575,333	\$804,270	\$804,270	\$2,183,873
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$575,333	\$804,270	\$804,270	\$2,183,873
Full Time Equivalent (FTE)				
Prepared by: Leny Nair	Telephone No.: 415-677-7682		Date: 11/16/2020	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	1/1/21 - 6/30/23
Director of Nutrition	\$90,000	1.00	30.00%	0.30	\$22,500	\$27,000	\$27,000	\$76,500
Community Outreach Worker	\$44,824	1.00	50.00%	0.50	\$11,206	\$22,412	\$22,412	\$56,030
Community Service Manager	\$56,000	1.00	100.00%	1.00	\$28,000	\$56,000	\$56,000	\$140,000
Nutrition Manager	\$70,000	1.00	17.00%	0.17	\$26,250	\$11,900	\$11,900	\$50,050
Outreach Activity Coordinator	\$45,000	1.00	100.00%	1.00	\$22,500	\$45,000	\$45,000	\$112,500
Program Supervisor	\$47,840	1.00	25.00%	0.25	\$23,920	\$11,960	\$11,960	\$47,840
Program Coordinator	\$47,840	1.00	65.00%	0.65	\$15,548	\$31,096	\$31,096	\$77,740
Center Coord. Supervisor	\$45,760	1.00	45.00%	0.45	\$10,296	\$20,592	\$20,592	\$51,480
Program Assistant	\$39,500	0.75	50.00%	0.38	\$7,406	\$14,813	\$14,813	\$37,032
Program Assistant	\$35,360	0.75	50.00%	0.38	\$6,630	\$13,260	\$13,260	\$33,150
Program Assistant	\$35,360	1.00	64.00%	0.64	\$11,315	\$22,630	\$22,630	\$56,575
Program Assistant	\$37,440	1.00	60.00%	0.60	\$11,232	\$22,464	\$22,464	\$56,160
Center Coord	\$37,440	1.00	31.50%	0.32	\$9,360	\$11,794	\$11,794	\$32,948
Center Coord	\$37,440	1.00	50.00%	0.50	\$9,360	\$18,720	\$18,720	\$46,800
Center Coord	\$37,440	1.00	37.50%	0.38	\$9,360	\$14,040	\$14,040	\$37,440
Center Coord	\$37,440	1.00	44.00%	0.44	\$9,360	\$16,474	\$16,474	\$42,308
Center Coord	\$37,440	1.00	50.00%	0.50	\$9,360	\$18,720	\$18,720	\$46,800
Center Coord	\$37,440	1.00	50.00%	0.50	\$9,360	\$18,720	\$18,720	\$46,800
Contracts Manager	\$55,120	1.00	10.00%	0.10	\$13,780	\$5,512	\$5,512	\$24,804
Mealsite Worker	\$35,360	1.00	50.00%	0.50	\$8,840	\$17,680	\$17,680	\$44,200
Center Coord	\$35,360	0.75	50.00%	0.38	\$6,630	\$13,260	\$13,260	\$33,150
Totals	\$945,404	20.25	1029.00%	9.92	\$282,213	\$434,047	\$434,047	\$1,150,307
Fringe Benefits Rate	32%							
Employee Fringe Benefits	\$302,529				\$90,308	\$138,895	\$138,895	\$368,098
Total Salaries and Benefits	\$575,332	80427000%	80427000%		\$372,521	\$572,942	\$572,942	\$1,518,405
HSA #2								10/25/2016

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: 11/16/2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>1/1/21 - 6/30/23</u>
Rental of Property	\$36,219	\$58,000	\$58,000	\$152,219
Utilities (Elec, Water, Gas, Phone, Garbage)	\$23,300	\$39,000	\$39,000	\$101,300
Office Supplies, Postage	\$2,624	\$1,000	\$1,000	\$4,624
Building Maintenance Supplies and Repair	\$2,500	\$3,000	\$3,000	\$8,500
Printing and Reproduction	\$1,500	\$2,000	\$2,000	\$5,500
Insurance	\$3,700	\$6,000	\$6,000	\$15,700
Staff Training	\$250	\$500	\$500	\$1,250
Staff Travel-(Local & Out of Town)	\$250	\$500	\$500	\$1,250
Rental of Equipment	\$250	\$349	\$349	\$948
<u>Consultant</u>				
Professional Fee	\$30,000			\$30,000
Curriculum & Translation Costs	\$10,000			\$10,000
Tai-chi at Jackie Chan SC	\$1,900			\$1,900
<u>Other</u>				
Program & Class Supplies	\$10,000	\$10,000	\$10,000	\$30,000
Vehicle Expenses	\$1,500	\$1,500	\$1,500	\$4,500
Communications	\$1,500	\$3,000	\$3,000	\$7,500
Vehicle Insurance	\$1,275	\$1,274	\$1,274	\$3,823
Recruitment Exp	\$1,000	\$300	\$300	\$1,600
Total Operating Expenses	\$127,768	\$126,423	\$126,423	\$380,614
HSA #3				10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

SEQUOIA LIVING

SAN FRANCISCO SENIOR CENTER – AQUATIC PARK

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Sequoia Living
HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Enhanced outreach will help grow participation and knowledge of the various components of the Community Services program. The strategy consists of four parts: tabling at community centers and libraries alongside the center's Aging and Disability Resource Center staff when it is safe to do so, use of social media platforms and email contact lists to share program information, partnering with other older adult serving agencies to administer programs and services, and engaging with nutrition consumers in the weekends, when their work week programs are closed.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory

requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 500 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 4,800 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 360 units of service of translation.
- Grantee will provide 480 units of service of social services.
- Grantee will provide 360 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 1,000 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 9,600 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 720 units of service of translation.
- Grantee will provide 960 units of service of social services.
- Grantee will provide 720 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.

- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

Or

Ella Lee
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6134
Ella.Lee@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Name		Term		
Sequoia Living		1/1/21-6/30/23		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Aquatic Park Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	Total
Expenditures				
Salaries & Benefits	\$135,348	\$260,913	\$260,913	\$657,174
Operating Expenses	\$70,675	\$21,320	\$21,320	\$113,315
Subtotal	\$206,023	\$282,233	\$282,233	\$770,489
Indirect Percentage (%)	15.00%	15.00%	15.00%	11.25%
Indirect Cost	\$30,904	\$42,335	\$42,335	\$115,574
Capital/Sub-Contractor Expenditure	\$5,058			\$5,058
Total DAS Expenditures	\$241,985	\$324,568	\$324,568	\$891,121
HSA Revenues				
General Fund	\$224,485	\$324,568	\$324,568	\$873,621
OTO	\$17,500			\$17,500
Total DAS Revenues	\$241,985	\$324,568	\$324,568	\$891,121
Other Revenues				
Total DAS and Non-DAS Revenues	\$241,985	\$324,568	\$324,568	\$891,121
Full Time Equivalent (FTE) _____				
Prepared by: _____				Date: 11/17/20
HSA-CO Review Signature: _____				
HSA #1				

Salaries & Benefits Detail

	Agency Totals		HSA Program		1/1/21-6/30/21	HSA Program			7/1/21-6/30/22	7/1/22-6/30/23	Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Budget	Budget
DAS Salary											
Service Coordination	\$67,475	0.65	100.00%	0.65	\$21,929	0.65	100.00%	0.65	\$43,859	\$43,859	\$109,647
Program Supervisor	\$69,992	0.24	100.00%	0.24	\$8,399	0.19	100.00%	0.19	\$13,298	\$13,298	\$34,995
Program Assisant	\$52,104	0.46	100.00%	0.46	\$12,049	0.46	100.00%	0.46	\$24,098	\$24,098	\$60,245
LWAW program assistane	\$52,104	0.46	100.00%	0.46	\$12,049	0.46	100.00%	0.46	\$24,098	\$24,098	\$60,245
Chinese Outreach Worker	\$48,797	0.80	100.00%	0.80	\$19,519	0.80	100.00%	0.80	\$39,038	\$39,038	\$97,595
Center Direct	\$84,406	0.48	100.00%	0.48	\$20,257	0.48	100.00%	0.48	\$40,515	\$40,515	\$101,287
LWAW data entry	\$38,230	0.22	100.00%	0.22	\$4,181	0.22	100.00%	0.22	\$8,363	\$8,363	\$20,907
Service Coordination	\$75,005	0.05	100.00%	0.05	\$1,875	1.00					\$1,875
Totals	\$488,113	3.36	800.00%	3.36	\$100,258	4.26	700.00%	3.26	\$193,269	\$193,269	\$486,796
Fringe Benefits Rate	35.00%										
Employee Fringe Benefits	\$170,840				\$35,090				\$67,644	\$67,644	\$170,378
Total DAS Salaries and Benefits	\$658,953				\$135,348				\$260,913	\$260,913	\$657,174

10/25/2016

HSA #2

Operating Expense Detail

DAS Operating Expenses	Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	Total
Expenditure Category					
Rental of Property		\$2,600	\$5,000	\$5,000	\$12,600
Utilities (Elec, Water, Gas, Phone, Garbage)		\$2,700	\$5,000	\$5,000	\$12,700
Office Supplies, Postage		\$4,035	\$6,820	\$6,820	\$17,675
Building Maintenance Supplies and Repair					
Printing and Reproduction		\$1,000	\$3,000	\$3,000	\$7,000
Insurance					
Staff Training		\$500	\$1,000	\$1,000	\$2,500
Staff Travel-(Local & Out of Town)		\$250	\$500	\$500	\$1,250
Rental of Equipment					
Consultant					
Web Design & Implementation		\$2,400			\$2,400
Higher Learning					
Utilities		\$3,328			\$3,328
Office Supplies, Postage		\$1,000			\$1,000
Rental of Property		\$3,000			\$3,000
Program Supplies		\$2,500			
LWAW Through Movement		\$3,060			\$3,060
Woman's Literature		\$4,250			\$4,250
Joy Through Movement		\$4,750			\$4,750
Lola's Act Club		\$2,678			\$2,678
Music Appreciation		\$5,200			\$5,200
Creative Writing		\$3,060			\$3,060
Painting and Drawing		\$3,349			\$3,349
Acting & Self-Expression		\$2,210			\$2,210
Chair Ballet Exercise		\$2,125			\$2,125
Teacher 1 (TBD)		\$3,060			\$3,060
Teacher 2 (TBD)		\$3,060			\$3,060
Teacher 3 (TBD)		\$3,060			\$3,060
Other					
Fall Prevention Classes and Events		\$7,500			\$7,500
Total DAS Operating Expenses					
		\$70,675	\$21,320	\$21,320	\$113,315
HSA #3					10/25/2016

Sub-contractor and Capital Expenditure Detail

	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	Total
<u>Subcontractor</u>				
Higher Learning JCC	\$5,058			\$5,058
Total Sub-Contractor Expenditure	\$5,058			\$5,058
<u>Equipment (Qty)</u>				
Total Equipment Cost				
<u>Remodeling</u>				
Total Remodeling Cost				
Total DAS Capital Expenditure	\$5,058			\$5,058
HSA #4				10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

SEQUOIA LIVING

SAN FRANCISCO SENIOR CENTER – DOWNTOWN

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Sequoia Living
HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Enhanced outreach will help grow participation and knowledge of the various components of the Community Services program. The strategy consists of four parts: tabling at community centers and libraries alongside the center's Aging and Disability Resource Center staff when it is safe to do so, use of social media platforms and email contact lists to share program information, partnering with other older adult serving agencies to administer programs and services, and engaging with nutrition consumers in the weekends, when their work week programs are closed.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory

requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 350 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,998 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 120 units of service of translation.
- Grantee will provide 391 units of service of social services.
- Grantee will provide 240 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 700 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 3,996 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 240 units of service of translation.
- Grantee will provide 782 units of service of social services.
- Grantee will provide 480 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.

- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

Or

Ella Lee
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6134
Ella.Lee@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name Sequoia Living		Term 1/1/21-6/30/23		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Downtown Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	Total
Expenditures				
Salaries & Benefits	\$127,015	\$264,704	\$198,179	\$589,898
Operating Expenses	\$8,728	\$6,780	\$12,436	\$27,944
Subtotal	\$135,743	\$271,484	\$210,615	\$617,842
Indirect Percentage (%)	15.00%	15.00%	15.00%	11.25%
Indirect Cost	\$20,361	\$40,723	\$31,592	\$92,676
Capital/Sub-Contractor Expenditure				
Total DAS Expenditures	\$156,104	\$312,207	\$242,207	\$710,518
HSA Revenues				
General Fund	\$121,104	\$242,207	\$242,207	\$605,518
OTO	\$35,000	\$70,000		\$105,000
Total DAS Revenues	\$156,104	\$312,207	\$242,207	\$710,518
Other Revenues				
Total DAS and Non-DAS Revenues	\$156,104	\$312,207	\$242,207	\$710,518
Full Time Equivalent (FTE) _____				
Prepared by: _____			Date: 11/17/20	
HSA-CO Review Signature: _____				
HSA #1				

Salaries & Benefits Detail

	Agency Totals		HSA Program		1/1/21-6/30/21	HSA Program			7/1/21-6/30/22	HSA Program			7/1/22-6/30/23	Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Budget
DAS Salary														
Service Coordination	\$75,005	0.65	100.00%	0.65	\$24,377	0.65	100.00%	0.65	\$48,753	0.65	100.00%	0.65	\$48,753	\$121,863
Program Supervisor	\$71,510	0.50	100.00%	0.50	\$17,876	0.45	100.00%	0.45	\$32,180	0.50	100.00%	0.50	\$35,755	\$85,813
Activity Assisiant	\$45,947	0.20	100.00%	0.20	\$4,595	0.45	100.00%	0.45	\$20,676	0.45	100.00%	0.45	\$20,676	\$45,947
Receptionist	\$38,771	0.12	100.00%	0.12	\$2,423	0.12	100.00%	0.12	\$4,846	0.12	100.00%	0.12	\$4,846	\$12,115
Outreach Work	\$48,797	0.20	100.00%	0.20	\$4,880	0.20	100.00%	0.20	\$9,759	0.20	100.00%	0.20	\$9,759	\$24,398
Center Direct	\$84,406	0.32	100.00%	0.32	\$13,505	0.32	100.00%	0.32	\$27,010	0.32	100.00%	0.32	\$27,010	\$67,525
LWAW program coordinator	\$52,853	1.00	100.00%	1.00	\$26,427	1.00	100.00%	1.00	\$52,853	1.00				\$79,280
Totals	\$417,289	2.99	700.00%	2.99	\$94,085	3.19	700.00%	3.19	\$196,077	3.24	600.00%	2.24	\$146,799	\$436,961
Fringe Benefits Rate	35.00%													
Employee Fringe Benefits	\$146,051				\$32,930				\$68,627				\$51,380	\$152,937
Total DAS Salaries and Benefits	\$563,340				\$127,015				\$264,704				\$198,179	\$589,898

10/25/2016

HSA #2

Operating Expense Detail

DAS Operating Expenses	Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	Total
<u>Expenditure Category</u>					
Rental of Property			\$1,000	\$2,000	\$3,000
Utilities (Elec, Water, Gas, Phone, Garbage)		\$2,500	\$1,280	\$2,000	\$5,780
Office Supplies, Postage		\$2,728	\$2,500	\$2,436	\$7,664
Building Maintenance Supplies and Repair					
Printing and Reproduction		\$1,000	\$1,000	\$1,000	\$3,000
Insurance					
Staff Training		\$500			\$500
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
Program Supplies		\$2,000	\$1,000	\$2,000	\$5,000
Security				\$3,000	\$3,000
<u>Consultant</u>					
<u>Other</u>					
Total DAS Operating Expenses		\$8,728	\$6,780	\$12,436	\$27,944

HSA #3

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

SOUTHWEST COMMUNITY CORP

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Southwest Community Corp

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Grantee will provide a culturally appropriate food assistance program for the purpose of engaging with the District 11 community. The meal program will provide a variety of offerings that meet the cultural and nutritional needs of the participants.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 63 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 600 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 25 units of service of translation.
- Grantee will provide 200 units of service of social services.
- Grantee will provide 50 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 125 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,200 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 50 units of service of translation.
- Grantee will provide 400 units of service of social services.
- Grantee will provide 100 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5597
Patrick.Gracia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name SouthWest Community Corp		Term Jan 2021 - Jun 2023		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$68,450	\$136,900	\$136,900	\$342,250
Operating Expenses	\$131,649	\$89,384	\$89,384	\$310,417
Subtotal	\$200,099	\$226,284	\$226,284	\$652,667
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$30,015	\$33,943	\$33,943	\$97,901
Subcontractor/Capital Expenditure				
Total Expenditures	\$230,114	\$260,227	\$260,227	\$750,568
HSA Revenues				
General Fund	\$130,114	\$260,227	\$260,227	\$650,568
OTO 20/21 (Nutrition)	\$100,000			\$100,000
Total HSA Revenue	\$230,114	\$260,227	\$260,227	\$750,568
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$230,114	\$260,227	\$260,227	\$750,568
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 11/19/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	
Executive Director	\$85,000	1.00	50.00%	0.50	\$21,250	\$42,500	\$42,500	\$106,250
Program Manager	\$45,760	0.75	100.00%	0.75	\$17,160	\$34,320	\$34,320	\$85,800
Program Assistant/Facilities	\$35,360	0.75	50.00%	0.38	\$6,630	\$13,260	\$13,260	\$33,150
Program Assistant/Translator	\$38,880	0.50	100.00%	0.50	\$9,720	\$19,440	\$19,440	\$48,600
Totals	\$205,000	3.00	300.00%	2.13	\$54,760	\$109,520	\$109,520	\$273,800
Fringe Benefits Rate	25.00%							
Employee Fringe Benefits	\$51,250				\$13,690	\$27,380	\$27,380	\$68,450
Total Salaries and Benefits	\$256,250				\$68,450	\$136,900	\$136,900	\$342,250
HSA #2								10/25/2016

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rent		\$14,400	\$14,400	\$28,800
Utilities	\$15,000	\$30,000	\$30,000	\$75,000
Office Supplies	\$99	\$5,000	\$5,000	\$10,099
Building Maintenance		\$3,000	\$3,000	\$6,000
Printing and Reproduction		\$1,500	\$1,500	\$3,000
Insurance (Bus, Liab, E&O)				
Workers Comp				
Staff Travel-(Local & Out of Town)		\$2,400	\$2,400	\$4,800
Rental of Equipment (Copier)	\$2,050	\$4,084	\$4,084	\$10,218
Delivery Fuel	\$5,000			\$5,000
Kitchen Prep (Wares/Togo)	\$30,000			\$30,000
Consultant				
Driver	\$20,000			\$20,000
Sous Chef	\$30,000			\$30,000
Custodian	\$15,000			\$15,000
Accounting	\$2,000	\$4,000	\$4,000	\$10,000
Other				
Senior Health/Brain (Soulphony)	\$10,000	\$20,000	\$20,000	\$50,000
Senior Health/ Low (Storytelling)	\$800	\$1,600	\$1,600	\$4,000
Senior Health/Mod (QiGong)	\$800	\$1,600	\$1,600	\$4,000
Senior Health/High (Line)	\$800	\$1,600	\$1,600	\$4,000
Fitness Supplies	\$100	\$200	\$200	\$500
Total Operating Expenses	\$131,649	\$89,384	\$89,384	\$310,417

HSA #3

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED
YMCA OF SAN FRANCISCO - CHINATOWN
COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	YMCA of San Francisco - Chinatown

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For Community Services provided from January 1, 2021 to June 30, 2021:

- Grantee will serve 50 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 175 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 38 units of service of translation.
- Grantee will provide 0 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For Community Services provided from July 1, 2021 to June 30, 2022:

- Grantee will serve 100 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 350 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 75 units of service of translation.
- Grantee will provide 0 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

For Community Services provided from July 1, 2022 to June 30, 2023:

- Grantee will serve 100 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 350 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 75 units of service of translation.
- Grantee will provide 0 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Reanna Albert
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 557-6693
reanna.albert@sfgov.org

or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-6693
patrick.garcia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name YMCA	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services, Chinatown				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$17,052	\$30,264	\$31,475	\$78,791
Operating Expenses	\$1,768	\$7,376	\$6,165	\$15,309
Subtotal	\$18,820	\$37,640	\$37,640	\$94,100
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$2,823	\$5,646	\$5,646	\$14,115
Subcontractor/Capital Expenditure				
Total Expenditures	\$21,643	\$43,286	\$43,286	\$108,215
HSA Revenues				
General Fund	\$21,643	\$43,286	\$43,286	\$108,215
Total HSA Revenue	\$21,643	\$43,286	\$43,286	\$108,215
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$21,643	\$43,286	\$43,286	\$108,215
Full Time Equivalent (FTE)				
Prepared by: _____	Telephone No.: _____		Date: 11/19/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Program Coordinator	\$49,920	1.00	25.00%	0.25	\$5,760	\$12,480	\$12,979	\$31,219
Group Ex Instructors	\$83,200	0.50	5.00%	0.03	\$5,200	\$6,240	\$6,490	\$17,930
Translation Services	\$52,000	1.00	20.00%	0.20	\$3,250	\$6,500	\$6,760	\$16,510
Totals	\$185,120	2.50	50.00%	0.48	\$14,210	\$25,220	\$26,229	\$65,659
Fringe Benefits Rate	20.00%							
Employee Fringe Benefits	\$37,024				\$2,842	\$5,044	\$5,246	\$13,132
Total Salaries and Benefits	\$222,144				\$17,052	\$30,264	\$31,475	\$78,791
HSA #2								10/25/2016

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)				
Office Supplies, Postage	\$200	\$300	\$65	\$565
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment				
<u>Consultant</u>				
<u>Other</u>				
Food	\$900	\$1,800	\$1,800	\$4,500
Program Supplies	\$668	\$500	\$500	\$1,668
Entrance Fees		\$1,526	\$800	\$2,326
Bus Rental		\$3,250	\$3,000	\$6,250
Total Operating Expenses	\$1,768	\$7,376	\$6,165	\$15,309
HSA #3				10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

YMCA SAN FRANCISCO - MISSION

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	YMCA San Francisco

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.

- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 250 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,296 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 75 units of service of translation.
- Grantee will provide 325 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 500 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 2,592 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 150 units of service of translation.
- Grantee will provide 650 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

Or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5597
Patrick.Gracia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Title YMCA	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services, Mission				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$40,723	\$81,446	\$81,446	\$203,615
Operating Expenses				
Subtotal	\$40,723	\$81,446	\$81,446	\$203,615
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$6,109	\$12,218	\$12,218	\$30,545
Subcontractor/Capital Expenditure				
Total Expenditures	\$46,832	\$93,664	\$93,664	\$234,160
HSA Revenues				
General Fund	\$46,832	\$93,664	\$93,664	\$234,160
Total HSA Revenue	\$46,832	\$93,664	\$93,664	\$234,160
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$46,832	\$93,664	\$93,664	\$234,160
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 11/19/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
AOA Coordinator (Luis Hernandez)	\$45,760	1.00	39.85%	0.25	\$11,489	\$22,978	\$22,978	\$57,445
Sr. Director (Christy Wagnon)	\$90,000	1.00	13.11%	0.13	\$11,802	\$23,604	\$23,604	\$59,010
Executive Director (Marissa Cowan)	\$120,000	1.00	3.96%	0.04	\$4,748	\$9,496	\$9,496	\$23,740
Director of Programs (Shak Karim)	\$66,000	1.00	5.32%	0.05	\$3,511	\$7,022	\$7,022	\$17,555
Director of Family Engagement (Karla Diaz)	\$68,000	1.00	3.30%	0.03	\$2,241	\$4,482	\$4,482	\$11,205
Program Staff (Deja Spell)	\$37,400	1.00	1.54%	0.01	\$289	\$578	\$578	\$1,445
Totals	\$427,160	6.00	67.08%	0.51	\$34,080	\$68,160	\$68,160	\$170,400
Fringe Benefits Rate	19.00%							
Employee Fringe Benefits	\$81,160				\$6,643	\$13,286	\$13,286	\$33,215
Total Salaries and Benefits	\$508,320				\$40,723	\$81,446	\$81,446	\$203,615

HSA #2

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

YMCA SAN FRANCISCO – PARK MERCED

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	YMCA San Francisco

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

The Parkmerced Senior Program by the Stonestown Family YMCA will conduct flier distribution, tabling at local events, and facilitate word of mouth recommendations by current participating clients. YMCA staff will ensure that flier communications are dropped off at local agencies and locations where older adults congregate (libraries, banks, other community centers, etc.). Staff will attend local farmer's markets which provides a great opportunity to outreach to new older adults who may need our services. Other tools such as Stonestown Family YMCA's website, Parkmerced website and communication outlets, social media (e.g. Facebook, Instagram, and Twitter) and email are also utilized to reach older adults who have access to these platforms.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the

Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 63 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 325 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 38 units of service of translation.
- Grantee will provide 50 units of service of social services.
- Grantee will provide 50 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 125 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 650 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 75 units of service of translation.
- Grantee will provide 100 units of service of social services.
- Grantee will provide 100 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their

lives.

- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

Or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5597
Patrick.Gracia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name YMCA	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services, Parkmerced				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$33,518	\$67,036	\$67,036	\$167,590
Operating Expenses	\$68	\$136	\$136	\$340
Subtotal	\$33,586	\$67,172	\$67,172	\$167,930
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$5,039	\$10,078	\$10,078	\$25,195
Subcontractor/Capital Expenditure				
Total Expenditures	\$38,625	\$77,250	\$77,250	\$193,125
HSA Revenues				
General Fund	\$38,625	\$77,250	\$77,250	\$193,125
Total HSA Revenue	\$38,625	\$77,250	\$77,250	\$193,125
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$38,625	\$77,250	\$77,250	\$193,125
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 11/19/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

YMCA (Stonestown Family YMCA)	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Program Director	\$85,424	1.00	20.00%	0.20	\$8,542	\$17,085	\$17,085	\$42,712
Program Coordinator	\$66,186	1.00	42.34%	0.42	\$14,012	\$28,023	\$28,023	\$70,058
Food Pantry Support	\$36,800	0.20	25.97%	0.05	\$1,911	\$3,822	\$3,822	\$9,555
Totals	\$188,410	2.20	88.31%	0.68	\$24,465	\$48,930	\$48,930	\$122,325
Fringe Benefits Rate	37.00%							
Employee Fringe Benefits	\$69,712				\$9,053	\$18,106	\$18,106	\$45,265
Total Salaries and Benefits	\$258,122				\$33,518	\$67,036	\$67,036	\$167,590
HSA #2								10/25/2016

Program: Community Services, Parkmerced
 (Same as Line 11 on HSA #1)

Operating Expense Detail

	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
<u>Expenditure Category</u>				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment				
<u>Consultant</u>				
Consultant A				
<u>Other</u>				
Program Subscriptions	\$68	\$136	\$136	\$340
Total Operating Expenses	\$68	\$136	\$136	\$340

HSA #3

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

YMCA SAN FRANCISCO – RICHMOND

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	YMCA San Francisco

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts will not be provided under this specific grant.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 50 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 240 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 0 units of service of translation.
- Grantee will provide 38 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 100 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 480 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 0 units of service of translation.
- Grantee will provide 75 units of service of social services.
- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

Or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5597
Patrick.Gracia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name YMCA	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services, Richmond				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$32,728	\$65,456	\$65,456	\$163,640
Operating Expenses	\$2,216	\$4,433	\$4,433	\$11,082
Subtotal	\$34,944	\$69,889	\$69,889	\$174,722
Indirect Percentage (%)	13.00%	13.00%	13.00%	13.00%
Indirect Cost	\$4,543	\$9,086	\$9,086	\$22,715
Subcontractor/Capital Expenditure				
Total Expenditures	\$39,487	\$78,974	\$78,974	\$197,435
HSA Revenues				
General Fund	\$39,487	\$78,974	\$78,974	\$197,435
Total HSA Revenue	\$39,487	\$78,974	\$78,974	\$197,435
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$39,487	\$78,974	\$78,974	\$197,435
Full Time Equivalent (FTE)				
Prepared by:	Telephone No.:		Date: 11/19/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Senior Director of Engagement	\$85,812	1.00	25.00%	0.25	\$10,727	\$21,453	\$21,453	\$53,633
AOA Lead Staff	\$43,056	1.00	50.00%	0.50	\$10,764	\$21,528	\$21,528	\$53,820
Chair Yoga Instructor	\$37,198	0.50	24.00%	0.12	\$2,232	\$4,464	\$4,464	\$11,160
AOA Strength Instructor	\$63,710	1.00	4.50%	0.05	\$1,433	\$2,867	\$2,867	\$7,167
Totals	\$229,776	3.50	103.50%	0.92	\$25,156	\$50,312	\$50,312	\$125,780
Fringe Benefits Rate	30.10%							
Employee Fringe Benefits	\$69,163				\$7,572	\$15,144	\$15,144	\$37,860
Total Salaries and Benefits					\$32,728	\$65,456	\$65,456	\$163,640
HSA #2								10/25/2016

Program: Community Services, Richmond
 (Same as Line 11 on HSA #1)

Appendix B, Page 3
 Document Date: December 2020

Operating Expense Detail

<u>Expenditure Category</u>	<u>1/1/21 - 6/30/21</u>	<u>7/1/21 - 6/30/22</u>	<u>7/1/22 - 6/30/23</u>	<u>Total</u>
Rental of Property				
Utilities (Elec, Water, Gas, Phone, Garbage)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment				
<u>Consultant</u>				
Consultant A				
<u>Other</u> #				
Food Delivery Vehicle Maintenance	1,000.00	1,001.00	1,001.00	\$3,002
Program Supplies	1,216.00	1,432.00	1,432.00	\$4,080
Food & Beverage		2,000.00	2,000.00	\$4,000
Total Operating Expenses	\$2,216	\$4,433	\$4,433	\$11,082

HSA #3

10/25/2016

APPENDIX A – SERVICES TO BE PROVIDED

YMCA SAN FRANCISCO – STONESTOWN

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities through site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	YMCA San Francisco

HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
OCP	Office of Community Partnerships (Previously Office on the Aging/OOA)
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique participant receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above or
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of participants. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Activities and services may be provided in the Grantee's Community Center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

There are four categories of services:

- 1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning.
- 2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

- 3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- 4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach efforts under this specific grant are summarized as follows:

The Stonestown Family Active Adult (Senior) Program will conduct flier distribution, tabling at local events, and facilitate word of mouth recommendations by current participating clients. YMCA staff will ensure that flier communications are dropped off at local agencies and locations where older adults congregate (libraries, banks, other community centers, etc.). Staff will attend local farmer's markets which provides a great opportunity to outreach to new older adults who may need our services. Other tools such as Stonestown Family YMCA's website, social media (e.g. Facebook, Instagram, and Twitter) and email are also utilized to reach older adults who have access to these platforms.

VII. Contractor Responsibilities

Services should be provided according to Office of Community Partnerships / Office on the Aging Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual participants.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual participant survey, pre-approved by the Office of Community Partnerships staff, to consumers with a response rate of at least 35% of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

***Grantee shall continue to follow guidance in or instructions from health care providers, the

Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VIII. Service Objectives

For the period January 1, 2021 – June 30, 2021:

- Grantee will serve 1,000 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 1,500 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 60 units of service of translation.
- Grantee will provide 500 units of service of social services.
- Grantee will provide 50 units of service of enhanced outreach.

On an annual basis starting July 1, 2021:

- Grantee will serve 2,000 unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide 3,000 units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide 120 units of service of translation.
- Grantee will provide 1,000 units of service of social services.
- Grantee will provide 100 units of service of enhanced outreach.

IX. Outcome Objectives

- 80% of participants surveyed will receive the services and/or activities they need from the agency.
- 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their

lives.

- 80% of participants surveyed will increase their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. This report must be submitted to the CARBON system.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- J. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- K. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
(415) 355-3551
Paulo.Salta@sfgov.org

Or

Patrick Garcia
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
(415) 557-5597
Patrick.Gracia@sfgov.org

XI. 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 that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for

selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name YMCA	Term Jan 2021 - Jun 2023			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
Program: Community Services, Stonestown Family				
Budget Reference Page No.(s) _____				
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Expenditures				
Salaries & Benefits	\$92,751	\$185,502	\$185,502	\$463,755
Operating Expenses	\$35,914	\$13,668	\$13,668	\$63,250
Subtotal	\$128,665	\$199,170	\$199,170	\$527,005
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$19,524	\$29,873	\$29,873	\$79,270
Subcontractor/Capital Expenditure				
Total Expenditures	\$148,189	\$229,043	\$229,043	\$606,275
HSA Revenues				
General Fund	\$138,189	\$229,043	\$229,043	\$596,275
OTO 20/21 (Taiko program)	\$10,000			\$10,000
Total HSA Revenue	\$148,189	\$229,043	\$229,043	\$606,275
Other Revenues				
TOTAL DAS AND NON DAS REVENUE	\$148,189	\$229,043	\$229,043	\$606,275
Full Time Equivalent (FTE)				
Prepared by: _____	Telephone No.: _____		Date: 11/19/20	
HSA-CO Review Signature: _____				
HSA #1				10/25/2016

Salaries & Benefits Detail

YMCA (Stonestown Family YMCA)	Agency Totals		HSA Program		DAS budgeted salary			
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
Program Director	\$85,424	1.00	75.00%	0.75	\$32,034	\$64,068	\$64,068	\$160,170
Program Coordinator	\$66,186	1.00	54.82%	0.55	\$18,140	\$36,280	\$36,280	\$90,700
Analyst	\$43,680	1.00	100.00%	1.00	\$19,620	\$39,240	\$39,240	\$98,100
Group Ex	\$97,760	1.00	6.68%	0.07	\$6,530	\$13,060	\$13,060	\$32,650
Totals	\$293,050	4.00	236.50%	2.37	\$76,324	\$152,648	\$152,648	\$381,620
Fringe Benefits Rate	21.00%				21.00%	21.00%	21.00%	
Employee Fringe Benefits	\$61,541				\$16,427	\$32,854	\$32,854	\$82,135
Total Salaries and Benefits	\$354,591				\$92,751	\$185,502	\$185,502	\$463,755
HSA #2								10/25/2016

Program: Community Services, Stonestown Family
 (Same as Line 11 on HSA #1)

Operating Expense Detail

Name Parkmerced YMCA (Stonestown Family YMCA)	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
<u>Expenditure Category</u>				
Rental of Property	#			
Utilities (Elec, Water, Gas, Phone, Garbage)	#			
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Staff Training				
Staff Travel-(Local & Out of Town)				
Rental of Equipment				
<u>Consultant</u>				
Higher Education Learning	\$20,580			\$20,580
<u>Other</u>				
Program Subscriptions	\$24	\$48	\$48	\$120
Food and Beverage	\$44	\$88	\$88	\$220
Program Supplies	# \$5,550	\$11,100	\$11,100	\$27,750
Phone Service	\$1,216	\$2,432	\$2,432	\$6,080
Taiko Drumming	\$8,500			\$8,500
Total Operating Expenses	\$35,914	\$13,668	\$13,668	\$63,250
HSA #3				10/25/2016