

## City and County of San Francisco



London Breed, Mayor

## Human Services Agency

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

Trent Rhorer, Executive Director

## MEMORANDUM

**TO:** AGING & ADULT SERVICES COMMISSION

**THROUGH:** SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

**FROM:** CINDY KAUFFMAN, DEPUTY DIRECTOR  
 ESPERANZA ZAPIEN, ACTING DIRECTOR OF CONTRACTS <sup>DS</sup> *EL*

**DATE:** DECEMBER 2, 2020

**SUBJECT:** NEW GRANTS: **MULTIPLE GRANTEES (NON-PROFIT)** FOR THE  
 PROVISION OF LEGAL SERVICES FOR YOUNGER ADULTS WITH  
 DISABILITIES  
 (see table on the next page)

**GRANT TERMS:** 1/1/21-6/30/24

**GRANT AMOUNTS:** \$1,327,708

<b>FUNDING SOURCE</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>ANNUAL AMOUNT</b>	\$902,841		\$424,867	\$132,771	\$1,460,478
<b>PERCENTAGE</b>	68%		32%		100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with multiple providers for the provision of legal services for younger adults with disabilities during the period of January 1, 2021 through June 30, 2024, in the combined amount of \$1,327,708 plus a 10% contingency for a total not to exceed amount of \$1,460,478. The specific breakdown of funding per grantee is summarized in the following table.

Grantee	1/1/21-6/30/21	Annual	Annual x3	Total	10% Contingency	Total Not to Exceed
Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)	\$56,500	\$113,000	\$339,000	\$395,500	\$39,550	\$435,050
Independent Living Resource Center of San Francisco	\$74,589	\$149,178	\$447,534	\$522,123	\$52,212	\$574,335
La Raza Centro Legal	\$16,084	\$31,167	\$96,501	\$112,585	\$11,258	\$123,843
Legal Assistance to the Elderly	\$22,500	\$45,000	\$135,000	\$157,500	\$15,750	\$173,250
Open Door Legal	\$20,000	\$40,000	\$120,000	\$140,000	\$14,000	\$154,000
<b>Total</b>	<b>\$189,673</b>	<b>\$379,345</b>	<b>\$1,138,035</b>	<b>\$1,327,708</b>	<b>\$132,771</b>	<b>\$1,460,478</b>

### Background

Legal services can be critical to maintaining or securing a better quality of life for adults with disabilities. DAS' legal service providers work to provide their clients with information and advice designed to allow them to make informed decisions and assert their rights on a variety of issues. Legal service program providers help eligible clients with a variety of legal issues which may include public benefit eligibility determinations and appeals, housing rights and eviction prevention, consumer fraud and debt collection issues, elder abuse prevention, simple will preparation, disability planning and advance directives, and immigration matters.

### Services to be Provided

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

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

1. Information and Referral – the client concern is more appropriately referred to another service for assistance.
2. Advise and Close – the client issue is very easily addressed, advice is provided and the case is closed.
3. Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.

4. Case Acceptance – the client issue warrants more extensive legal representation and a case file is opened, e.g. elder abuse, consumer fraud, reasonable accommodation for housing, etc.

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

### **Coronavirus Pandemic and Impact on Services**

At the implementation of the City's shelter-in-place order in March 2020, DAS legal service providers halted all in-office operations, shifting services to phone and virtual options. This remains the preferred and primary mode of service delivery among DAS funded legal service providers. With the development of public health guidance on safe operations for staff and clients, legal service providers now offer limited instances of in-office services when alternatives are not available. These in-office operations utilize office technology to connect clients virtually to staff (located elsewhere in the office or off-site) or use of physical barriers and restricted staffing on site for socially distanced transactions. While client utilization of services dropped off initially, it has steadily grown through the remainder of 2020. Looking forward, DAS legal services are expected to be near or at pre-COVID service levels in terms of clients served and legal service hours provided.

### **Grantee Selections**

Grantees were selected through Request for Proposals (RFP) 865, Legal Services for Adults with Disabilities, which was competitively bid in January 2020.

### **Funding**

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

### **ATTACHMENTS**

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

Appendix A- Services to be Provided

Appendix B- Program Budget

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

Appendix A- Services to be Provided

Appendix B- Program Budget

#### **La Raza**

Appendix A- Services to be Provided

Appendix B- Program Budget

#### **Legal Assistance to the Elderly**

Appendix A- Services to be Provided

Appendix B- Program Budget

#### **Open Door Legal**

Appendix A- Services to be Provided

Appendix B- Program Budget

**APPENDIX A**

***API LEGAL OUTREACH***

**LEGAL SERVICES FOR YOUNGER ADULTS WITH DISABILITIES**

**January 1, 2021 – June 30, 2024**

**I. Purpose**

The purpose of this grant is to ensure the rights and entitlements of younger adults with disabilities (ages 18-59) by providing legal assistance.

**II. Definitions**

California State Bar The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.

CARBON Contracts Administration, Reporting, and Billing Online System

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 API Legal Outreach

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to adults with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;

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

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 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.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

Services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income

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

#### **IV. Eligibility for Services**

- 1) A resident of San Francisco *and*
- 2) Aged 18-59 living with a disability

#### **V. Location and Time of Services**

API Legal Outreach's offices are located at 1121 Mission Street in San Francisco. Services are offered Monday through Friday during regular business hours.

#### **VI. Description of Services**

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

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

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

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

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

- 1) Income/Nutrition: Supplemental Security Income (SSI), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment

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

Clients can expect that the legal service provider is experienced and knowledgeable about working with people with disabilities. Grantee is expected to keep up with changes in the law that affect people with disabilities and particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

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

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

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

\*\*\*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 the COVID-19 pandemic. 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.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve **30** unduplicated clients.

- Grantee will provide 750 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, beginning July 1, 2021:

- Grantee will serve 61 unduplicated clients.
- Grantee will provide 1,500 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

### **VIII. Outcome Objectives**

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance)
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance)
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year



## IX. Additional Reporting Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- G. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- H. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- I. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102

Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

- J. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

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 Program Analyst, Office of Community Partnerships  
 DAS  
 P.O. Box 7988  
 San Francisco, CA 94120-7988  
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 PO Box 7988  
 San Francisco, CA 94120-7988  
 (415) 557-6335  
[Steve.Kim@sfgov.org](mailto:Steve.Kim@sfgov.org)

## X. Monitoring Activities

- A. **Program Monitoring:** Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

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

A	B	C	D	E	F
Appendix B, Page 1					
<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
1	Name _____ Term _____				
2	API Legal Outreach (dba of Nihonmachi Legal Outreach)				
3	January 1, 2021 to June 30, 2024				
4	6	(Check One) New <input checked="" type="checkbox"/> Renewal _____ Modification _____			
5	7	Effective Date of Mod. No. of Mod.			
6	<b>Program: Legal Services for Adults With Disabilities</b>				
7	10	Budget Reference Page No.(s)	Total		
8	11	Program Term	7/1/21-6/30/21	7/1/22-6/30/23	7/1/23-6/30/24
9	12	Expenditures	\$42,520	\$85,039	\$85,039
10	13	Salaries & Benefits	\$6,600	\$13,225	\$13,225
11	14	Operating Expenses	\$49,120	\$98,264	\$98,264
12	15	Subtotal	15%	15%	15%
13	16	Indirect Percentage (%)	\$7,380	\$14,736	\$14,736
14	17	Indirect Cost (Line 16 X Line 15)	\$0	\$0	\$0
15	18	Capital/Subcontractor Expenditures	\$56,500	\$113,000	\$113,000
16	19	Total Expenditures			
17	20	HSA Revenues			
18	21	General Fund/(ALLOC UNKNOWN)	\$56,500	\$113,000	\$113,000
19	22	CFDA 93.044 (ALLOC UNKNOWN)			
20	23				
21	24				
22	25				
23	26				
24	27				
25	28				
26	29	TOTAL HSA REVENUES	\$56,500	\$113,000	\$113,000
27	30	Other Revenues			
28	31				
29	32				
30	33				
31	34				
32	35	Total Revenues	\$56,500	\$113,000	\$113,000
33	36				
34	37	Full Time Equivalent (FTE)	0.53	1.05	1.05
35	38				
36	39	Prepared by: Dean Ito Taylor/Lorraine Yos Telephone No.:	510-251-2846 x 140		10/2/2020
37	40	HSA-CO Review Signature:			
38	41	HSA #1			8/27/2020





**APPENDIX A**

**INDEPENDENT LIVING RESOURCE CENTER SAN FRANCISCO  
LEGAL SERVICES FOR YOUNGER ADULTS WITH DISABILITIES**

**January 1, 2021 – June 30, 2024**

**I. Purpose**

The purpose of this grant is to ensure the rights and entitlements of younger adults with disabilities (ages 18-59) by providing legal assistance.

**II. Definitions**

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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 (ILRCSF)

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to adults with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;

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

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 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.
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.
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### III. Target Population

Services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income



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

#### **IV. Eligibility for Services**

- 1) A resident of San Francisco *and*
- 2) Aged 18-59 living with a disability

#### **V. Location and Time of Services**

ILRCSF's offices are located at 825 Howard Street, San Francisco. Services are offered Monday through Friday during regular business hours.

#### **VI. Description of Services**

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

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

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

- 1) Income/Nutrition: Supplemental Security Income (SSI), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment

- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
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## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve 75 unduplicated clients.

- Grantee will provide **800** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, beginning July 1, 2021:

- Grantee will serve **150** unduplicated clients.
- Grantee will provide **1600** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

### **VIII. Outcome Objectives**

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance)
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance)
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year

## IX. Additional Reporting Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- G. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- H. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- I. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
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Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102

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Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

- J. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Ofelia Trevino  
 Program Analyst, Office of Community Partnerships  
 DAS  
 P.O. Box 7988  
 San Francisco, CA 94120-7988  
[Ofelia.Trevino@sfgov.org](mailto:Ofelia.Trevino@sfgov.org)

and

Steve Kim  
 Contract Manager  
 Human Services Agency  
 PO Box 7988  
 San Francisco, CA 94120-7988  
 (415) 355-3607  
[Steve.Kim@sfgov.org](mailto:Steve.Kim@sfgov.org)

## X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

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

	A	B	C	D	E	F	G
1	Appendix B-1, Page 1						
2	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>						
3							
4							
5	Name		Term				
6	Independent Living Resource Center of San Francisco		1/1/2021-6/30/2024				
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
8	If modification, Effective Date of Mod.		No. of Mod.				
9	Program: YAD Legal Services						
10	Budget Reference Page No.(s)						
11	Program Term		1/1/2021-6/30/2021	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/2021-6/30/2024
12	<b>Expenditures</b>						
13	Salaries & Benefits		\$43,722	\$87,444	\$87,444	\$87,444	\$306,054
14	Operating Expenses		\$21,138	\$42,276	\$42,276	\$42,276	\$147,966
15	<b>Subtotal</b>		\$64,860	\$129,720	\$129,720	\$129,720	\$194,580
16	Indirect Percentage (%)		15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)		\$9,729	\$19,458	\$19,458	\$19,458	\$29,187
18	Capital/Subcontractor Expenditures		\$0	\$0	\$0	\$0	\$0
19	<b>Total Expenditures</b>		\$74,589	\$149,178	\$149,178	\$149,178	\$522,123
20	<b>HSA Revenues</b>						
21							
22	General Fund		\$74,589	\$149,178	\$149,178	\$149,178	\$522,123
23							
24							
25							
26							
27							
28							
29	<b>TOTAL HSA REVENUES</b>		\$74,589	\$149,178	\$149,178	\$149,178	\$522,123
30	<b>Other Revenues</b>						
31							
32							
33							
34							
35							
36	<b>Total Revenues</b>		\$74,589	\$149,178	\$149,178	\$149,178	\$74,589
37	Full Time Equivalent (FTE)		0.98				0.98
39	Prepared by: Jerome Lourme		Telephone No.: 415-543-6222				
40	HSA-CO Review Signature: _____						
41	HSA #1						10/29/2020





	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3										
4	Program: YAD Legal Services									
5	(Same as Line 9 on HSA #1)									
6										
7	<b>Operating Expense Detail</b>									
8										
9										
10										
11										
12	Expenditure Category	TERM	1/1/2021- 6/30/2021	7/1/21- 6/30/22	7/1/22- 6/30/23	7/1/23- 6/30/24	TOTAL 1/1/2021- 6/30/2024			
13	Rental of Property		\$8,890	\$17,780	\$17,780	\$17,780	\$62,230			
14	Utilities (Elec, Water, Gas, Phone, Garbage, Janitorial)		\$1,960	\$3,920	\$3,920	\$3,920	\$13,720			
15	Office Supplies, Postage		\$2,067	\$4,134	\$4,134	\$4,134	\$14,469			
16	Building Maintenance Supplies and Repair		\$415	\$830	\$830	\$830	\$2,905			
17	Printing and Reproduction		\$150	\$300	\$300	\$300	\$1,050			
18	Insurance		\$4,361	\$8,722	\$8,722	\$8,722	\$30,527			
19	Staff Training			\$0	\$0	\$0	\$0			
20	Staff Travel-(Local & Out of Town)		\$400	\$800	\$800	\$800	\$2,800			
21	Rental of Equipment		\$228	\$456	\$456	\$456	\$1,596			
22										
23	<b>CONSULTANTS</b>									
24	Translation Services		\$250	\$500	\$500	\$500	\$1,750			
25	IT Services		\$440	\$880	\$880	\$880	\$3,080			
26	Other Miscellaneous Shared Services		\$59	\$118	\$118	\$118	\$413			
27										
28	<b>OTHER</b>									
29	Dues and Subscriptions		\$1,893	\$3,786	\$3,786	\$3,786	\$13,251			
30	Food for client meetings		\$25	\$50	\$50	\$50	\$175			
31										
32	<b>TOTAL OPERATING EXPENSE</b>		<b>\$21,138</b>	<b>\$42,276</b>	<b>\$42,276</b>	<b>\$42,276</b>	<b>\$147,966</b>			
33										
34	HSA #3									

10/29/2020

**APPENDIX A**

**LA RAZA CENTRO LEGAL, INC.**

**LEGAL SERVICES FOR YOUNGER ADULTS WITH DISABILITIES**

**January 1, 2021 – June 30, 2024**

**I. Purpose**

The purpose of this grant is to ensure the rights and entitlements of younger adults with disabilities (ages 18-59) by providing legal assistance.

**II. Definitions**

California State Bar The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.

CARBON Contracts Administration, Reporting, and Billing Online System

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 La Raza Centro Legal, Inc.

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to adults with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;

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

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 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.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

Services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income

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

#### **IV. Eligibility for Services**

- 1) A resident of San Francisco *and*
- 2) Aged 18-59 living with a disability

#### **V. Location and Time of Services**

La Raza Centro Legal, Inc.'s offices are located at 474 Valencia St #295, San Francisco, CA 94103. Services are offered Monday through Friday during regular business hours.

#### **VI. Description of Services**

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

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

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

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

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

- 1) Income/Nutrition: Supplemental Security Income (SSI), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment

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

Clients can expect that the legal service provider is experienced and knowledgeable about working with people with disabilities. Grantee is expected to keep up with changes in the law that affect people with disabilities and particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

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

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

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

\*\*\*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 the COVID-19 pandemic. 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.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve **19** unduplicated clients.

- Grantee will provide 232 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, beginning July 1, 2021:

- Grantee will serve 38 unduplicated clients.
- Grantee will provide 465 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

### **VIII. Outcome Objectives**

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
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- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance)
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- J. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

INSERT PROGRAM ANALYST

Program Analyst, Office of Community Partnerships  
 DAS  
 P.O. Box 7988  
 San Francisco, CA 94120-7988  
[insert@sfgov.org](mailto:insert@sfgov.org)

and

INSERT CONTRACT MANAGER

Contract Manager  
 Human Services Agency  
 PO Box 7988  
 San Francisco, CA 94120-7988  
 (415) 355-3607  
[INSERTCONTRACTMANAGER@sfgov.org](mailto:INSERTCONTRACTMANAGER@sfgov.org)

**X. Monitoring Activities**

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and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

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	A	B	C	D	E	F
1						Appendix B, Page 1
2						Date: 11/6/2020
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name			Term		
6	Agency Name: La Raza Centro Legal			1/1/21-6/30/24		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.			No. of Mod.		
9	<b>Program: Legal Services-Younger Adults with Disabilities</b>					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$12,761	\$25,520	\$25,520	\$25,520	\$89,321
14	Operating Expenses	\$2,412	\$4,825	\$4,825	\$4,825	\$16,887
15	<b>Subtotal</b>	<b>\$15,173</b>	<b>\$30,345</b>	<b>\$30,345</b>	<b>\$30,345</b>	<b>\$106,208</b>
16	Indirect Percentage (%)	6%	6%	6%	6%	6%
17	Indirect Cost (Line 16 X Line 15)	\$910	\$1,821	\$1,821	\$1,821	\$6,373
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$16,084	\$32,167	\$32,167	\$32,167	\$112,585
20	<b>HSA Revenues</b>					
21	General Fund	\$16,084	\$32,167	\$32,167	\$32,167	\$112,585
22						
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$16,084</b>	<b>\$32,167</b>	<b>\$32,167</b>	<b>\$32,167</b>	<b>\$112,585</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues	\$16,084	\$32,167	\$32,167	\$32,167	\$112,585
37	Full Time Equivalent (FTE)					
39	Prepared by: Shannon Jew			Telephone No.: (415) 553-3409		
40	HSA-CO Review Signature: _____					
41	HSA #1					6/20/2018



	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3	Agency Name: La Raza Centro Legal												
4	Program: Legal Services-Younger Adults with Disabilities												
5													
6													
7	<b>Operating Expense Detail</b>												
8													
9													
10													
11													TOTAL
12	<u>Expenditure Category</u>				<u>TERM</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>7/1/23-6/30/24</u>				<u>1/1/21-6/30/24</u>
13	Rental of Property					\$613	\$1,226	\$1,226	\$1,226				\$4,291
14	Computer Hardware					\$49	\$98	\$98	\$98				\$343
15	Office Supplies, Postage, Printing & Production					\$147	\$295	\$295	\$295				\$1,032
16	Building Maintenance and Repair					\$61	\$183	\$183	\$183				\$610
17	Dues, Memberships, & Subscriptions					\$41	\$86	\$86	\$86				\$299
18	Insurance					\$282	\$495	\$495	\$495				\$1,767
19	Telecommunications					\$224	\$458	\$458	\$458				\$1,598
20	Travel & Meals					\$21	\$98	\$98	\$98				\$315
21	Rental of Equipment					\$131	\$201	\$201	\$201				\$734
22													
23	<b>CONSULTANTS</b>												
24	Finance Consultant					\$614	\$1,228	\$1,228	\$1,228				\$4,298
25	Janitorial					\$177	\$354	\$354	\$354				\$1,239
26	IT Contractor					\$52	\$103	\$103	\$103				\$361
27	<b>OTHER</b>												
28													
29													
30													
31	<b>TOTAL OPERATING EXPENSE</b>					<b>\$2,412</b>	<b>\$4,825</b>	<b>\$4,825</b>	<b>\$4,825</b>				<b>\$16,887</b>
32													
33	HSA #3												6/20/2018

## APPENDIX A

### Legal Assistance to the Elderly

#### LEGAL SERVICES FOR YOUNGER ADULTS WITH DISABILITIES

January 1, 2021 – June 30, 2024

#### I. Purpose

The purpose of this grant is to ensure the rights and entitlements of younger adults with disabilities (ages 18-59) by providing legal assistance.

#### II. Definitions

California State Bar The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.

CARBON Contracts Administration, Reporting, and Billing Online System

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 Legal Assistance to the Elderly

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to adults with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;

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

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 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.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

Services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income

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

#### **IV. Eligibility for Services**

- 1) A resident of San Francisco *and*
- 2) Aged 18-59 living with a disability

#### **V. Location and Time of Services**

Legal Assistance to the Elderly's offices are located at 1663 Mission Street, Suite 225. Services are offered Monday through Friday during regular business hours.

#### **VI. Description of Services**

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

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

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

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

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

- 1) Income/Nutrition: Supplemental Security Income (SSI), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment

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

Clients can expect that the legal service provider is experienced and knowledgeable about working with people with disabilities. Grantee is expected to keep up with changes in the law that affect people with disabilities and particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

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

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

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

\*\*\*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 the COVID-19 pandemic. 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.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve **39** unduplicated clients.



- Grantee will provide 360 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, beginning July 1, 2021:

- Grantee will serve 77 unduplicated clients.
- Grantee will provide 720 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

### VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance)
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance)
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year

## IX. Additional Reporting Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- G. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- H. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- I. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102

Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

- J. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

INSERT PROGRAM ANALYST  
Program Analyst, Office of Community Partnerships  
DAS  
P.O. Box 7988  
San Francisco, CA 94120-7988  
[insert@sfgov.org](mailto:insert@sfgov.org)

and

INSERT CONTRACT MANAGER  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3607  
[INSERTCONTRACTMANAGER@sfgov.org](mailto:INSERTCONTRACTMANAGER@sfgov.org)

## X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

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

	A	E	H	K	N	O
1	Appendix B, Page 1					
2	Document Date: December 2020					
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5						
6						
7	Name				Term	
8	Legal Assistance to the Elderly				Jan 2021 - Jun 2024	
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: Legal services for adults with disabilities					
12	Budget Reference Page No.(s)					
13	Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
14						
15	<b>DAS Expenditures</b>					
16	Salaries & Benefits	\$16,875	\$33,748	\$33,748	\$33,748	\$118,119
17	Operating Expenses	\$2,693	\$5,383	\$5,383	\$5,383	\$18,842
18	<b>Subtotal</b>	<b>\$19,568</b>	<b>\$39,131</b>	<b>\$39,131</b>	<b>\$39,131</b>	<b>\$136,961</b>
19	Indirect Percentage (%)	15%	15%	15%	15%	15%
20	Indirect Cost	\$2,932	\$5,869	\$5,869	\$5,869	\$20,539
21	Capital Expenditure					
22	Sub-Contractor Expenditure					
23	<b>Total DAS Expenditures</b>	<b>\$22,500</b>	<b>\$45,000</b>	<b>\$45,000</b>	<b>\$45,000</b>	<b>\$157,500</b>
24						
25						
26	<b>DAS Revenues</b>					
27	General Fund	\$22,500	\$45,000	\$45,000	\$45,000	\$157,500
28						
29						
30						
31						
32						
33						
34						
35						
36						
37						
38						
39						
40	<b>Total DAS Revenue</b>	<b>\$22,500</b>	<b>\$45,000</b>	<b>\$45,000</b>	<b>\$45,000</b>	<b>\$157,500</b>
41						
42	<b>Non DAS Revenues</b>					
43						
44						
45						
46						
47						
48	<b>Total Non DAS Revenue</b>					
49	<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$22,500</b>	<b>\$45,000</b>	<b>\$45,000</b>	<b>\$45,000</b>	<b>\$157,500</b>
50						
51	Full Time Equivalent (FTE)					
52						
53	Prepared by:	Telephone No.:				Date: 5/10/18
54	HSA-CO Review Signature: _____					
55						
56	HSA #1 <span style="float:right;">10/25/2016</span>					

	A	B	C	D	E	H	K	N	Q	R						
1	Program: Legal services for adults with disabilities															
2	(Same as Line 11 on HSA #1)															
3																
4																
5																
6																
7																
	<b>Salaries &amp; Benefits Detail</b>															
			Agency Totals		HSA Program		11/21 - 6/30/21		FY 21/22		FY 22/23		FY 23/24		Total	
8	DAS Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget
9	Position															
10	EXEC DIRECTOR	\$112,381	1.00	3.98%	0.04	\$2,239	\$4,477	\$4,477	\$4,477	\$4,477	\$4,477	\$4,477	\$4,477	\$4,477	\$15,670	
11	Director of Lit.	\$94,000	1.00	4.41%	0.04	\$2,071	\$4,142	\$4,142	\$4,142	\$4,142	\$4,142	\$4,142	\$4,142	\$4,142	\$14,497	
12	STAFF ATTORNEY	\$80,963	0.80	12.17%	0.10	\$3,940	\$7,880	\$7,880	\$7,880	\$7,880	\$7,880	\$7,880	\$7,880	\$7,880	\$27,580	
13	STAFF Attorney	\$68,905	1.00	14.98%	0.15	\$5,163	\$10,325	\$10,325	\$10,325	\$10,325	\$10,325	\$10,325	\$10,325	\$10,325	\$36,138	
14	Grants Manager	\$53,000	1.00	0.74%	0.01	\$196	\$392	\$392	\$392	\$392	\$392	\$392	\$392	\$392	\$1,372	
15																
16																
17																
18																
19	Totals	\$409,249	4.80	36.28%	0.34	\$13,609	\$27,216	\$27,216	\$27,216	\$27,216	\$27,216	\$27,216	\$27,216	\$27,216	\$95,257	
20																
21	Fringe Benefits Rate	24.00%														
22	Employee Fringe Benefits	\$98,220				\$3,266	\$6,532	\$6,532	\$6,532	\$6,532	\$6,532	\$6,532	\$6,532	\$6,532	\$22,862	
23	Total DAS Salaries and Benefits	\$507,469				\$16,875	\$33,748	\$33,748	\$33,748	\$33,748	\$33,748	\$33,748	\$33,748	\$33,748	\$118,119	
24																
25	HSA #2															10/25/2016

	A	B	C	D	I	J	O	P	U	V	AA	A	AC	
1	Program: Legal services for adults with disabilities												Appendix B, Page 3	
2	(Same as Line 11 on HSA #1)												Document Date: December 2020	
3														
4														
5	<b>Operating Expense Detail</b>													
6														
7					1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24						Total
9														
10	DAS Operating Expenses													
11	Expenditure Category													
12	Rental of Property				\$1,433	\$2,865	\$2,865	\$2,865	\$2,865				\$10,028	
13	Utilities (Elec, Water, Gas, Phone, Garbage)				\$133	\$265	\$265	\$265	\$265				\$928	
14	Office Supplies, Postage				\$380	\$759	\$759	\$759	\$759				\$2,657	
15	Building Maintenance Supplies and Repair													
16	Printing and Reproduction				\$39	\$78	\$78	\$78	\$78				\$273	
17	Insurance				\$223	\$446	\$446	\$446	\$446				\$1,561	
18	Staff Training				\$50	\$100	\$100	\$100	\$100				\$350	
19	Staff Travel-(Local & Out of Town)				\$15	\$30	\$30	\$30	\$30				\$105	
20	Rental of Equipment, Maintenance and repair				\$71	\$142	\$142	\$142	\$142				\$497	
21	Law Library Maintenance				\$150	\$300	\$300	\$300	\$300				\$1,050	
22	State Bar Dues				\$120	\$240	\$240	\$240	\$240				\$840	
23	Professional Memberships				\$14	\$28	\$28	\$28	\$28				\$98	
24	Volunteer Recognition				\$15	\$30	\$30	\$30	\$30				\$105	
25	Cloud-based services				\$50	\$100	\$100	\$100	\$100				\$350	
26	Client Litigation Costs													
27														
28	Consultant													
29	Consultant A													
30														
31														
32	<b>Total DAS Operating Expenses</b>				<b>\$2,693</b>	<b>\$5,383</b>	<b>\$5,383</b>	<b>\$5,383</b>	<b>\$5,383</b>				<b>\$18,842</b>	
33														
34	HSA #3												10/25/2016	

**APPENDIX A**

**Open Door Legal**

**LEGAL SERVICES FOR YOUNGER ADULTS WITH DISABILITIES**

**January 1, 2021 – June 30, 2024**

**I. Purpose**

The purpose of this grant is to ensure the rights and entitlements of younger adults with disabilities (ages 18-59) by providing legal assistance.

**II. Definitions**

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Disability A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment

Frail An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.

Grantee Open Door Legal

HSA Human Services Agency of City and County of San Francisco

Legal Assistance Legal advice and representation provided by an attorney to adults with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney;



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

LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 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.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population

Services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income

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

#### **IV. Eligibility for Services**

- 1) A resident of San Francisco *and*
- 2) Aged 18-59 living with a disability

#### **V. Location and Time of Services**

Open Door Legal's offices are located at 4634 3<sup>rd</sup> Street, 60 Ocean Avenue, and 1111 Buchanan Street. Services are offered Monday through Friday during regular business hours.

#### **VI. Description of Services**

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

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

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

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

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

- 1) Income/Nutrition: Supplemental Security Income (SSI), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment

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

Clients can expect that the legal service provider is experienced and knowledgeable about working with people with disabilities. Grantee is expected to keep up with changes in the law that affect people with disabilities and particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

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

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

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

\*\*\*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 the COVID-19 pandemic. 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.

## VII. Service Objectives

For the period 1/1/21 – 6/30/21:

- Grantee will serve **11** unduplicated clients.

- Grantee will provide 250 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, beginning July 1, 2021:

- Grantee will serve 21 unduplicated clients.
- Grantee will provide 500 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

### **VIII. Outcome Objectives**

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance)
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance)
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25<sup>th</sup> each year
- 2nd Quarter (covering October, November, December) due January 25<sup>th</sup> each year
- 3rd Quarter (covering January, February, March) due April 25<sup>th</sup> each year
- 4th Quarter (covering April, May, June) due July 25<sup>th</sup> each year

## IX. Additional Reporting Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report shall be submitted via the CARBON system.
- D. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10th (for July 1-December 31 data) and July 10th (for January 1-June 30 data)
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- G. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- H. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- I. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102

Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

- J. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Reanna Albert  
Program Analyst, Office of Community Partnerships  
DAS  
P.O. Box 7988  
San Francisco, CA 94120-7988  
[reanna.albert@sfgov.org](mailto:reanna.albert@sfgov.org)

and

Ella Lee  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3607  
[ella.lee@sfgov.org](mailto:ella.lee@sfgov.org)

## X. Monitoring Activities

- A. **Program Monitoring:** Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence of provision of the California Department of Aging (CDA) Security Awareness training to staff; program operation, which includes a review of a written policies and procedures manual of all 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

	A	E	H	K	N	O
1						
2						
3						
4						
5						
6						
7	Name					Term
8	Open Door Legal					Jan 2021 - Jun 2024
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: Legal services for adults with disabilities					
12	Budget Reference Page No.(s)					
13	Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
15						
16	<b>DAS Expenditures</b>					
17	Salaries & Benefits	\$15,041	\$30,082	\$30,082	\$30,082	\$105,287
18	Operating Expenses	\$3,142	\$6,280	\$6,280	\$6,280	\$21,982
19	<b>Subtotal</b>	<b>\$18,183</b>	<b>\$36,362</b>	<b>\$36,362</b>	<b>\$36,362</b>	<b>\$127,269</b>
20	Indirect Percentage (%)	10.00%	10.00%	10.00%	10.00%	10.00%
21	Indirect Cost	\$1,817	\$3,638	\$3,638	\$3,638	\$12,731
26	Capital Expenditure					
27	Sub-Contractor Expenditure					
28	<b>Total DAS Expenditures</b>	<b>\$20,000</b>	<b>\$40,000</b>	<b>\$40,000</b>	<b>\$40,000</b>	<b>\$140,000</b>
29						
30						
31	<b>DAS Revenues</b>					
32	General Fund	\$20,000	\$40,000	\$40,000	\$40,000	\$140,000
33						
34						
35						
36						
37						
38						
39						
40	<b>Total DAS Revenue</b>	<b>\$20,000</b>	<b>\$40,000</b>	<b>\$40,000</b>	<b>\$40,000</b>	<b>\$140,000</b>
41						
42	<b>Non DAS Revenues</b>					
43						
44						
45						
46						
47						
48	<b>Total Non DAS Revenue</b>					
49	<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$20,000</b>	<b>\$40,000</b>	<b>\$40,000</b>	<b>\$40,000</b>	<b>\$140,000</b>
50						
51	Full Time Equivalent (FTE)					
53	Prepared by:	Rachel Mellby	Telephone No.:	415-851-0314	Date: 11/2/2020	
54	HSA-CO Review Signature: _____					
55						
56	HSA #1					Date: 11/2/2020



A		B	C	D	E	H	K	N	Q	R		
1 Program: Legal services for adults with disabilities										Appendix B, Page 2		
2 (Same as Line 11 on HSA #1)										Document Date: December 2020		
3												
4												
5												
6												
7												
<b>Salaries &amp; Benefits Detail</b>												
Agency Totals		HSA Program		11/21 - 6/30/21		FY 21/22		FY 22/23		FY 23/24		Total
Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max. 100%)	Adjusted FTE	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget
8 DAS Salary												
9 Lead Elder Law Attorney - Sil Liapis	\$84,000	0.46	5.00%	0.02	\$966	\$1,932	\$1,932	\$1,932	\$1,932	\$1,932	\$1,932	\$6,762
10 Elder Law Attorney - Kevin Buggy	\$77,000	0.46	5.00%	0.02	\$886	\$1,771	\$1,771	\$1,771	\$1,771	\$1,771	\$1,771	\$6,199
11 Consumer Attorney - Philip Green	\$81,500	0.34	25.00%	0.09	\$3,464	\$6,928	\$6,928	\$6,928	\$6,928	\$6,928	\$6,928	\$24,248
12 Senior Staff Attorney - Tara Macomber	\$86,000	0.15	25.00%	0.04	\$1,613	\$3,225	\$3,225	\$3,225	\$3,225	\$3,225	\$3,225	\$11,288
13 Lead Employment Attorney - Lindsey Pace	\$81,100	0.14	25.00%	0.04	\$1,420	\$2,839	\$2,839	\$2,839	\$2,839	\$2,839	\$2,839	\$9,837
14 Staff Housing Attorney - Devin Fathi	\$77,000	0.11	25.00%	0.03	\$1,059	\$2,118	\$2,118	\$2,118	\$2,118	\$2,118	\$2,118	\$7,413
15 Employment & Civil Litigation Paralegal - Brenda Falcon Ramos	\$62,500	0.10	25.00%	0.03	\$782	\$1,563	\$1,563	\$1,563	\$1,563	\$1,563	\$1,563	\$5,471
16 Immigration/Elder Law Paralegal - Jenny Salas	\$81,500	0.09	25.00%	0.02	\$917	\$1,834	\$1,834	\$1,834	\$1,834	\$1,834	\$1,834	\$6,419
17 Housing Attorney - Alex Lemberg	\$87,000	0.05	25.00%	0.01	\$544	\$1,088	\$1,088	\$1,088	\$1,088	\$1,088	\$1,088	\$3,808
18 Sr. Housing Attorney - TBH	\$69,782	0.90										
19 Allocated Shared salaries (7.2 FTEs. total \$502,500)												
20												
21												
22												
23 Totals	\$849,892	2.90	210.00%	0.32	\$12,431	\$24,861	\$24,861	\$24,861	\$24,861	\$24,861	\$24,861	\$87,014
24												
25 Fringe Benefits Rate	21.00%											
26 Employee Fringe Benefits	\$178,477				\$2,610	\$5,221	\$5,221	\$5,221	\$5,221	\$5,221	\$5,221	\$18,273
27 Total DAS Salaries and Benefits	\$1,028,369				\$15,041	\$30,082	\$30,082	\$30,082	\$30,082	\$30,082	\$30,082	\$105,287
28												
29 HSA #2												

Date: 11/2/2020

	A	B	C	D	I	J	O	P	U	V	AA	AI	AC
1	Program: Legal services for adults with disabilities												
2	(Same as Line 11 on HSA #1)												
3													
4													
5													
6													
7													
9													
10	<b>DAS Operating Expenses</b>												
11	<b>Expenditure Category</b>												
12					\$987		\$1,974		\$1,974		\$1,974		\$6,909
13					\$374		\$748		\$748		\$748		\$2,618
14					\$50		\$99		\$99		\$99		\$347
15													
16					\$77		\$154		\$154		\$154		\$639
17					\$504		\$1,007		\$1,007		\$1,007		\$3,525
18					\$182		\$361		\$361		\$361		\$1,265
19					\$31		\$62		\$62		\$62		\$217
20					\$33		\$66		\$66		\$66		\$231
21					\$236		\$473		\$473		\$473		\$1,665
22					\$350		\$701		\$701		\$701		\$2,453
23					\$302		\$604		\$604		\$604		\$2,114
24					\$16		\$31		\$31		\$31		\$109
25													
26													
27													
28													
29													
30					\$3,142		\$6,280		\$6,280		\$6,280		\$21,982
31													
32													

**Operating Expense Detail**

Total

1/1/21 - 6/30/21

FY 21/22

FY 22/23

FY 23/24

Date: 11/2/2020