



Edwin M. Lee, Mayor

Trent Rhorer, Executive Director

MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *JT*

DATE: MAY 3, 2017

SUBJECT: **GRANT RENEWAL: VARIOUS AGENCIES (NON-PROFIT) FOR THE PROVISION OF AGING AND DISABILITY RESOURCE CENTERS (ADRC) AND CITIWIDE INFORMATION AND ASSISTANCE (I & A) SPECIALIST SUPERVISOR FOR INSTITUTE ON AGING**

GRANT TERM:	<u>Current</u> 7/1/14- 6/30/17	<u>Renewal</u> 7/1/17- 6/30/18	<u>Contingency</u>	<u>Total</u>	
GRANT AMOUNT:	\$2,258,991	\$967,447	\$96,745	\$1,064,192	
FUNDING SOURCE	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$851,353		\$116,094	\$96,745	\$1,064,192
PERCENTAGE:	88%		12%		100%

The Department of Aging & Adult Services (DAAS) requests authorization to renew grants with the proposed grantees listed below for the period of July 1, 2017 to June 30, 2018 in an amount of \$967,447 plus a 10% contingency for a total amount not to exceed \$1,064,192. The purpose of the grants is to provide funding for Aging and Disability Resource Centers (ADRC) and the Citywide Information and Assistance (I & A) Specialist Supervisor.

Grantee: ADRC	Annual Amount FY 17/18	Contingency Amount 10%	Total Grant Amount FY 17/18
Bayview Hunters Point Multipurpose Senior Services	\$118,627	\$11,863	\$130,490
Catholic Charities, CYO	\$71,461	\$7,146	\$78,607
Golden Gate Senior Services	\$68,444	\$6,844	\$75,288
Northern California Presbyterian Home and Services (NCPHS)/San Francisco Senior Center	\$144,469	\$14,447	\$158,916
On Lok Day Services	\$96,642	\$9,664	\$106,306
Openhouse	\$69,934	\$6,993	\$76,927
Self Help for the Elderly	\$233,757	\$23,376	\$257,133
Toolworks	\$52,045	\$5,205	\$57,250
Total	\$855,379	\$85,538	\$940,917

Grantee: Citiwide Information & Assistance (I & A) Specialist Supervisor	Annual Amount FY 17/18	Contingency Amount 10%	Total Grant Amount FY 17/18
Institute on Aging	\$112,068	\$11,207	\$123,275
Total	\$112,068	\$11,207	\$123,275

Background

The ADRC serves as a one-stop shop for information and assistance (I & A) services for seniors and younger adults with disabilities. Specifically, ADRC hubs around the City provide services that assist people to continue living independently in the community, connecting them with long-term services and supports. I & A hubs are located throughout the City and each is staffed by I & A specialists and on-site supervisors. Some districts have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. These grants augment existing information and assistance services provided at citywide hubs. Each hub must demonstrate the capability to serve seniors and adults with disabilities of all ages in their supervisory district and neighboring districts, if applicable.

Services to be Provided

Aging and Disability Resource Center (ADRC):

The ADRC center provides one-stop-shop access to I & A and translation services for seniors, adults with disabilities, and caregivers at key neighborhood hubs. I & A positions exist across multiple sites which are already hubs for seniors and adults with disabilities to access other services. Each hub that offers I & A services is considered an ADRC. The I & A position provides services 5 days a week. An additional I & A specialist supervisor meets with staff employed by ADRC sites on a weekly and monthly basis. This supervisor is responsible for providing training, clinical supervision, and executing an outreach plan for the ADRC sites. Day-to-day supervision is provided by the on-site supervisor of the ADRC. The I & A specialist supervisor and on-site supervisor meet monthly to avoid any issues of dual supervision.

Citywide Information and Assistance (I & A) Specialist Supervisor:

The Citywide I & A Specialist Supervisor contributes to the knowledge, helps develop skills, and oversees the performance of I & A specialists working with seniors and adults with disabilities. The supervisor works with I & A staff on offering information and referral, assistance, and follow-up services in accordance with statewide and national standards. A specialist supervisor is available to meet in a large group format and on an individual basis with I & A specialist staff. The specifics of either supervision model are worked out with each specific agency. This flexibility allows for the service model to respond to the culture of each organization.

The Citywide I & A supervisor provides resources by bringing together I & A specialists from a variety of agencies for group and individual supervision meetings and administrative trainings. In general, the supervisor provides more focused and advanced trainings and supervision opportunities than can often be provided by most community organizations.

Grantee Performance

All grantees were found to be compliant with Citywide Fiscal and Compliance Monitoring standards for fiscal year 2016-2017. The Human Services Agency did not find any significant findings during its monitoring. Additionally, all service providers were monitored for program compliance this fiscal year with no significant findings.

Location and Time of Services

For locations and time of services, please see the attached scope of services of each contractor.

Grantee Selection

Grantees were selected through Request for Proposals (RFP) #581 for ADRC, issued on February 11, 2014.

Funding

These grants will be funded 80% through County General funds and 20% through Community Services Block Grant (CSBG) Federal funds.

Attachments

ADRC:

- Appendix A - Scope of Services
- Appendix B - Calculation of Charges
 - Bayview Hunters Point Multipurpose Senior Services
 - Catholic Charities, CYO
 - Golden Gate Senior Services
 - NCPHS/San Francisco Senior Center
 - On Lok Day Services
 - Openhouse
 - Self Help for the Elderly
 - Toolworks

Citywide Information and Assistance (I & A) Specialist Supervisor:

- Appendix A - Scope of Services
- Appendix B - Calculation of Charges
 - Institute on Aging

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
BAYVIEW HUNTERS POINT MULTIPURPOSE SENIOR SERVICES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)

EFFECTIVE JULY 1, 2017 TO JUNE 30, 2018

I. Purpose: To provide one-stop-shop access to information and assistance and translation services for seniors, adults with disabilities, and caregivers at key neighborhood hubs.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
CARBON	Human Services Agency’s Contracts Administration, Reporting, and Billing Online System
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Bayview Hunters Point Multipurpose Senior Services
HSA	Human Services Agency of City and County of San Francisco
I & A	Information and Assistance
Senior	Person who is 60 years of age or older

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

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

IV. Location and Time of Services

One site is located at 5600-A Third Street, San Francisco CA 94124 and second site is located at 1390-1/2 Turk Street, San Francisco, CA 94115. Hours of Operation: Monday-Friday, 9am-5pm.

V. Description of Services

This grant will fund Information and Assistance (I+A) positions across multiple sites. Sites will be located in places that are already hubs for seniors and adults with disabilities to access other services. Each site will be responsible for providing at least one 0.8 FTE. The I+A position will provide services 5 days a week. Each hub that offers I+A services will be considered an Aging and Disability Resource Center (ADRC). An additional I+A specialist supervisor will meet with staff employed by ADRC sites on a weekly and monthly basis. This supervisor will be responsible for providing training, clinical supervision, and outreach for the ADRC sites. Day-to-day supervision will be provided by the on-site supervisor of the ADRC. The I+A specialist supervisor and on-site supervisor will meet monthly to avoid any issues of dual supervision.

Some districts may have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. Bayview Hunters Point Multipurpose Senior Services has two ADRC sites. The grant will be an augmentation of existing information and assistance services provided at city wide hubs. Each hub must demonstrate the capability to serve seniors and adults with disabilities of all ages in their supervisory district and neighboring districts, if applicable.

A hub must demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services. A hub must also demonstrate their ability to provide I+A services if the I+A specialist is unavailable due to sickness or vacation.

If applicable, based on the location of hubs, I+A staff should coordinate with local Housing Authority sites that have social service coordinators, introducing services through presentations and/or fairs. The amount of presentations and/or fairs will be one event per quarter.

Each ADRC I+A specialist will provide the following:

1. Assess the problems and capacities of the individuals;
2. Provide individuals with current information on opportunities and services available within their communities. Services include, but are not limited to adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation;

Assists a consumer in securing the services required to meet his or her needs. Assistance may include contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the consumer to service providers, and conferring with service providers to ensure the client's needs will be met.

UNIT: One Contact

UNITS: 2,674

Follow-up:

To determine the outcome of a referral by contacting the consumer and/or organization to which he/she was referred.

UNIT: One Contact

UNITS: 400

In addition, each grantor will also report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the consumers served at each hub are younger adults with disabilities.
- At least 25% or more individuals served with Assistance who receive help in filling out applications for a financial benefit including Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc., as tracked by the Caller Intake System, will receive service needed.
- One training or outreach event per quarter to the disability community to ensure that community is aware of ADRC program and services.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- At least 85% of participants responding to an annual consumer satisfaction survey that will rate service experience as excellent or good.
- At least 85% of individuals who contact the ADRC to obtain assistance in filling out an application for some type of financial benefit (i.e. Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc) will be able to submit the application for the benefit.

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII - Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated consumer count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into ir2.sfgetcare.com on a monthly basis. Grantee is exempt from entering consumer data into ca.getcare.com but is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each year.
- D. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:

<https://calmaa.hfa3.org/signin>

- E. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- F. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Grant Manager, all other reports should be sent to the following addresses:

Martha Huettl, Intake Services Manager
Department of Aging and Adult Services
1650 Mission St, 5th floor
San Francisco, CA 94103

E:mail address: martha.huettl@sfgov.org

Elena Baranoff, Senior Grant Manager (GB24)
Human Services Agency
PO Box 7988
San Francisco, CA 94120

Email address: elena.baranoff@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Grant Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subgrants, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C
1	Appendix B, Page 1 Document Date: 4/20/17		
2			
3			
4	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY BY PROGRAM		
5			
6	Contractor's Name		
7	Bayview Hunters Point Multipurpose Senior Services, Inc.		
8	(Check One) New _____ Renewal <u>X</u> Modification _____		
9	If modification, Effective Date of Mod.		No. of Mod.
10	Program: BHPMSS - ADRC		
11	Budget Reference Page No.(s)		Total
12	Program Term	7/1/17-6/30/18	7/1/17-6/30/18
13	Expenditures		
14	Salaries & Benefits	\$107,845	\$107,845
15	Operating Expense	\$0	\$0
16	Subtotal	\$107,845	\$107,845
17	Indirect Percentage (10%)	10%	10%
18	Indirect Cost (Line 16 X Line 15)	\$10,783	\$10,783
19	Capital Expenditure		
20	Total Expenditures	\$118,629	\$118,629
21	HSA Revenues		
22	General Fund	\$104,393	\$104,393
23	CFDA #93.778, Medi-Cal	\$14,235	\$14,235
24			
25			
26			
27			
28			
29			
30	TOTAL HSA REVENUES	\$118,629	\$118,629
31	Other Revenues		
32			
33			
34			
35			
36			
37	Total Revenues	\$118,629	\$118,629
38			
40	Prepared by: Justin Cheung	Date 4/20/17	
41	HSA-CO Review Signature: _____		
42	HSA #1		

	A	B	C	D	E	F	G
1							Appendix B, Page 2
2							Document Date: 4/20/17
3							
4	Program Name: BHPMSS - ADRC						
5	(Same as Line 9 on HSA #1)						
6							
7	Salaries & Benefits Detail						
8							
9							
10							7/1/17-6/30/18
11		Agency Totals		For HSA Program		For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/17-6/30/18
13	Intake/ Resource Specialist - BHP	\$44,720	100%	100%	100%	\$44,720	\$44,720
14	Intake/ Resource Specialist -WA	\$38,236	100%	100%	100%	\$38,236	\$38,236
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
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26							
27							
28							
29							
30							
31	TOTALS	\$82,956	2.00	2.00	2.00	\$82,956	\$82,956
32							
33	FRINGE BENEFIT RATE	30%					
34	EMPLOYEE FRINGE BENEFITS	\$24,888				\$24,888	\$24,888
35							
36							
37	TOTAL SALARIES & BENEFITS	\$107,844				\$107,844	\$107,844
38	HSA #2						

**APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
CATHOLIC CHARITIES CYO**

EFFECTIVE JULY 1, 2017 TO JUNE 30, 2018

AGING AND DISABILITIES RESOURCE CENTER (ADRC)

I. Purpose: To provide one-stop-shop access to information and assistance and translation services for seniors, adults with disabilities, and caregivers at key neighborhood hubs.

II. Definitions

CARBON	Human Service Agency’s Contracts Administration Reporting and Billing Online (CARBON) System
DAAS	Department of Aging and Adult Services
Grantee	Catholic Charities CYO
HSA	Human Services Agency of City and County of San Francisco
I+A	Information and Assistance
Senior	Person who is 60 years of age or older
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

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

IV. Location and Time of Services

The location for Catholic Charities: OMI Senior Center, 65 Beverly Street, San Francisco CA 94132. Hours of Operation: Monday-Friday, 9 a.m.-5 p.m.

V. Description of Services

This grant will fund Information and Assistance (I+A) positions across multiple sites. Sites will be located in places that are already hubs for seniors and adults with disabilities to access other services. Each site will be responsible for providing at least one 0.8 FTE. The I+A position will provide services 5 days a week. Each hub that offers I+A services will be considered an Aging and Disability Resource Center (ADRC). An additional I+A specialist supervisor will meet with staff employed by ADRC sites on a weekly and monthly basis. This supervisor will be responsible for providing training, clinical supervision, and outreach for the ADRC sites. Day-to-day supervision will be provided by the on-site supervisor of the ADRC. The I+A specialist supervisor and on-site supervisor will meet monthly to avoid any issues of dual supervision.

Some districts may have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. The grant will be an augmentation of existing information and assistance services provided at city wide hubs. Each hub must demonstrate the capability to serve seniors and adults with disabilities of all ages in their supervisory district and neighboring districts, if applicable.

A hub must demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services. A hub must also demonstrate their ability to provide I+A services if the I+A specialist is unavailable due to sickness or vacation.

If applicable, based on the location of hubs, I+A staff should coordinate with local Housing Authority sites that have social service coordinators, introducing services through presentations and/or fairs. The amount of presentations and/or fairs will be one event per quarter.

Each ADRC I+A specialist will provide the following services:

1. Assesses the problems and capacities of the individuals;
2. Provides individuals with current information on opportunities and services available within their communities. Services include, but are not limited to adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial

assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation;

3. Links the individuals to the opportunities and services that are available through warm transfers or by giving consumer information; email DAAS manager and/or supervisor with requests for multiple services or clinical assessment, warm transfer to DAAS for specific intakes.
4. To the extent practicable, ensures that the individuals receive the services needed, and are aware of the opportunities available by practicing adequate follow-up procedures; and
5. Provides assistance and translation services, such as filling out forms.

Each ADRC hub will provide the following:

1. Provide outreach through presentations and outreach events. Work with I+A specialist supervisor in scheduling events.
2. Ensure coverage of I+A services if I+A specialist is unavailable.
3. Ensure that the I+A specialist has regular use of a computer with internet connection to enter in client data.
4. Ensure that the I+A specialist and client have private space to meet that should include a computer to enter in data and research available resources.

Each ADRC hub will designate at least one 0.8 FTE to be the main I+A specialist for the center. Each center will be responsible for designating a back-up staff member who can offer I+A services in case of the lead worker's absence. Sites will be chosen throughout the city, with an extra concentration in areas that have dense populations of high need and with an ability to expand service to younger adults with disabilities.

VI. Service Objectives

Program Name: Aging and Adults with Disabilities Resource Center

The target numbers listed below are based on performance data from the past 3 years of ADRC data from the site served by this grant that served seniors and adults with disabilities. The proposed target numbers below are for this grant.

of unduplicated consumers to be served:

Seniors: 1120

Adults with Disabilities: 72

Information and Referral:

To provide individuals with current information on opportunities and services available to them within their communities. Services to which ADRCs may refer individuals include, but are not limited to: adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation.

UNIT: One Contact

UNITS: 1200

Assistance:

Links individuals to the services and opportunities that are available within the communities.

Assists a consumer in securing the services required to meet his or her needs. Assistance may include contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the consumer to service providers, and conferring with service providers to ensure the client's needs will be met.

UNIT: One Contact

UNITS: 1430

Follow-up:

To determine the outcome of a referral by contacting the consumer and/or organization to which he/she was referred.

UNIT: One Contact

UNITS: 350

In addition, each contractor will also report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the consumers served at each hub are younger adults with disabilities.
- At least 25% or more individuals served with Assistance who receive help in filling out applications for a financial benefit including Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc., as tracked by the Caller Intake System, will receive service needed.
- One training or outreach event per quarter to the disability community to ensure that community is aware of ADRC program and services.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- At least 85% of participants responding to an annual consumer satisfaction survey that will rate service experience as excellent or good.
- At least 85% of individuals who contact the ADRC to obtain assistance in filling out an application for some type of financial benefit (i.e. Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc) will be able to submit the application for the benefit.

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated consumer count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into ir2.sfgetcare.com on a monthly basis. Grantee is exempt from entering consumer data into ca.getcare.com but is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.

- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each year.
- D. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- E. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- F. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Martha Huettl, Intake Services Manager
 Department of Aging and Adult Services
 1650 Mission St, 5th floor
 San Francisco, CA 94103

Email address: martha.huettl@sfgov.org

Rocio Duenas, Contract Manager (GB17)
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120

Email address: rocio.duenas@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	D	F
1	Appendix B, Page 1		
2	Document Date:		4/12/2017
3			
4	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY		
5			
6	Contractor's Name		
7	Catholic Charities		
8	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>		
9	If modification, Effective Date of Mod.		No. of Mod.
10	Program: Aging Disability Resource Center (ADRC)		
11	Budget Reference Page No.(s)		TOTAL
12	Program Term	7/1/17-6/30/18	7/1/17-6/30/18
13	Expenditures		
14	Salaries & Benefits	\$61,966	\$61,966
15	Operating Expense	\$1,386	\$1,386
16	Subtotal	\$63,352	\$63,352
17	Indirect Percentage (%)	12.80%	12.80%
18	Indirect Cost (Line 16 X Line 17)	\$8,109	\$8,109
19	Capital Expenditure	\$0	\$0
20	Total Expenditures	\$71,461	\$71,461
21	HSA Revenues		
22	General Fund	\$62,886	\$62,886
23	CFDA #93.778, Medi-Cal	\$8,575	\$8,575
24			
25			
26			
27			
28			
29			
30	TOTAL HSA REVENUES	\$71,461	\$71,461
31	Other Revenues		
32			
33	Foundations	\$0	\$0
34	Catholic Charities	\$14,613	\$14,613
35			\$0
36			\$0
37	Total Revenues	\$14,613	\$14,613
38	Full Time Equivalent (FTE)		
40	Prepared by: Patty Clement-Cihak/Delilah Perez		Date 4/12/2017
41	HSA-CO Review Signature:		
42	HSA #1		11/15/2007

	A	B	C	D	E	H	J
1	Appendix B, Page 2						
2	Document Date: 4/12/2017						
3							
4	Program Name: Catholic Charities						
5	Program: ADRC						
6							
7	Salaries & Benefits Detail						
8							
9							
10	7/1/17-6/30/18						
11		Agency Totals		For HSA Program		For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/17-6/30/18
13	Program Manager - Mendez	\$68,453	100%	5%	5%	\$3,691	\$3,691
14	I & A Specialist - Chang	\$39,790	100%	100%	100%	\$39,790	\$39,790
15	Program Asst - Back-Up - Chu	\$28,799	100%	12%	12%	\$4,032	\$4,032
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29	TOTALS	\$137,042	3.00	1.17	1.17	\$47,513	\$47,513
30							
31	FRINGE BENEFIT RATE	30.42%					
32	EMPLOYEE FRINGE BENEFITS	\$41,688				\$14,453	\$14,453
33							
34							
35	TOTAL SALARIES & BENEFITS	\$178,730				\$61,966	\$61,966
36	HSA #2						11/15/2007

	A	B	C	D	I	L	M
1	Appendix B, Page 3						
2	Document Date:						4/12/2017
3							
4	Program Name: Catholic Charities						
5	Program: ADRC						
6							
7	Operating Expense Detail						
8							
9							
10							
11							
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/17-6/30/18</u>		TOTAL <u>7/1/17-6/30/18</u>
13	Rental of Property				\$0		\$0
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$0		\$0
15	Office Supplies, Postage				\$300		\$300
16	Building Maintenance Supplies and Repair				\$0		\$0
17	Printing and Reproduction				\$0		\$0
18	Insurance				\$210		\$210
19	Staff Training				\$100		\$100
20	Staff Travel-(Local & Out of Town)				\$306		\$306
21	Rental of Equipment				\$300		\$300
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE						
23	Advertisement				\$170		\$170
24							
25							
26							
27							
28	OTHER						
29							
30							
31							
32							
33							
34							
35	TOTAL OPERATING EXPENSE				\$1,386		\$1,386
36							
37	HSA #3						11/15/2007

APPENDIX A –SERVICES TO BE PROVIDED
Golden Gate Senior Services
Aging and Disabilities Resource Center (ADRC)
July 1, 2017 to June 30, 2018

I. Purpose: To provide one-stop-shop access to information and assistance and translation services for seniors, adults with disabilities, and caregivers at key neighborhood hubs.

II. Definitions

DAAS	Department of Aging and Adult Services
Grantee	Golden Gate Senior Services
HSA	Human Services Agency of City and County of San Francisco
Senior	Person who is 60 years of age or older
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
CARBON	Contracts Administration, Reporting, and Billing Online

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

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

IV. Location and Time of Services

Services will be provided at Richmond Senior Center, 6221 Geary Boulevard, 3rd floor, San Francisco, 94121. Hours of Operation: Monday-Friday, 9am-5pm.

V. Description of Services

This grant will fund Information and Assistance (I+A) positions across multiple sites. Sites will be located in places that are already hubs for seniors and adults with disabilities to access other services. Each site will be responsible for providing at least one 0.8 FTE. The Information and Assistance (I+A) position will provide services 5 days a week. Each hub that offers I+A services will be considered an Aging and Disability Resource Center (ADRC). An additional I+A specialist supervisor will meet with staff employed by ADRC sites on a weekly and monthly basis. This supervisor will be responsible for providing training, clinical supervision, and an executing outreach plan for the ADRC sites. Day-to-day supervision will be provided by the on-site supervisor of the ADRC. The I+A specialist supervisor and on-site supervisor will meet monthly to avoid any issues of dual supervision.

This grant will provide \$68,444 of funding for Golden Gate Senior Center ADRC site. Some districts may have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. The contract will be an augmentation of existing information and assistance services provided at city wide hubs. Each hub must demonstrate the capability to serve seniors and adults with disabilities of all ages in their supervisory district and neighboring districts, if applicable.

A hub must demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services. A hub must also demonstrate their ability to provide I+A services if the I+A specialist is unavailable due to sickness or vacation.

If applicable, based on the location of hubs, I+A staff should coordinate with local Housing Authority sites that have social service coordinators, introducing services through presentations and/or fairs. The amount of presentations and/or fairs will be one event per quarter.

Each ADRC I+A specialist will provide the following services:

1. Assesses the problems and capacities of the individuals;
2. Provides individuals with current information on opportunities and services available within their communities. Services include, but are not limited to adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation;
3. Links the individuals to the opportunities and services that are available through warm transfers or by giving consumer information; email DAAS manager and/or supervisor with requests for multiple services or clinical assessment, warm transfer to DAAS for specific intakes.

UNIT: One Contact

UNITS: 1337

Follow-up:

To determine the outcome of a referral by contacting the consumer and/or organization to which he/she was referred.

UNIT: One Contact

UNITS: 600

In addition, each contractor will also report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the consumers served at each hub are younger adults with disabilities.
- At least 25% or more individuals served with Assistance who receive help in filling out applications for a financial benefit including Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc., as tracked by the Caller Intake System, will receive service needed.
- One training or outreach event per quarter to the disability community to ensure that community is aware of ADRC program and services.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- At least 85% of participants responding to an annual consumer satisfaction survey that will rate service experience as excellent or good.
- At least 85% of individuals who contact the ADRC to obtain assistance in filling out an application for some type of financial benefit (i.e. Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc) will be able to submit the application for the benefit.

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated consumer count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into ir2.sfgetcare.com on a monthly basis. Grantee is exempt from entering consumer data into ca.getcare.com but is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each year.
- D. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- E. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- F. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Martha Huettl, Intake Services Manager
Department of Aging and Adult Services
1650 Mission St, 5th floor
San Francisco, CA 94103

E:mail address: martha.huettl@sfgov.org

Drake Herrador, Contract Manager (GB26)
Human Services Agency
PO Box 7988
San Francisco, CA 94120

E:mail address: drake.herrador@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.

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

	A	B	C
1	Appendix B, Page 1 Document Date: 4/12/2017		
2			
3			
4			
HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM			
5	Contractor's Name:	Contract Term:	
6	Golden Gate Senior Services	7/1/17 - 6/30/18	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification		
8	If modification, Effective Date of Mod.		No. of Mod.
9	Program: Aging & Disabilities Resource Center		
10	Budget Reference Page No.(s)		
11	Program Term	7/01/17 - 6/30/18	7/01/17 - 6/30/18
12	Expenditures		
13	Salaries & Benefits	\$68,444	\$68,444
14	Operating Expense	\$0	\$0
15	Subtotal	\$68,444	\$68,444
16	Indirect Percentage (%)		
17	Indirect Cost (Line 16 X Line 15)		
18	Capital Expenditure		
19	Total Expenditures	\$68,444	\$68,444
20	HSA Revenues		
21	General Fund	\$60,231	\$60,231
22	CFDA #93.778, Medi-Cal	\$8,213	\$8,213
23			
24			
25			
26			
27			
28			
29	TOTAL HSA REVENUES	\$68,444	\$68,444
30	Other Revenues		
31			
32			
33			
34			
35			
36	Total Revenues	\$68,444	\$68,444
37	Full Time Equivalent (FTE)		
39	Prepared by: Nicholas Lederer		4/12/2017
40	HSA-CO Review Signature: _____		
41	HSA #1		

	A	B	C	D	E	F	G
1	Appendix B, Page 2						
2	Document Date: 4/12/2017						
3							
4	Golden Gate Senior Services						
5	Aging and Disabilities Resource Center						
6							
7	Salaries & Benefits Detail						
8							
9							
10	7/01/17 - 6/30/18						
11		Agency Totals		For HSA Program		For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	07/01/17-06/30/18
13	I&A Specialist I	\$39,520	100%	75%	75%	\$29,640	\$29,640
14	I&A Specialist II	\$41,600	100%	37.5%	37.5%	\$15,600	\$15,600
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	\$81,120	2.00	1.13	1.13	\$45,240	\$45,240
32	FRINGE BENEFIT RATE	51%					
33	EMPLOYEE FRINGE BENEFITS	\$41,607				\$23,204	\$23,204
34							
35							
36	TOTAL SALARIES & BENEFITS	\$122,727				\$68,444	\$68,444
37	HSA #2						

APPENDIX A –SERVICES TO BE PROVIDED

Northern California Presbyterian Homes and Services-San Francisco Senior Center Aging and Disabilities Resource Center (ADRC) and Information and Assistance (I&A) July 1, 2017 to June 30, 2018

I. **Purpose:** To provide one-stop-shop access to information and assistance and translation services for seniors, adults with disabilities, and caregivers at key neighborhood hubs.

II. Definitions

DAAS	Department of Aging and Adult Services
Grantee	Northern California Presbyterian Homes and Services-San Francisco Senior Center (NCPHS-SFSC)
HSA	Human Services Agency of City and County of San Francisco
Senior	Person who is 60 years of age or older
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
CARBON	Contracts Administration, Reporting, and Billing Online

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

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

IV. Location and Time of Services

Services will be provided at both San Francisco Senior Center locations: 481 O’Farrell Street, San Francisco, CA 94102, and 890 Beach Street, San Francisco, CA 94109. Hours of Operation: Monday-Friday, 9am-5pm.

V. Description of Services

This grant will fund Information and Assistance (I+A) positions across multiple sites. Sites will be located in places that are already hubs for seniors and adults with disabilities to access other services. Each site will be responsible for providing at least one 0.8 FTE. The Information and Assistance (I+A) position will provide services 5 days a week. Each hub that offers I+A services will be considered an Aging and Disability Resource Center (ADRC). An additional I+A specialist supervisor will meet with staff employed by ADRC sites on a weekly and monthly basis. This supervisor will be responsible for providing training, clinical supervision, and an executing outreach plan for the ADRC sites. Day-to-day supervision will be provided by the on-site supervisor of the ADRC. The I+A specialist supervisor and on-site supervisor will meet monthly to avoid any issues of dual supervision.

This grant will provide \$144,469 of funding for 2 NCPHS SF Senior Center ADRC sites. Some districts may have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. The contract will be an augmentation of existing information and assistance services provided at city wide hubs. Each hub must demonstrate the capability to serve seniors and adults with disabilities of all ages in their supervisory district and neighboring districts, if applicable.

A hub must demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services. A hub must also demonstrate their ability to provide I+A services if the I+A specialist is unavailable due to sickness or vacation.

If applicable, based on the location of hubs, I+A staff should coordinate with local Housing Authority sites that have social service coordinators, introducing services through presentations and/or fairs. The amount of presentations and/or fairs will be one event per quarter.

Each ADRC I+A specialist will provide the following services:

1. Assesses the problems and capacities of the individuals;
2. Provides individuals with current information on opportunities and services available within their communities. Services include, but are not limited to adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation;
3. Links the individuals to the opportunities and services that are available through warm transfers or by giving consumer information; email DAAS manager and/or supervisor with requests for multiple services or clinical assessment, warm transfer to DAAS for specific intakes.

4. To the extent practicable, ensures that the individuals receive the services needed, and are aware of the opportunities available by practicing adequate follow-up procedures; and
5. Provides assistance and translation services, such as filling out forms.

Each ADRC hub will provide the following:

1. Provide outreach through presentations and outreach events. Work with I+A specialist supervisor in scheduling events.
2. Ensure coverage of I+A services if I+A specialist is unavailable.
3. Ensure that the I+A specialist has regular use of a computer with internet connection to enter in client data.
4. Ensure that the I+A specialist and client have private space to meet that should include a computer to enter in data and research available resources.

Each ADRC hub will designate at least one 0.8 FTE to be the main I+A specialist for the center. Each center will be responsible for designating a back-up staff member who can offer I+A services in case of the lead worker's absence. Sites will be chosen throughout the city, with an extra concentration in areas that have dense populations of high need and with an ability to expand service to younger adults with disabilities.

VI. Service Objectives

Program Name: Aging and Adults with Disabilities Resource Center

The target numbers listed below are based on performance data from the past 3 years of ADRC data from the sites served by this contract that served seniors and adults with disabilities. The proposed target numbers below are for this contract.

of unduplicated consumers to be served:

Seniors: 2212

Adults with Disabilities: 186

Information and Referral:

To provide individuals with current information on opportunities and services available to them within their communities. Services to which ADRCs may refer individuals include, but are not limited to: adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation.

UNIT: One Contact

UNITS: 2316

Assistance:

Links individuals to the services and opportunities that are available within the communities.

Assists a consumer in securing the services required to meet his or her needs. Assistance may include contacting agencies on behalf of the client, filling out forms, writing letters, making phone

calls to set up or confirm appointments, escorting the consumer to service providers, and conferring with service providers to ensure the client's needs will be met.

UNIT: One Contact

UNITS: 2647

Follow-up:

To determine the outcome of a referral by contacting the consumer and/or organization to which he/she was referred.

UNIT: One Contact

UNITS: 364

In addition, each contractor will also report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the consumers served at each hub are younger adults with disabilities.
- At least 25% or more individuals served with Assistance who receive help in filling out applications for a financial benefit including Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc., as tracked by the Caller Intake System, will receive service needed.
- One training or outreach event per quarter to the disability community to ensure that community is aware of ADRC program and services.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- At least 85% of participants responding to an annual consumer satisfaction survey that will rate service experience as excellent or good.
- At least 85% of individuals who contact the ADRC to obtain assistance in filling out an application for some type of financial benefit (i.e. Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc) will be able to submit the application for the benefit.

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated consumer count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into ir2.sfgetcare.com on a monthly basis. Grantee is exempt from entering consumer data into ca.getcare.com but is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each year.
- D. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- E. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- F. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract

Manager, all other reports should be sent to the following addresses:

Martha Huettl, Intake Services Manager
Department of Aging and Adult Services
1650 Mission St, 5th floor
San Francisco, CA 94103

E:mail address: martha.huettl@sfgov.org

Drake Herrador, Contract Manager (GB26)
Human Services Agency
PO Box 7988
San Francisco, CA 94120

E:mail address: drake.herrador@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

HUMAN SERVICES AGENCY CONTRACT BUDGET - DAAS FAMILY CAREGIVER SUPPORT SERVICES
25% match from agency is required

	A	B	C	D
	Total Costs	Project Income	Agency Match	Title III E
Outreach	-			
Community Education	-			
TOTAL INFORMATION SERVICES	-	-	-	-
Information and Assistance	-			
Comprehensive Assessment	-			
Case Management	-			
Transportation	-			
Assisted Transportation	-			
TOTAL ACCESS	-	-	-	-
Counseling	-			
Caregiver Support Group	-			
Caregiver Training	-			
TOTAL CAREGIVER SUPPORT	-	-	-	-
TOTAL RESPITE CARE	-			
Minor Home Modification	-			
Placement	-			
Homemaker	-			
Chore	-			
Home Security/Safety	-			
Visiting	-			
Assistive Devices	-			
Home Delivered Meals	-			
Legal Assistance	-			
Supply & Misc. Exp.	-			
Income Support/Material Aid	-			
Money Management	-			
Registry	-			
Other	-			
TOTAL SUPPLEMENTAL SERVICES	-	-	-	-
TOTAL DOLLAR AMOUNT	-	-	-	-

	A	B	C
1	Appendix B, Page 1		
2	Document Date: 4/12/2017		
3	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY		
4			
5	Contractor's Name:	Contract Term:	
6	NCPHS/SFSC	7/1/17 - 6/30/18	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification		
8	If modification, Effective Date of Mod. No. of Mod.		
9	Program: ADRC + I&A		
10	Budget Reference Page No.(s)		Total
11	Program Term	7/1/17 - 6/30/18	7/1/17-6/30/18
12	Expenditures		
13	Salaries & Benefits	\$125,280	\$125,280
14	Operating Expense	\$345	\$345
15	Subtotal	\$125,625	\$125,625
16	Indirect Percentage (%)	15%	15%
17	Indirect Cost (Line 16 X Line 17)	\$18,844	\$18,844
18	Capital Expenditure	\$0	\$0
19	Total Expenditures	\$144,469	\$144,469
20	HSA Revenues		
21	General Fund	\$127,133	\$127,133
22	CFDA #93.778, Medi-Cal	\$17,336	\$17,336
23			
24			
25			
26			
27			
28			
29	TOTAL HSA REVENUES	\$144,469	\$144,469
30	Other Revenues		
31			
32			
33			
34			
35			
36	Total Revenues	\$144,469	\$144,469
37	Full Time Equivalent (FTE)	2.05	
39	Prepared by: Georgeann Lang		4/12/2017
40	HSA-CO Review Signature:	_____	
41	HSA #1		11/15/2007

	A	B	C	D	E	F	G
1							Appendix B, Page 2
2							Document Date: 4/12/2017
3							
4	Program: ADRC + I&A						
5							
6							
7	Salaries & Benefits Detail						
8							
9							
10							7/1/17 - 6/30/18
11		Agency Totals		For HSA Program		For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/17 - 6/30/18
13	Information & Assistance Specialist - DT	\$44,133	100%	100%	100%	44,133	\$44,133
14	Information & Assistance Specialist - AP	\$44,133	100%	100%	100%	44,133	\$44,133
15	Director	\$90,670	100%	5%	5%	4,534	\$4,534
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28	TOTALS	\$178,936	3.00	2.05	2.05	\$92,800	\$92,800
29							
30	FRINGE BENEFIT RATE	35%					
31	EMPLOYEE FRINGE BENEFITS	\$62,627.60				\$32,480	\$32,480
32							
33							
34	TOTAL SALARIES & BENEFITS	\$241,564				\$125,280	\$125,280
35	HSA #2						11/15/2007

	A	B	C	D	E	F	G	H	
1	Appendix B, Page 3								
2	Document Date:							4/12/2017	
3									
4									
5	Program: ADRC + I&A								
6									
7	Operating Expense Detail								
8									
9									
10									
11								TOTAL	
12	Expenditure Category		TERM			7/1/17 - 6/30/18		7/1/14-6/30/17	
13	Rental of Property								
14	Utilities(Elec, Water, Gas, Phone, Scavenger)								
15	Program/Office Supplies & Equipment					\$345		\$345	
16	Building Maintenance Supplies and Repair								
17	Printing and Reproduction								
18	Insurance								
19	Staff Training								
20	Staff Travel-(Local & Out of Town)								
21	Rental of Equipment								
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23									
24									
25									
26									
27									
28	OTHER								
29									
30									
31									
32									
33									
34									
35	TOTAL OPERATING EXPENSE						\$345		\$345
36									
37	HSA #3							11/15/2007	

APPENDIX A –SERVICES TO BE PROVIDED

On Lok Day Services

Aging and Disabilities Resource Center (ADRC) and Information and Assistance (I&A)

July 1, 2017 to June 30, 2018

I. Purpose:

To provide one-stop-shop access to information and assistance and translation services for seniors, adults with disabilities, and caregivers at key neighborhood hubs.

II. Definitions

DAAS	Department of Aging and Adult Services
Grantee	On Lok Day Services
HSA	Human Services Agency of City and County of San Francisco
Senior	Person who is 60 years of age or older
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.

III Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

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

IV. Location and Time of Services

Services will be provided at 225 30th Street, San Francisco, CA 94131. Hours of Operation: Monday-Friday, 9am-5pm.

V. Description of Services

This grant will fund Information and Assistance (I&A) positions across multiple sites. Sites will be located in places that are already hubs for seniors and adults with disabilities to access other services. Each site will be responsible for providing at least one 0.8 FTE. The I&A position will provide services 5 days a week. Each hub that offers I&A services will be considered an Aging and Disability Resource Center (ADRC). An additional I&A specialist supervisor will meet with staff employed by ADRC sites on a weekly and monthly basis. This supervisor will be responsible for providing training, clinical supervision, and an executing outreach plan for the ADRC sites. Day-to-day supervision will be provided by the on-site supervisor of the ADRC. The I&A specialist supervisor and on-site supervisor will meet monthly to avoid any issues of dual supervision.

Some districts may have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. The grant will be an augmentation of existing information and assistance services provided at city wide hubs. Each hub must demonstrate the capability to serve seniors and adults with disabilities of all ages in their supervisory district and neighboring districts, if applicable.

A hub must demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services. A hub must also demonstrate their ability to provide I&A services if the I&A specialist is unavailable due to sickness or vacation.

If applicable, based on the location of hubs, I&A staff should coordinate with local Housing Authority sites that have social service coordinators, introducing services through presentations and/or fairs. The amount of presentations and/or fairs will be one event per quarter.

Each ADRC I&A specialist will provide the following services:

1. Assesses the problems and capacities of the individuals;
2. Provides individuals with current information on opportunities and services available within their communities. Services include, but are not limited to adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation;

Follow-up:

To determine the outcome of a referral by contacting the consumer and/or organization to which he/she was referred.

UNIT: One Contact

UNITS: 291

In addition, each grantee will also report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the consumers served at each hub are younger adults with disabilities.
- At least 25% or more individuals served with Assistance who receive help in filling out applications for a financial benefit including Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc., as tracked by the Caller Intake System, will receive service needed.
- One training or outreach event per quarter to the disability community to ensure that community is aware of ADRC program and services.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- At least 85% of participants responding to an annual consumer satisfaction survey that will rate service experience as excellent or good.
- At least 85% of individuals who contact the ADRC to obtain assistance in filling out an application for some type of financial benefit (i.e. Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc) will be able to submit the application for the benefit.

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON (Contracts Administration, Reporting, and Billing Online, fiscal and audit database) by the 15th of the following month. Monthly service objectives include an unduplicated consumer count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into ir2.sfgetcare.com on a monthly basis. Grantee is exempt from entering consumer data into ca.getcare.com but is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each year.
- D. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- E. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- F. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Martha Huettl, Intake Services Manager
Department of Aging and Adult Services
1650 Mission St, 5th floor
San Francisco, CA 94103
E:mail: martha.huettl@sfgov.org

Or

Steve Kim, Contract Manager (GB22)
Human Services Agency
PO Box 7988
San Francisco, CA 94120
E:mail: steve.kim@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E
1	Appendix B, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name			Term	
6	On Lok Day Services / 30th Street Senior Center			7/1/17-6/30/18	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod. 7/1/17 No. of Mod.				
9	Program: ADRC and I&A				
10	Budget Reference Page No.(s)				
11	Program Term	7/1/17-6/30/18			Total
12	Expenditures				
13	Salaries & Benefits	\$84,053			\$84,053
14	Operating Expense	\$4,609			\$4,609
15	Subtotal	\$88,662			\$88,662
16	Indirect Percentage (%)	9%			
17	Indirect Cost (Line 16 X Line 15)	\$7,980			\$7,980
18	Capital Expenditure	\$0			\$0
19	Total Expenditures	\$96,642			\$96,642
20	HSA Revenues				
21	General Fund	\$85,045			\$85,045
22	CFDA# 93.778, Medi-Cal	\$11,597			\$11,597
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$96,642			\$96,642
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$96,642			\$96,642
37	Full Time Equivalent (FTE)	1.53			
39	Prepared by: Valorie Villela	Telephone No.: (415) 550-2211		Date: 4/12/17	
40	HSA-CO Review Signature: _____				
41	HSA #1				

**APPENDIX A – SERVICES TO BE PROVIDED
OPENHOUSE**

AGING AND DISABILITY RESOURCE CENTER (ADRC)

July 1, 2017 to June 30, 2018

I. Purpose: To provide one-stop-shop access to information and assistance and translation services for seniors, adults with disabilities, and caregivers at key neighborhood hubs.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
CARBON	Human Service Agency’s Contracts Administration, Reporting, and Billing Online System
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Openhouse
HSA	Human Services Agency of City and County of San Francisco
I & A	Information and Assistance
Senior	Person who is 60 years of age or older

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

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

IV. Location and Time of Services

Services will be provided at: 65 Laguna Street, San Francisco, CA 94114. Hours of Operation: Monday-Friday, 9am-5pm.

V. Description of Services

This grant will fund Information and Assistance (I+A) positions across multiple sites. Sites will be located in places that are already hubs for seniors and adults with disabilities to access other services. Each site will be responsible for providing at least one 0.8 FTE. The I+A position will provide services 5 days a week. Each hub that offers I+A services will be considered an Aging and Disability Resource Center (ADRC). An additional I+A specialist supervisor will meet with staff employed by ADRC sites on a weekly and monthly basis. This supervisor will be responsible for providing training, clinical supervision, and an executing outreach plan for the ADRC sites. Day-to-day supervision will be provided by the on-site supervisor of the ADRC. The I+A specialist supervisor and on-site supervisor will meet monthly to avoid any issues of dual supervision.

Some districts may have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. The grant will be an augmentation of existing information and assistance services provided at city wide hubs. Each hub must demonstrate the capability to serve seniors and adults with disabilities of all ages in their supervisory district and neighboring districts, if applicable.

A hub must demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services. A hub must also demonstrate their ability to provide I+A services if the I+A specialist is unavailable due to sickness or vacation.

If applicable, based on the location of hubs, I+A staff should coordinate with local Housing Authority sites that have social service coordinators, introducing services through presentations and/or fairs. The amount of presentations and/or fairs will be one event per quarter.

Each ADRC I+A specialist will provide the following services:

1. Assesses the problems and capacities of the individuals;
2. Provides individuals with current information on opportunities and services available within their communities. Services include, but are not limited to adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation;

3. Links the individuals to the opportunities and services that are available through warm transfers or by giving consumer information; email DAAS manager and/or supervisor with requests for multiple services or clinical assessment, warm transfer to DAAS for specific intakes.
4. To the extent practicable, ensures that the individuals receive the services needed, and are aware of the opportunities available by practicing adequate follow-up procedures; and
5. Provides assistance and translation services, such as filling out forms.

Each ADRC hub will provide the following:

1. Provide outreach through presentations and outreach events. Work with I+A specialist supervisor in scheduling events.
2. Ensure coverage of I+A services if I+A specialist is unavailable.
3. Ensure that the I+A specialist has regular use of a computer with internet connection to enter in client data.
4. Ensure that the I+A specialist and client have private space to meet that should include a computer to enter in data and research available resources.

Each ADRC hub will designate at least one 0.8 FTE to be the main I+A specialist for the center. Each center will be responsible for designating a back-up staff member who can offer I+A services in case of the lead worker's absence. Sites will be chosen throughout the city, with an extra concentration in areas that have dense populations of high need and with an ability to expand service to younger adults with disabilities.

VI. Service Objectives

Program Name: Aging and Adults with Disabilities Resource Center

The target numbers listed below are based on performance data from the past 3 years of ADRC data from the site served by this grant that served seniors and adults with disabilities. The proposed target numbers below are for this grant.

of unduplicated consumers to be served:

Seniors: 1106

Adults with Disabilities: 93

Information and Referral:

To provide individuals with current information on opportunities and services available to them within their communities. Services to which ADRCs may refer individuals include, but are not limited to: adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation.

UNIT: One Contact

UNITS: 1158

Assistance:

Links individuals to the services and opportunities that are available within the communities.

Assists a consumer in securing the services required to meet his or her needs. Assistance may include contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the consumer to service providers, and conferring with service providers to ensure the client's needs will be met.

UNIT: One Contact

UNITS: 1337

Follow-up:

To determine the outcome of a referral by contacting the consumer and/or organization to which he/she was referred.

UNIT: One Contact

UNITS: 182

In addition, each grantor will also report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the consumers served at each hub are younger adults with disabilities.
- At least 25% or more individuals served with Assistance who receive help in filling out applications for a financial benefit including Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc., as tracked by the Caller Intake System, will receive service needed.
- One training or outreach event per quarter to the disability community to ensure that community is aware of ADRC program and services.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- A minimum of 85% of participants responding to an annual consumer satisfaction survey that will rate service experience as excellent or good.
- A minimum of 85% of individuals who contact the ADRC to obtain assistance in filling out an application for some type of financial benefit (i.e. Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc) will be able to submit the application for the benefit.

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII - Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated consumer count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into ir2.sfgetcare.com on a monthly basis. Grantee is exempt from entering consumer data into ca.getcare.com but is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each year.
- D. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:

<https://calmaa.hfa3.org/signin>

- E. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- F. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Grant Manager, all other reports should be sent to the following addresses:

Martha Huettl, Intake Services Manager
Department of Aging and Adult Services
1650 Mission St, 5th floor
San Francisco, CA 94103

E:mail address: martha.huettl@sfgov.org

Elena Baranoff, Senior Grant Manager (GB24)
Human Services Agency
PO Box 7988
San Francisco, CA 94120

E:mail address: elena.baranoff@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Grant Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subgrants, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C
1	Appendix B, Page 1 Document Date: 4/13/17		
2			
3			
4	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY		
5			
6	Contractor's Name	7/1/17 - 6/30/18	
7	Openhouse		
8	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>		
9	If modification, Effective Date of Mod. No. of Mod.		
10	Program: Aging Disability Resource Center (ADRC)		
11	Budget Reference Page No.(s)		Total
12	Program Term	7/1/17 - 6/30/18	7/1/17 - 6/30/18
13	Expenditures		
14	Salaries & Benefits	\$60,212	\$60,212
15	Operating Expense	\$600	\$600
16	Subtotal	\$60,812	\$60,812
17	Indirect Percentage (%)	15%	15%
18	Indirect Cost (Line 16 X Line 15)	\$9,123	\$9,122
19	Capital Expenditure	\$0	\$0
20	Total Expenditures	\$69,934	\$69,934
21	HSA Revenues		
22	General Fund	\$61,542	\$61,542
23	CDFA 93.778, Medi-Cal	\$8,392	\$8,392
24			
25			
26			
27			
28			
29			
30	TOTAL HSA REVENUES	\$69,934	\$69,934
31	Other Revenues		
32			
33			
34			
35			
36			
37	Total Revenues	\$69,934	\$69,934
38	Full Time Equivalent (FTE)	1.05	1.05
40	Prepared by: Matthew Cimino	Date: 04/13/2017	
41	HSA-CO Review Signature: _____		
42	HSA #1		

	A	B	C	D	E	F	G
1							Appendix B, Page 2
2							Document Date: 4/13/17
3	Openhouse						
4	Program Name: ADRC						
5							
6							
7	Salaries & Benefits Detail						
8							
9							
10							
11							7/1/17 - 6/30/18
12		Agency Totals		For HSA Program		For DHS Program	TOTAL
	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/17 to 6/30/18
13	I/R Specialist, Manuel	\$45,840	100%	100.0%	100.0%	\$45,840	\$45,840
14	Program Director, Michelle	\$94,116	100%	4.6%	4.6%	\$4,337	\$4,337
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29	TOTALS	\$ 139,956	2.00	1.05	1.05	\$ 50,177	\$50,177
30							
31	FRINGE BENEFIT RATE	20%					
32	EMPLOYEE FRINGE BENEFITS	\$27,991				\$10,035	\$10,035
33							
34							
35	TOTAL SALARIES & BENEFITS	\$167,947				\$ 60,212	\$60,212
36	HSA #2						

	A	B	C	D	E	F	G
1	Appendix B, Page 3						
2	Document Date: 4/13/17						
3	Openhouse						
4	Program Name: ADRC						
5							
6							
7	Operating Expense Detail						
8							
9							
10							
11							
12	<u>Expenditure Category</u>				<u>TERM 7/1/17 - 6/30/18</u>		<u>TOTAL 7/1/17 - 6/30/18</u>
13	Rental of Property						
14	Utilities(Elec, Water, Gas, Phone, Scavenger)						
15	Office Supplies, Postage						
16	Building Maintenance Supplies and Repair						
17	Printing and Reproduction						
18	Insurance						
19	Staff Training						
20	Staff Travel-(Local & Out of Town)				\$600		\$ 600
21	Rental of Equipment						
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE						
23							
24							
25							
26							
27							
28	OTHER						
29							
30							
31							
32							
33							
34							
35	TOTAL OPERATING EXPENSE				\$600		\$ 600
36							
37	HSA #3						

APPENDIX A –SERVICES TO BE PROVIDED
Self Help for the Elderly
Aging and Disabilities Resource Center (ADRC)
July 1, 2017 to June 30, 2018

I. Purpose: To provide one-stop-shop access to information and assistance and translation services for seniors, adults with disabilities, and caregivers at key neighborhood hubs.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing Online (CARBON) System
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Toolworks
HSA	Human Services Agency of City and County of San Francisco
I+A	Information and Assistance
Senior	Person who is 60 years of age or older

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

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

1V. Location and Time of Services

The services for Self Help for the Elderly will be provided at 601 Jackson Street basement, San Francisco, CA 94133, 777 Stockton Street, San Francisco CA 94108 and 2601 40th Avenue, San Francisco, CA 94116. Hours of Operation: Monday-Friday, 9am-5pm.

V. Description of Services

This grant will fund Information and Assistance (I+A) positions across multiple sites. Sites will be located in places that are already hubs for seniors and adults with disabilities to access other services. Each site will be responsible for providing at least one 0.8 FTE. The I+A position will provide services 5 days a week. Each hub that offers I+A services will be considered an Aging and Disability Resource Center (ADRC). An additional I+A specialist supervisor will meet with staff employed by ADRC sites on a weekly and monthly basis. This supervisor will be responsible for providing training, clinical supervision, and an executing outreach plan for the ADRC sites. Day-to-day supervision will be provided by the on-site supervisor of the ADRC. The I+A specialist supervisor and on-site supervisor will meet monthly to avoid any issues of dual supervision.

Some districts may have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. The contract will be an augmentation of existing information and assistance services provided at city wide hubs. Each hub must demonstrate the capability to serve seniors and adults with disabilities of all ages in their supervisory district and neighboring districts, if applicable.

A hub must demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services. A hub must also demonstrate their ability to provide I+A services if the I+A specialist is unavailable due to sickness or vacation.

If applicable, based on the location of hubs, I+A staff should coordinate with local Housing Authority sites that have social service coordinators, introducing services through presentations and/or fairs. The amount of presentations and/or fairs will be one event per quarter.

Each ADRC I+A specialist will provide the following services:

1. Assesses the problems and capacities of the individuals;
2. Provides individuals with current information on opportunities and services available within their communities. Services include, but are not limited to adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation;

3. Links the individuals to the opportunities and services that are available through warm transfers or by giving consumer information; email DAAS manager and/or supervisor with requests for multiple services or clinical assessment, warm transfer to DAAS for specific intakes.
4. To the extent practicable, ensures that the individuals receive the services needed, and are aware of the opportunities available by practicing adequate follow-up procedures; and
5. Provides assistance and translation services, such as filling out forms.

Each ADRC hub will provide the following:

1. Provide outreach through presentations and outreach events. Work with I+A specialist supervisor in scheduling events.
2. Ensure coverage of I+A services if I+A specialist is unavailable.
3. Ensure that the I+A specialist has regular use of a computer with internet connection to enter in client data.
4. Ensure that the I+A specialist and client have private space to meet that should include a computer to enter in data and research available resources.

Each ADRC hub will designate at least one 0.8 FTE to be the main I+A specialist for the center. Each center will be responsible for designating a back-up staff member who can offer I+A services in case of the lead worker's absence. Sites will be chosen throughout the city, with an extra concentration in areas that have dense populations of high need and with an ability to expand service to younger adults with disabilities.

VI. Service Objectives

Program Name: Aging and Adults with Disabilities Resource Center

The target numbers listed below are based on performance data from the past 3 years of ADRC data from the sites served by this contract that served seniors and adults with disabilities. The proposed target numbers below are for this contract.

of unduplicated consumers to be served:

Seniors: 4346

Adults with Disabilities: 453

Information and Referral:

To provide individuals with current information on opportunities and services available to them within their communities. Services to which ADRCs may refer individuals include, but are not limited to: adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation.

UNIT: One Contact

UNITS: 4678

Assistance:

Links individuals to the services and opportunities that are available within the communities.

Assists a consumer in securing the services required to meet his or her needs. Assistance may include contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the consumer to service providers, and conferring with service providers to ensure the client's needs will be met.

UNIT: One Contact

UNITS: 5437

Follow-up:

To determine the outcome of a referral by contacting the consumer and/or organization to which he/she was referred.

UNIT: One Contact

UNITS: 747

In addition, each contractor will also report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the consumers served at each hub are younger adults with disabilities.
- At least 25% or more individuals served with Assistance who receive help in filling out applications for a financial benefit including Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc., as tracked by the Caller Intake System, will receive service needed.
- One training or outreach event per quarter to the disability community to ensure that community is aware of ADRC program and services.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- At least 85% of participants responding to an annual consumer satisfaction survey that will rate service experience as excellent or good.
- At least 85% of individuals who contact the ADRC to obtain assistance in filling out an application for some type of financial benefit (i.e. Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc) will be able to submit the application for the benefit.

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated consumer count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into ir2.sfgetcare.com on a monthly basis. Grantee is exempt from entering consumer data into ca.getcare.com but is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each year.
- D. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:

<https://calmaa.hfa3.org/signin>

- E. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- F. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Martha Huettl, Intake Services Manager
Department of Aging and Adult Services
1650 Mission St, 5th floor
San Francisco, CA 94103

E:mail address: martha.huettl@sfgov.org

Tahir Shaikh, Contract Manager (GB21)
Human Services Agency
PO Box 7988
San Francisco, CA 94120

E:mail address: tahir.shaikh@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	E
1	Appendix B, Page 1		
2	Document Date: 2/13/2017		
3	HUMAN SERVICES AGENCY BUDGET SUMMARY		
4	BY PROGRAM		
5	Name		
6	Self-Help for the Elderly		
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: ADRC		
10	Budget Reference Page No.(s)		Total
11	Program Term	7/1/17-6/30/18	7/1/17-6/30/18
12	Expenditures		
13	Salaries & Benefits	\$194,664	\$194,664
14	Operating Expense	\$14,046	\$14,046
15	Subtotal	\$208,710	\$208,710
16	Indirect Percentage (%)	12%	12%
17	Indirect Cost (Line 16 X Line 15)	\$25,047	\$25,047
18	Capital Expenditure	\$0	\$0
19	Total Expenditures	\$233,757	\$233,757
20	HSA Revenues		
21	General Fund	\$205,706	\$205,706
22	CFDA #93.778, Medi-Cal	\$28,051	\$28,051
23			
24			
25			
26			
27			
28			
29	TOTAL HSA REVENUES	\$233,757	\$233,757
30	Other Revenues		
31			
32			
33			
34			
35			
36	Total Revenues	\$233,757	\$233,757
37	Full Time Equivalent (FTE)		
39	Prepared by: Leny Nair	Date 2/13/17	
40	HSA-CO Review Signature:	_____	
41	HSA #1	11/15/2007	

	A	B	C	E	F	I
1						Appendix B, Page 2
2						Document Date: 2/13/2017
3						
4	Program Name: ADRC					
5	(Same as Line 9 on HSA #1)					
6						
7	Salaries & Benefits Detail					
8						
9						
10						
11						7/1/17-6/30/18 7/1/17-6/30/18
12		Agency Totals		HSA Progr	For DHS Program	TOTAL
		Annual Full Time Salary for FTE	Total % FTE	Adjusted FTE	Budgeted Salary	
13	Project Coordinator	\$48,204	100%	20%	\$9,641	\$9,641
14	Senior I & A Specialist - Jackson St	\$40,706	100%	100%	\$40,706	\$40,706
15	I & A Specialist - Geen Mun	\$37,440	100%	100%	\$37,440	\$37,440
16	I & A Specialist - South Sunset	\$37,440	80%	80%	\$29,952	\$29,952
17	I & A Specialist - Jackson St	\$37,440	100%	75%	\$28,080	\$28,080
18	Director of Social Service	\$80,000	100%	18%	\$14,400	\$14,400
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30	TOTALS	\$281,230	5.80	3.93	\$160,219	\$160,219
31						
32	FRINGE BENEFIT RATE	21%				
33	EMPLOYEE FRINGE BENEFITS	\$60,462			\$34,445	\$34,445
34						
35						
36	TOTAL SALARIES & BENEFITS	\$341,692			\$194,664	\$194,664
37	HSA #2					11/15/2007

APPENDIX A –SERVICES TO BE PROVIDED
Toolworks
Aging and Disabilities Resource Center (ADRC)
July 1, 2017 to June 30, 2018

I. Purpose: To provide one-stop-shop access to information and assistance and translation services for seniors, adults with disabilities, and caregivers at key neighborhood hubs.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
CARBON	Human Service Agency’s Contracts Administration Reporting and Billing Online (CARBON) System
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Toolworks
HSA	Human Services Agency of City and County of San Francisco
I+A	Information and Assistance
Senior	Person who is 60 years of age or older

III. Target Population

Individuals 60 years of age or older or individuals between 18 and 59 years of age that are living with disabilities. According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

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

IV. Location and Time of Services

Services will take place at Toolworks, Inc., 25 Kearny Street, #400, San Francisco, CA, 94108. Hours of Operation: Monday-Friday, 9am-5pm.

V. Description of Services

This grant will fund Information and Assistance (I+A) positions across multiple sites. Sites will be located in places that are already hubs for seniors and adults with disabilities to access other services. Each site will be responsible for providing at least one 0.8 FTE. The I+A position will provide services 5 days a week. Each hub that offers I+A services will be considered an Aging and Disability Resource Center (ADRC). An additional I+A specialist supervisor will meet with staff employed by ADRC sites on a weekly and monthly basis. This supervisor will be responsible for providing training, clinical supervision, and an executing outreach plan for the ADRC sites. Day-to-day supervision will be provided by the on-site supervisor of the ADRC. The I+A specialist supervisor and on-site supervisor will meet monthly to avoid any issues of dual supervision.

Some districts may have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. The contract will be an augmentation of existing information and assistance services provided at city wide hubs. Each hub must demonstrate the capability to serve seniors and adults with disabilities of all ages in their supervisory district and neighboring districts, if applicable.

A hub must demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services. A hub must also demonstrate their ability to provide I+A services if the I+A specialist is unavailable due to sickness or vacation.

If applicable, based on the location of hubs, I+A staff should coordinate with local Housing Authority sites that have social service coordinators, introducing services through presentations and/or fairs. The amount of presentations and/or fairs will be one event per quarter.

Each ADRC I+A specialist will provide the following services:

1. Assesses the problems and capacities of the individuals;
2. Provides individuals with current information on opportunities and services available within their communities. Services include, but are not limited to adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation;

3. Links the individuals to the opportunities and services that are available through warm transfers or by giving consumer information; email DAAS manager and/or supervisor with requests for multiple services or clinical assessment, warm transfer to DAAS for specific intakes.
4. To the extent practicable, ensures that the individuals receive the services needed, and are aware of the opportunities available by practicing adequate follow-up procedures; and
5. Provides assistance and translation services, such as filling out forms.

Each ADRC hub will provide the following:

1. Provide outreach through presentations and outreach events. Work with I+A specialist supervisor in scheduling events.
2. Ensure coverage of I+A services if I+A specialist is unavailable.
3. Ensure that the I+A specialist has regular use of a computer with internet connection to enter in client data.
4. Ensure that the I+A specialist and client have private space to meet that should include a computer to enter in data and research available resources.

Each ADRC hub will designate at least one 0.8 FTE to be the main I+A specialist for the center. Each center will be responsible for designating a back-up staff member who can offer I+A services in case of the lead worker's absence. Sites will be chosen throughout the city, with an extra concentration in areas that have dense populations of high need and with an ability to expand service to younger adults with disabilities.

VI. Service Objectives

Program Name: Aging and Adults with Disabilities Resource Center

The target numbers listed below are based on performance data from the past 3 years of ADRC data from the site served by this contract that served seniors and adults with disabilities. The proposed target numbers below are for this contract.

of unduplicated consumers to be served:

Seniors: 359

Adults with Disabilities: 840

Information and Referral:

To provide individuals with current information on opportunities and services available to them within their communities. Services to which ADRCs may refer individuals include, but are not limited to: adult day care, care giving, community services, counseling, education, emergency preparedness, employment, financial assistance, financial assistance, government assistance, food assistance, health, housing, in-home care, legal, recreation, safety, recreation, senior centers and transportation.

UNIT: One Contact

UNITS: 1158

Assistance:

Links individuals to the services and opportunities that are available within the communities.

Assists a consumer in securing the services required to meet his or her needs. Assistance may include contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the consumer to service providers, and conferring with service providers to ensure the client's needs will be met.

UNIT: One Contact

UNITS: 1337

Follow-up:

To determine the outcome of a referral by contacting the consumer and/or organization to which he/she was referred.

UNIT: One Contact

UNITS: 128

In addition, each contractor will also report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the consumers served at each hub are younger adults with disabilities.
- At least 25% or more individuals served with Assistance who receive help in filling out applications for a financial benefit including Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc., as tracked by the Caller Intake System, will receive service needed.
- One training or outreach event per quarter to the disability community to ensure that community is aware of ADRC program and services.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- At least 85% of participants responding to an annual consumer satisfaction survey that will rate service experience as excellent or good.
- At least 85% of individuals who contact the ADRC to obtain assistance in filling out an application for some type of financial benefit (i.e. Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc) will be able to submit the application for the benefit.

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated consumer count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into ir2.sfgetcare.com on a monthly basis. Grantee is exempt from entering consumer data into ca.getcare.com but is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 of each year.
- D. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- E. Grantee shall develop and deliver ad hoc reports as requested by HSA.

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

Martha Huettl, Intake Services Manager
Department of Aging and Adult Services
1650 Mission St, 5th floor
San Francisco, CA 94103

E:mail address: martha.huettl@sfgov.org

Tahir Shaikh, Contract Manager (GB21)
Human Services Agency
PO Box 7988
San Francisco, CA 94120

E:mail address: tahir.shaikh@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	D
1	Appendix B Page 1 Document Date: 2/07/2017		
2			
3			
4			
HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY BY PROGRAM			
5	Contractor's Name		
6	Toolworks, Inc		
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>		
8	If modification, Effective Date of Mod.		No. of Mod.
9	Program: ADRC		
10	Budget Reference Page No.(s)		
11	Program Term		7/1/17 - 6/30/18
12	Expenditures		
13	Salaries & Benefits	\$52,045	\$52,045
14	Operating Expense	\$0	\$0
15	Subtotal	\$52,045	\$52,045
16	Indirect Percentage (%)		
17	Indirect Cost (Line 16 X Line 17)	\$0	\$0
18	Capital Expenditure	\$0	\$0
19	Total Expenditures	\$52,045	\$52,045
20	HSA Revenues		
21	General Fund	\$45,800	\$45,800
22	CFDA #93.778, Medi-Cal	\$6,245	\$6,245
23			
24			
25			
26			
27			
28			
29	TOTAL HSA REVENUES	\$52,045	\$52,045
30	Other Revenues		
31			
32			
33			
34			
35			
36	Total Revenues	\$52,045	\$52,045
37	Full Time Equivalent (FTE)		
39	Prepared by: Kristy Feck		2/7/2017
40	HSA-CO Review Signature: _____		
41	HSA #1		

**APPENDIX A – SERVICES TO BE PROVIDED
INSTITUTE ON AGING**

**JULY 1, 2017 to JUNE 30, 2018
Citywide I&A Supervisor**

I. Purpose of Grant

The purpose of this grant is to improve the knowledge, skills, and performance of Information and Assistance (I&A) specialists working with seniors and adults with disabilities; and to maintain agency excellence in the provision of information and assistance services. The primary focus of this service model is to provide support for individual I&A specialists to improve the services delivered to their clients, and to provide professional growth for individual I&A specialists and to help deter staff burnout. The citywide I & A supervisor provides such a resource by bringing together I&A specialists from a variety of agencies for group and individual supervision meetings and administrative trainings. In general, the supervisor provides more focused and advanced trainings and supervision opportunities than can often be provided by most community organizations. The supervisor will also be responsible for managing and supervising outreach activities.

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Institute on Aging
HSA	Human Services Agency of the City and County of San Francisco
Senior	Person who is 60 years of age or older

III. Target Population

The intended recipients of the services provided by the citywide I&A specialist supervisor are DAAS-funded community I&A specialists working with seniors and adults with disabilities.

IV. Description of Services

Grantee shall provide the following services during the term of this grant:

A. Background

The model of contracting directly with I & A hubs throughout the city is similar to an existing collaboration among DAAS-funded case management agencies, where a supervisor provides clinical supervision for case managers at various agencies. This involves sharing supervisory duties. This clinical supervision role is helpful because agencies benefit from this added clinically focused supervision outside their agencies. Similarly, agencies that employ I&A staff will benefit from an offsite supervisor that can provide one-on-one and group supervision, focused strictly on I&A standards.

B. Responsibilities

The Grantee shall provide individual and group administrative supervision, didactic clinical and administrative training, chart and documentation review, and an opportunity for professional networking and resource sharing. The Grantee shall be responsible for arranging for and identifying necessary outreach efforts to promote significant utilization of ADRCs in neighborhoods throughout the City, and advertising Information and Assistance services in coordination with I&A specialists. The Supervisor shall monitor the effectiveness of services at each outstation (e.g., conducting timely follow up activities, appropriateness of referrals, adequate service levels), providing feedback to the DAAS contract monitor as needed. The Grantee shall be the lead in representing ADRC centers for the Aging and Disability Resource Connection (ADRC). As the lead, the Grantee shall attend ADRCConnection meetings and participate in any future ADRCConnection related projects. The Connection is a “no wrong door” model for consumers to access long term care services and supports. It is a partnership between DAAS, the Independent Living Center, and the outstationed resource centers.

The Citywide I&A Supervision Collaborative includes at a minimum the following:

- **Monthly group supervision for all I & A specialists.** Group meetings provide case consultation, topic specific training, and review of core tasks and standards of I&A concepts. With an orientation in I&A core concepts, group supervision and training aims to improve the I&A specialists’ general performance as well as their ability to work with clients (e.g., recognizing case management and other social service needs of clients and the need for follow-up with clients). For group supervision, the I&A Specialist Supervisor also brings in outside experts and trainers to expand knowledge of resources, geriatric and disability related topics, clinical skills with a focus on knowledge of resources, assessment, conducting effective follow-ups, and managing challenging client issues. An added benefit of the group supervision context is the camaraderie that develops between participants encouraging resource sharing, cross agency referrals, and peer review and guidance.
- **Weekly individual and Administrative supervision to I&A specialists.** Individual supervision sessions emphasize specific I&A specialist performance issues, challenging client issues and offers guidance for maintaining quality I&A services. In addition, individual supervision provides a forum to address and improve charting and documentation issues.

- **Quarterly meetings with I&A supervisors** to ensure coordination between the Citywide I & A specialist supervisor and the day to day I&A supervisors in order to make programs more effective and avoid any problems of “dual supervision.” Additional meetings with on-site I&A supervisors may be requested.

- **Develop and maintain outreach plan and materials for I&A specialist collaborative.** The plan will identify targets for increased utilization of ADRC services in historically underserved neighborhoods, as identified by prior year contract reporting from DAAS. In order to reach those targets, the plan will, at a minimum, develop and identify outreach events in conjunction with other ADRC partners, updating outreach events monthly. Arrange for the execution of outreach events, providing outreach through presentations and fairs, and partnering with I&A staff and/or DAAS to staff events.

V. Location and Time of Services

Group and Individual supervision, and didactic trainings, will be delivered at each ADRC. Exact schedule and location will be determined in conjunction with the I&A specialists and their supervisors. The supervisor will work with I&A staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. A specialist supervisor is available to meet in a large group format and on an individual basis with I&A specialist staff. The specifics of either supervision model is worked out with each specific agency. This flexibility allows for the service model to respond to the culture of each organization.

VI. Service Objectives

- On a monthly basis, Grantee will monitor each outstation's service units to identify where outreach is needed.
- On a monthly basis, Grantee will compile and publish an outreach calendar that includes outreach fairs and presentations, getting input from all outstations.
- Grantee will coordinate and/or execute outreach events, including a minimum of one (1) presentation and one (1) fair monthly. Supervisor will either attend or have an I&A worker from outstations attend these events.
- Grantee shall host group supervision meetings.
- On a weekly basis, Grantee will provide individual supervision with I+R staff.
- Meet with on-site supervisors to discuss supervision roles.

VII. Outcome Objectives

- At least 85% of I & A specialists in the group responding to a satisfaction survey will be satisfied with the service and find the service beneficial. The satisfaction survey will be administered by the DAAS contract monitor during a group meeting or via email.
- At least 85% of I & A day-to-day supervisors in the group responding to a satisfaction survey will respond that this program helped improve service delivery to clients at their agency. The satisfaction survey will be administered by the DAAS contract monitor during a group meeting or via email.
- Achieve 100% of the service level targets of the outreach plan.

VIII. Reporting Requirements

A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON (Contracts, Administration, Reporting, and Billing Online) database by the 15th of the following month.

B. Grantee will provide a quarterly report of activities, referencing the tasks as described in Section VII & VIII - Service and Outcome Objectives. Grantee will enter the quarterly metrics in the CARBON database by the 15th of the month following the end of the quarter.

C. Grantee will provide an **annual** report summarizing the contract activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

D. Grantee will provide Ad Hoc reports as required by the Department.

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

Martha Huettl, Intake Services Manager
Department of Aging and Adult Services
1650 Mission St, 5th floor
San Francisco, CA 94103
Email: martha.huettl@sfgov.org

Victoria Chan, Contract Manager (GB25)
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email: victoria.chan@sfgov.org

IX. Monitoring Activities

A. Program Monitoring: Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives.

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

	B	C	D
2	Appendix B, Page 1		
3	Document Date: 3/7/2017		
4	HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY		
5			
6	Contractor's Name	Term	
7	Institute on Aging	07/01/2017-06/30/2018	
8	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>		
9	Program: Citiwide I&A Specialist Supervisor		
10	Budget Reference Page No.(s)		Total
11	Program Term	7/1/17-6/30/18	7/1/17-6/30/18
12	Expenditures		
13	Salaries & Benefits	\$86,772	\$86,772
14	Operating Expense	\$10,678	\$10,678
15	Subtotal	\$97,450	\$97,450
16	Indirect Percentage (%)	15%	15%
17	Indirect Cost (Line 16 X Line 17)	\$14,618	\$14,618
18	Capital Expenditure	\$0	\$0
19	Total Expenditures	\$112,068	\$112,068
20	HSA Revenues		
21	General Fund	\$98,620	\$98,620
22	CFDA 93.778, Medi-Cal	\$13,448	\$13,448
23			
24			
25	TOTAL HSA REVENUES	\$112,068	\$112,068
26	Other Revenues		
27			
28			
29			
30			
31			
32	Total Revenues	\$112,068	\$112,068
33	Full Time Equivalent (FTE)		1.07
35	Prepared by: Laura Liesem, Regional Director	Date 3/7/2017	
36	HSA-CO Review Signature:		
37			

	A	B	C	D	E	F
1						Appendix B, Page 2
2						Document Date: 3/7/2017
3						
4	Program: Citiwide I&A Specialist Supervisor					
5	(Same as Line 9 on HSA #1)					
6						
7	Salaries & Benefits Detail					
8						
9						
10						
11		Agency Totals		For HSA Program		TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	7/1/17-6/30/18
13	ADRC Supervisor	\$63,677	100%	100%	100%	\$63,677
14	Director of Community Programs	\$82,000	100%	7%	7%	\$5,740
15						
16						
17						
18						
19	TOTALS	\$145,677	2.00	1.07	1.07	\$69,417
20						
21	FRINGE BENEFIT RATE	25%				
22	EMPLOYEE FRINGE BENEFITS	\$36,419				\$17,355
23						
24						
25	TOTAL SALARIES & BENEFITS	\$182,097				\$86,772
26						

	A	B	C	D	E	F	G
1	Appendix A, Page 3						
2	Document Date: 3/7/2017						
3							
4	Program: Citiwide I&A Specialist Supervisor						
5	(Same as Line 9 on HSA #1)						
6							
7	Operating Expense Detail						
8							
9							
10							
11							
12	<u>Expenditure Category</u>	TERM	<u>7/1/17-6/30/18</u>				TOTAL <u>7/1/17-6/30/18</u>
13	Rental of Property		\$5,860				\$5,860
14	Office Supplies, Postage		\$450				\$450
15	Insurance		\$2,350				\$2,350
16	Staff Travel-(Local & Out of Town)		\$600				\$600
17	Equipment Data Plan		\$418				\$418
18	Outreach support (events participation, flyers & signage)		\$1,000				\$1,000
19							
20							
21							
22	TOTAL OPERATING EXPENSE		\$10,678				\$10,678
23							
24							