



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

Office of Early Care  
and Education

P.O. Box 7988  
San Francisco, CA  
94120-7988  
[www.SFHSA.org](http://www.SFHSA.org)



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

**MEMORANDUM**

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** KELLY DEARMAN, EXECUTIVE DIRECTOR

**FROM:** CINDY KAUFFMAN, DEPUTY DIRECTOR  
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS DS  
EL

**DATE:** JULY 7, 2021

**SUBJECT:** GRANT RENEWAL: **FELTON INSTITUTE** (NON-PROFIT) FOR THE PROVISION OF THE COMMUNITY LIAISONS PROGRAM

<b>GRANT TERM:</b>	<u>Current</u> 7/1/18- 6/30/21	<u>New</u> 7/1/21- 6/30/23	<u>Contingency</u>	<u>Total</u>
<b>TOTAL AMOUNT:</b>	\$181,781	\$121,152	\$12,115	\$133,267

<b>ANNUAL AMOUNT:</b>	<u>FY21-22</u>	<u>FY22-23</u>
	\$60,576	\$60,576

<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$121,152			\$12,115	\$133,267
<b>PERCENTAGE:</b>	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to renew the existing grant agreement with Felton Institute for the period from July 1, 2021 through June 30, 2023, in the amount of \$121,152 plus a 10% contingency for a total grant amount not to exceed \$133,267. The purpose of this grant is to recruit and place part-time “Community Liaison” staff in project-based placements with community based organizations serving older adults and adults with disabilities.



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**Background**

The Community Liaisons program launched in 2016 as an effort to enhance services at the opening of the DAS Benefits and Resource Hub at 2 Gough St. The DAS Benefits and Resource Hub was established to serve as a ‘brick and mortar’ service center for older adults and adults with disabilities of San Francisco needing to access benefit information and the variety of services administered by the Department of Disability and Aging Services.

Placement of part time Community Liaisons within the service center sought to help visitor experience by offering peer based greeting and navigation support to those seeking information and services. For the Community Liaisons themselves, the program offered meaningful employment opportunities and utilized their existing skills and experience to benefit the community.

With the onset of the coronavirus pandemic and City’s shelter-in-place order, the DAS Benefits and Resource Hub initially closed to all walk-up visitors. This rendered the Community Liaisons program, in its initial form, unable to operate. However, rather than just ceasing operations, Grantee Felton Institute quickly pivoted program operations. Since March of 2020, Community Liaisons have instead plugged in to a variety of community-based projects helping raise awareness of and enhance the network of services for older adults and adults with disabilities.

Community Liaisons helped with DAS organized wellness calls in 2020, reaching out via phone to the most vulnerable in order to check in on their needs, inform them about the coronavirus, and provide information about new and existing support services that might be relevant to their situation. They have continued to offer this service in support of a community based case management program. Community Liaisons have supported a variety of other efforts over the past year, including providing translation assistance for a monthly community center newsletter, providing hosting and technical support for virtual events, providing 1:1 technology support as needed for program participants, and leading virtual community activities.

This program pivot has been one of the successful program shifts during 2020 and is something that the Department would like to continue to explore over the next two years of this contract.

While the DAS Benefits and Resource Hub has begun to reopen to in-person services, the Community Liaisons program will remain in community. Community Liaison assignments will continue through specific project-based efforts. This shift in program model will allow for greater variation in tasks and



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assistance to which the Community Liaisons can be assigned. Community Liaison assignments moving forward will be designed to ensure that they are either enhancing existing services or raising awareness of and access to services offered to older adults and adults with disabilities.

**Services to be Provided**

Grantee will administer all aspects of the DAS Community Liaisons program as described in the Appendix A, attached. This will include recruitment, training, employment, and supervision of Community Liaison participants. With the shift in program model, Grantee will now additionally work to develop and detail community placements for program participants.

Grantee will define placement project responsibilities and work to ensure appropriate and safe roles for Community Liaison participants. Program placements will be described and documented through completion of project plans for each placement. Project plans will include description of deliverables and impact of Community Liaison assistance.

On an annual basis, Grantee agrees to create Community Liaison roles for at least 4 unduplicated individuals and 1,875 working hours staffed by the Community Liaison participants.

**Grantee Performance**

Fiscal Monitoring: A Citywide Fiscal and Compliance Monitoring was conducted in February of 2019. There were no findings identified in the monitoring and the grantee is in compliance with performance and monitoring requirements.

Program Monitoring: Annual program monitoring for FY20/21 occurred in May 2021 and resulted in no findings. The program is in full compliance.

**Selection**

Grantee was selected through Request for Proposals #782, which was competitively bid in March 2018.

**Funding**

This grant will be funded entirely through City and County General funds.

**ATTACHMENTS**

- Appendix A – Services to be Provided
- Appendix B – Program Budget

## APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

### Felton Institute

#### Community Liaisons

**Effective July 1, 2021 to June 30, 2023**

### **I. Purpose of Grant**

The purpose of this grant is to recruit and place part-time “Community Liaison” staff in project-based placements with community based organizations serving older adults and adults with disabilities. The project assignments to be developed and staffed by Grantee will help enhance access and awareness to services for older adults and adults with disabilities. Through the hiring of older adults and adults with disabilities to serve as “Community Liaisons,” this program will provide meaningful employment opportunities for participants and utilize their skills and insights in supporting grant purpose.

### **II. Definitions**

Adult with a Disability	A person 18-59 years of age living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.

Grantee	Felton Institute
HSA	Human Services Agency of the City and County of San Francisco
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. (Source: California Code of Regulations, Title 22, Sec. 7130.)
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OCP	Office of Community Partnerships, part of the Department of Disability and Aging Services
Senior	Person who is 60 years or older, used interchangeably with older adult.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve ( <i>Chapter 104, Sections 104.1 through 104.9.</i> )
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving employment through Grantee’s Community Liaison program and reflected via enrollment in CA GetCare.

### III. Target Population

Project assignments under this grant should be designed to benefit the target population. Target population is older adults and adults with disabilities (aged 18-59) who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited or non-English speaking
- Minority
- Frail
- Member of the LGBTQ+ community

#### **IV. Eligibility for Participation as a Community Liaison**

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

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

Program administration will be based at Grantee offices located at 1388 Sutter Street, Suite 600 in San Francisco and open during regular business hours, Monday through Friday, 8 am – 5 pm. Community Liaison placements will occur both on and off-site with varying hours. Grantee will maintain a current roster of all placements including location, times, and types of services provided by Community Liaison. Current placement roster will be available for review upon request throughout the grant period.

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

Grantee will administer all aspects of the DAS Community Liaisons program and the recruitment, training, employment, and supervision of Community Liaison participants. Grantee will include, at minimum, the following qualifications in hiring of Community Liaisons:

- Resident of San Francisco
- Meet tuberculosis protocols;
- Willing to accept supervision as required;
- Willing to serve from 4 to 20 hours per week;
- Willing to receive pre-service orientation training before assignment and ongoing in-service training thereafter

Grantee will develop standardized template for Community Liaison placement documenting the scope, time commitment, and purpose of placement. Template will also include documentation of ongoing progress and outcomes of placement including deliverables or other measurable impact. Grantee will maintain this record of each placement for review during grant period. Standardized template shall be reviewed and pre-approved by OCP Program Analyst at the time of implementation, i.e. start of the grant period.

Grantee will administer an annual client survey, pre-approved by Office of Community Partnership's staff, to every client employed through the Community Liaison program. Grantee will develop and administer a project placement survey, pre-approved by Office of Community Partnership staff, to be completed by non-Grantee leadership level staff at project placement site. Both surveys will measure engagement and impact of program from these two perspectives.

Examples of past project placements and future possibilities include:

- Conducting wellness calls to clients on behalf of DAS and community based organizations
- Assist with the DAS Resource Directory update process
- Assist with DAS outreach activities including off-site events
- Facilitation of community programs and activities
- Providing hosting and technical support for virtual activities
- Assessment of digital literacy need for individuals
- Provide 1:1 technical support to older adults or adults with disabilities seeking assistance with use of computers and smart phones
- Translation services
- Development and distribution of activity calendars and newsletters
- New projects to be developed by Grantee

## **VII. Service Objectives**

On an annual basis, the Grantee will work toward creating employment opportunities for seniors and younger adults living with a disability by meeting the following service objectives:

- Provide at least **1875** hours of cumulative Community Liaisons staffing time at community based assignments. This calculation is based on an average of **37.5** hours of staffing time for each week of operation, and 50 weeks of staffing time during grant year.
- Provide Community Liaisons employment to at least **4** unduplicated consumers.

## **VIII. Outcome Objectives**

On an annual basis and as needed, Grantee will report progress towards meeting the following outcome objectives:

- In an annual client survey, at least 75% of Community Liaisons will report that this program has helped improve their lives.
- In an annual client survey, at least 75% of Community Liaisons will report that they would like to continue in this program.
- In post-placement survey, at least 75% of placement respondents will report that the Community Liaison placement helped enhance service offerings.
- In post-placement survey, at least 75% of placement respondents will report the Community Liaison placement helped increase awareness and access of services.

## **IX. Reporting Requirements**

- A. Grantee will enter into CA GetCare the Community Liaison participant's information and monthly service levels by the 5<sup>th</sup> working day of the month for the preceding month's services.
- B. Monthly reports must be entered into the Contracts Administration, Billing and Reporting Online (CARBON) system for each unit of service delivered during the reporting period for each service listed in Section VII of the Services to be Provided.

- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- D. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to Appendices F & G to the Grant Agreement.
- E. Grantee program staff and participants will complete Elder Abuse awareness training on an annual basis; Grantee will maintain evidence of completion of this training.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training, or OCP analyst approved comparable training, on an annual basis; Grantee will maintain evidence of completion of this training.
- G. Grantee will provide results of annual program participant survey to OCP analyst by March 15 each grant year.
- H. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAS/HSA. The due date for submitting the annual summary report is July 10th.
- I. Grantee shall develop and deliver ad hoc reports as requested by HSA, DAS and OCP staff.
- J. Apart from reports requested to be sent to the Program Analyst or the Contract Manager, all other reports and communications should be sent to the following addresses:

Rocio Duenas  
Contracts Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120  
rocio.duenas@sfgov.org

Michael Zaugg  
DAS, Office of Community Partnerships  
P.O. Box 7988  
San Francisco, CA 94120  
michael.zaugg@sfgov.org

**X. Monitoring Activities**

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



current board roster and selected board minutes for compliance with the Sunshine Ordinance, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
 BY PROGRAM**

Name <b>Felton Institute</b>		Term <u>7/1/21-6/30/23</u>	
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
If modification, Effective Date of Mod.		No. of Mod.	
<b>Program: Community Liaison Program</b>			
Budget Reference Page No.(s)			
Program Term	7/1/21-6/30/22	7/1/22-6/30/23	Total
<b>Expenditures</b>			
Salaries & Benefits	\$51,658	\$51,658	\$103,316
Operating Expenses	\$1,017	\$1,017	\$2,034
<b>Subtotal</b>	<b>\$52,675</b>	<b>\$52,675</b>	<b>\$105,350</b>
Indirect Percentage (%)	15.00%	15.00%	15.00%
Indirect Cost	\$7,901	\$7,901	\$15,802
Subcontractor/Capital Expenditure			
<b>Total Expenditures</b>	<b>\$60,576</b>	<b>\$60,576</b>	<b>\$121,152</b>
<b>HSA Revenues</b>			
General Fund	\$60,576	\$60,576	\$121,152
<b>Total HSA Revenue</b>	<b>\$60,576</b>	<b>\$60,576</b>	<b>\$121,152</b>
<b>Other Revenues</b>			
<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$60,576</b>	<b>\$60,576</b>	<b>\$121,152</b>
Full Time Equivalent (FTE)			
Prepared by:	Ray Mallett	Telephone No.:	Date: 4/19/2021
HSA-CO Review Signature: _____			
<b>HSA #1</b>			

Program: Community Liaison Program

Appendix B, Page 2  
Document Date: 6/21/21

**Salaries & Benefits Detail**

Position	Agency Totals		HSA Program		DAS budgeted salary		
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	7/1/21-6/30/22	7/1/22-6/30/23	Total
Program Manager	\$70,000	1.00	7.00%	0.01	\$924	\$924	\$1,848
Community Liaison	\$39,000	0.24	100.00%	0.24	\$9,360	\$9,360	\$18,720
Community Liaison	\$39,000	0.24	100.00%	0.24	\$9,360	\$9,360	\$18,720
Community Liaison	\$39,000	0.24	100.00%	0.24	\$9,360	\$9,360	\$18,720
Community Liaison	\$45,000	0.53	45.00%	0.24	\$10,733	\$10,733	\$21,466
<b>Totals</b>	<b>\$232,000</b>	<b>2.25</b>	<b>352.00%</b>	<b>0.97</b>	<b>\$39,737</b>	<b>\$39,737</b>	<b>\$79,474</b>
Fringe Benefits Rate	30.00%						
Employee Fringe Benefits	\$69,600				\$11,921	\$11,921	\$23,842
<b>Total Salaries and Benefits</b>	<b>\$301,600</b>				<b>\$51,658</b>	<b>\$51,658</b>	<b>\$103,316</b>
<b>HSA #2</b>							<b>4/19/2021</b>

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

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 Document Date: 6/21/21

**Operating Expense Detail**

<u>Expenditure Category</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>Total</u>
Rental of Property			
Utilities (Elec, Water, Gas, Phone, Garbage)			
Program:			
Building Maintenance Supplies and Repair			
Office supplies, Printing and Reproduction	\$342	\$342	\$684
Insurance			
Staff Training	\$300	\$300	\$600
Staff Travel-(Local & Out of Town)	\$375	\$375	\$750
Rental of Equipment			
<u>Consultant</u>			
<u>Other</u>			
<b>Total Operating Expenses</b>	<b>\$1,017</b>	<b>\$1,017</b>	<b>\$2,034</b>

**HSA #3** **4/19/2021**