



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
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www.SFHSA.org

MEMORANDUM

TO:	DISABILITY AND AGING SERVICES COMMISSION
THROUGH:	KELLY DEARMAN, EXECUTIVE DIRECTOR
FROM:	CINDY KAUFFMAN, DEPUTY DIRECTOR ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS
DATE:	NOVEMBER 3, 2021
SUBJECT:	GRANT MODIFICATION: MULTIPLE PROVIDERS (NON-PROFIT) TO INCREASE SUPPORT TO LGBTQ+ COMPASSIONATE SERVICES (Please see details below)
GRANT TERM:	Please see tables on pages 3 and 4

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The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant agreements with multiple providers for the period of July 1, 2021 to June 30 2023, in the additional amount of \$274,638 plus a 10% contingency for a combined revised total amount not to exceed \$2,431,306. The purpose of these modifications are to increase staffing support to LGBTQ+ compassionate services.



London Breed
Mayor

Trent Rhorer
Executive Director

Background

Curry Senior Center – Community Services

Community connection and engagement is critical to the health, functioning, and increased quality of life for older adults and adults with disabilities in San Francisco. DAS funds Community Centers located throughout San Francisco to provide community services programming intended to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities.

Community services program and activity offerings at DAS funded Community Centers are designed to engage with the community around them while enhancing the cultural, educational, mental, and physical well-being of participants. Community Centers are also the entry point for many older adults and adults with disabilities in need of information and support services, thus translation and social services are available through community services programming.

Shanti Project – Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities

The San Francisco LGBTQ+ Aging Policy Task Force was convened in 2012 by the Board of Supervisors to evaluate the needs of LGBTQ+ seniors, to assess the capacity of the current support system to meet those needs, and to make recommendations to address any unmet needs. Findings from the Task Force report indicate that LGBTQ+ older adults, when compared to those who identify with the heterosexual population, live with higher rates of physical disabilities, are more likely to live alone, and have lower levels of social support and companionship. These factors lead to significantly higher rates of social isolation, depression, anxiety, and suicidal ideation.

The Task Force reviewed services available in San Francisco which address these issues and found such services to be lacking. The Task Force specifically recommended a program design which utilizes care navigation and peer volunteer support models of service delivery which have had a history of success.

In response to the Task Force recommendations, new programming designed to address social isolation in the LGBTQ+ senior and adult with disability community was introduced in 2016.

Services to be Provided

Curry Senior Center – Community Services

Grantee operates a Community Center space designed to engage with the surrounding community that is welcoming and accessible for older adults and adults with disabilities. Grantee offers a variety of activities and services designed to maintain or improve the quality of life of program participants, and considers the physical, social, psychological, economic, educational, recreational, and/or creative needs of participants. While the Community Center serve as a hub for operations, services take place in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. Grantee serves a diverse group of participants including those from the LGBTQ+ community.

Shanti Project – Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities

Grantee developed and implemented a social isolation prevention program in order to address the emotional, behavioral, health, and social isolation challenges faced by lesbian, gay, bisexual, and transgender older adults and adults with disabilities. Program services include care navigation to help individuals with information, referral, and coordination, peer support that utilizes volunteers to provide outreach and supportive services, and support programming that enhances the emotional and behavioral wellbeing of underserved LGBTQ+ older adults.

Modification

The diverse LGBTQ+ older adult community is an intersectional population with multiple marginalized identities that put them at higher risk of COVID-19 infection and death. With the pandemic, the mental health and isolation crisis that LGBTQ+ seniors were already experiencing has worsened. Additional support in funding is needed to address the gap in client need and to maintain the City's commitment to the most vulnerable individuals during the pandemic.

The additional funding for both programs will help increase staffing support to provide compassionate services that directly address isolation, as well as emotional, behavioral, and health challenges of this population. These services include one-on-one care navigation and participant advocacy, volunteer matching, support groups, and other programming.

Curry Senior Center – Community Services

The additional funding will help increase staffing support for Curry Senior Center's Community Services program by adding one LGBT Program Manager who will be responsible for program design, implementation, and supervision of programming specific to LGBTQ+ participants.

	01/01/2021-06/30/2021	07/01/2021-06/30/2022	07/01/2022-06/30/2023	Total
Current	\$191,336	\$395,011	\$395,011	\$981,358
Modification	\$0	\$123,005	\$23,005	\$146,010
Revised	\$191,336	\$518,016	\$418,016	\$1,127,368
Funding %				
Local	86%	86%	86%	
Federal	14%	14%	14%	
			10% contingency	\$112,737
			Not-to-Exceed	\$1,240,105

Shanti Project – Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities

The additional funding will help increase staffing support for Shanti's Isolation Prevention Services by adding one Care Navigator who will conduct intake, follow-up, ongoing assessment, information and referral, care coordination, peer support matches, support group facilitation, and peer-based psychosocial support.

	07/01/2021-06/30/2022	07/01/2022-06/30/2023	Total
Current	\$477,141	\$477,141	\$954,282
Modification	\$114,314	\$14,314	\$128,628

Revised	\$591,455	\$491,455	\$1,082,910
Funding % Local	100%	100%	
		10% contingency	\$108,291
		Not-to-Exceed	\$1,191,201

Total

	Curry Senior Center Community Services	Shanti Project Isolation Prevention	Total
Current	\$981,358	\$954,282	
Modification	\$146,010	\$128,628	\$274,638
Revised	\$1,127,368	\$1,082,910	
10% contingency	\$112,737	\$108,291	
Not-to-Exceed	\$1,240,105	\$1,191,201	\$2,431,306

Selection

Curry Senior Center was selected through Request for Proposal (RFP) #785 issued in February 2018

Shanti Project was selected through Request for Proposal (RFP) #937 issued in April 2021

Funding

Funding for Curry Senior Center's Community Services grant is provided through a combination of Federal Fund, and City and County General Fund, including Dignity Fund.

Funding for Shanti Project's Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities grant is provided through City and County General Funds, including Dignity Fund.

ATTACHMENTSCurry Senior Center – Community Services

Appendix A-1, Scope of Services

Appendix B-1, Budget

Shanti Project – Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities

Appendix A-1, Scope of Services

Appendix B-1, Budget

APPENDIX A -1 – SERVICES TO BE PROVIDED

Curry Senior Center

COMMUNITY SERVICES

Effective January 1, 2021 to June 30, 2023

I. Purpose

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

II. Definitions

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

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

III. Target Population

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

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

IV. Eligibility for Community Services

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

V. Location and Time of Services

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

VI. Service Description

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

There are four categories of services:

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

information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.

4) Enhanced Outreach – While there is an expectation that Community Centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from the Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

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

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

VII. Contractor Responsibilities

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

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

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

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

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

VIII. Service Objectives

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

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

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

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

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

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

IX. Outcome Objectives

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

X. Reporting and Other Requirements

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

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

Theresa Ballesteros
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
Theresa.ballesteros@sfgov.org

or

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

XI. Monitoring Activities

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

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Curry Senior Center									
(Check One) New ___ Renewal ___ Modification <u>X</u> ___							Term 01/01/2021 - 06/30/2023		
If modification, Effective Date of Mod. No. of Mod.									
Program: Community services									
Budget Reference Page No.(s)									
Program Term		1/1/21 - 6/30/21	7/1/21 - 6/30/22		7/1/22 - 6/30/23			Total	
		Revised	Budget	Modification	Revised	Budget	Modification	Revised	
Expenditures									
Salaries & Benefits		\$134,856	\$268,446	\$94,311	\$362,757	\$268,446	\$18,259	\$286,705	\$784,318
Operating Expense		\$17,610	\$47,216	\$12,650	\$59,866	\$47,216	\$1,746	\$48,962	\$126,438
Subtotal		\$152,466	\$315,662	\$106,961	\$422,623	\$315,662	\$20,005	\$335,667	\$910,756
Indirect Percentage (%)		15%	15%		15%	15%		15%	
Indirect Cost (Line 16 X Line 15)		\$22,870	\$47,349	\$16,044	\$63,393	\$47,349	\$3,000	\$50,349	\$136,612
Capital Expenditure		\$16,000	\$32,000		\$32,000	\$32,000		\$32,000	\$80,000
Total Expenditures		\$191,336	\$395,011	\$123,005	\$518,016	\$395,011	\$23,005	\$418,016	\$1,127,368
HSA Revenues									
General Fund		\$155,235	\$310,469		\$310,469	\$310,469		\$310,469	\$776,173
Federal Fund		\$25,271	\$50,542		\$50,542	\$50,542		\$50,542	\$126,355
CODB		\$10,830		\$23,005	\$23,005		\$23,005	\$23,005	\$56,840
LGBT Program Assistant			\$20,500		\$20,500	\$20,500		\$20,500	\$41,000
Transportation			\$13,500		\$13,500	\$13,500		\$13,500	\$27,000
LGBTQ+ Compassionate services				\$100,000	\$100,000				\$100,000
TOTAL HSA REVENUES		\$191,336	\$395,011	\$123,005	\$518,016	\$395,011	\$23,005	\$418,016	\$1,127,368
Other Revenues									
Total DAS and Non DAS Revenue		\$191,336	\$395,011	\$123,005	\$518,016	\$395,011	\$23,005	\$418,016	\$1,127,368
Prepared by:							Date		
HSA-CO Review Signature: HSA #1							_____ 10/25/2016		

Program: Community services
(Same as Line 9 on HSA #1)

Appendix B-1, Page 2
Date: November 2021

Salaries & Benefits Detail

POSITION TITLE	1/1/21 - 6/30/21				7/1/21 - 6/30/22				7/1/22 - 6/30/23			Total				
	Agency Totals		DAS Program		Agency Totals		DAS Program		DAS Program			DAS Program				
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by DAS (Max 100%)	Adjusted FTE	Revised Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budget Salary	Modification	Revised Salary	Budget Salary	Modification	Revised Salary	Budgeted Salary
Senior Center Director	\$93,675	1.00	62.57%	0.63	\$29,305	\$96,488	1.00	58.28%	0.58	\$52,720	\$3,513	\$56,233	\$52,720	\$3,513	\$56,233	\$141,771
Manager-Chinese	\$56,550	1.00	17.68%	0.18	\$5,000	\$58,247	1.00	20.00%	0.20	\$10,000	\$1,649	\$11,649	\$10,000	\$1,649	\$11,649	\$28,298
Program Assistant-Lao	\$40,112	0.53	42.07%	0.22	\$4,500	\$41,315	0.53	45.39%	0.24	\$9,000	\$1,001	\$10,001	\$9,000	\$1,001	\$10,001	\$24,502
Program Assistant-Russian	\$40,112	0.67	33.65%	0.22	\$4,500	\$41,315	0.67	36.31%	0.24	\$9,000	\$1,001	\$10,001	\$9,000	\$1,001	\$10,001	\$24,502
Program Assistant-Vietnamese	\$39,000	0.80	28.85%	0.23	\$4,500	\$40,170	0.80	31.12%	0.25	\$9,000	\$1,001	\$10,001	\$9,000	\$1,001	\$10,001	\$24,502
Program Assistant-Vietnamese	\$39,000	0.69	100.00%	0.69	\$13,520	\$40,170	0.69	100.00%	0.69	\$27,040	\$811	\$27,851	\$27,040	\$811	\$27,851	\$69,222
Program Advocate	\$42,900	1.00	53.05%	0.53	\$11,380	\$42,900	1.00	55.00%	0.55	\$21,680	\$1,915	\$23,595	\$21,680	\$1,915	\$23,595	\$58,570
Program Assistant-Tagalog	\$46,800	0.96	82.82%	0.80	\$18,605	\$48,204	0.96	79.99%	0.77	\$35,940	\$1,078	\$37,018	\$35,940	\$1,078	\$37,018	\$92,641
Program Assistant-LGBT	\$40,950	1.00	56.38%	0.56	\$11,545	\$42,179	1.00	36.69%	0.37	\$13,400	\$2,076	\$15,476	\$13,400	\$2,076	\$15,476	\$42,497
Wellness Program Manager	\$88,725	1.00	5.64%	0.06	\$2,500	\$91,387	1.00	5.47%	0.05	\$5,000		\$5,000	\$5,000		\$5,000	\$12,500
Program Assistant-LGBT				-		\$40,950	0.80	41.86%	0.33	\$13,712		\$13,712	\$13,712		\$13,712	\$27,424
LGBT Program Manager						\$58,500	1.00	100.00%	1.00		\$58,500	\$58,500			\$58,500	\$58,500
				-					-							
				-					-							
TOTALS	\$527,824	8.65	48.3%	4.12	\$105,355	\$641,825	10.45	61.0%	5.28	\$206,492	\$72,545	\$279,037	\$206,492	\$14,045	\$220,537	\$604,929
FRINGE BENEFIT RATE	28.00%					30.00%				30.00%			30.00%			
EMPLOYEE FRINGE BENEFITS	\$147,799				\$29,501	\$179,721				\$61,954	\$21,766	\$83,720	\$61,954	\$4,214	\$66,168	\$179,389
TOTAL SALARIES & BENEFITS	\$675,623				\$134,856	\$821,546				\$268,446	\$94,311	\$362,757	\$268,446	\$18,259	\$286,705	\$784,318
HSA #2																10/25/2016

Program: Community services
(Same as Line 9 on HSA #1)

Appendix B-1, Page 3
Date: November 2021

Operating Expense Detail

TERM	1/1/21 - 6/30/21		7/1/21 - 6/30/22		7/1/22 - 6/30/23		Total	
	Revised	Budget	Modification	Revised	Budget	Modification		Revised
EXPENDITURE CATEGORY								
Rental of Property								
Utilities(Elec, Water, Gas, Phone, Garbage)	\$4,500	\$9,000	\$2,000	\$11,000	\$9,000	\$300	\$9,300	\$24,800
Office Supplies, Postage	\$3,000	\$6,200	\$3,700	\$9,900	\$6,200	\$593	\$6,793	\$19,693
Building Maintenance Supplies and Repair	\$2,300	\$6,047	\$450	\$6,497	\$6,047	\$453	\$6,500	\$15,297
Printing and Reproduction								
Insurance	\$3,200	\$6,100	\$400	\$6,500	\$6,100	\$400	\$6,500	\$16,200
Staff Training								
Staff Travel-(Local & Out of Town)								
Rental of Equipment								
CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
Movement and Meditation	\$1,170	\$2,340		\$2,340	\$2,340		\$2,340	\$5,850
OTHER								
Program supplies	\$2,000	\$3,110		\$3,110	\$3,110		\$3,110	\$8,220
Payroll fees	\$300	\$600		\$600	\$600		\$600	\$1,500
Recruitment	\$300	\$400	\$6,100	\$6,500	\$400		\$400	\$7,200
Computer Support	\$840	\$1,680		\$1,680	\$1,680		\$1,680	\$4,200
Transportation		\$11,739		\$11,739	\$11,739		\$11,739	\$23,478
TOTAL OPERATING EXPENSE	\$17,610	\$47,216	\$12,650	\$59,866	\$47,216	\$1,746	\$48,962	\$126,438
HSA #3								10/25/2016

Program: Community services
(Same as Line 9 on HSA #1)

Appendix B-1, Page 4
Date: November 2021

Program Expenditure Detail

		1/1/21 - 6/30/21	7/1/21 - 6/30/22		7/1/22 - 6/30/23			Total	
		Revised	Budget	Modification	Revised	Budget	Modification	Revised	
EQUIPMENT									
No.	ITEM/DESCRIPTION								
TOTAL EQUIPMENT COST									
OTHER SERVICES									
Description									
St. Anthony's outreach & safety (no indirect)		\$16,000	\$32,000		\$32,000	\$32,000		\$32,000	
TOTAL REMODELING COST		\$16,000	\$32,000		\$32,000	\$32,000		\$32,000	
REMODELING									
Description									
TOTAL REMODELING COST									
TOTAL CAPITAL EXPENDITURE (Equipment and Remodeling Cost)		\$16,000	\$32,000		\$32,000	\$32,000		\$32,000	
HSA #4									10/25/2016

APPENDIX A-1: SERVICES TO BE PROVIDED

Shanti Project

Social Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities July 1, 2021 to June 30, 2023

I. Purpose

Limited supportive services are available to address the emotional, behavioral, health, and social isolation challenges faced by lesbian, gay, bisexual, and transgender older adults and adults with disabilities. This grant seeks to address these issues through the implementation of a program utilizing 1) care navigation, 2) peer support, and 3) supportive programming.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability.
Care Navigation	Includes the following: intake, follow up, on-going assessment, information and referral, on-going care coordination, matching and support of client-volunteer peer support matches, facilitation of peer support volunteer trainings, facilitation of drop-in services, support group facilitation, peer-based psychosocial support (including practical assistance and emotional support).
DAS	Department of Disability and Aging Services (previously Department of Aging and Adult Services/DAAS)
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 to others.
Grantee	Shanti Project
HSA	Human Services Agency

Isolation	For the purpose of this program, isolation is defined as combination of 2 or more of the following factors: self-reported feelings of isolation, mild to moderate depression, lack of natural or reliable supports, chronic illness or conditions, need for emotional and practical support, lack of engagement with available community-based, or other personal support networks, and other additional factors that indicate 1:1 in home and wraparound support would be beneficial
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130
OCP	Office of Community Partnerships (previously Office on the Aging/OOA)
Older Adult	Person who is 60 years or older (used interchangeably with senior)
Peer Support	Includes the use of paid staff, student-interns, and peer support volunteers. Peer support services include emotional and practical support via regular interactions with clients such as social visits, accompaniment to appointments or events, and other assistance.
Senior	Person who is 60 years of age or older (used interchangeably with older adult)

SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Sub-Grantees	Curry Senior Center, Openhouse
Supportive Programming	Includes individual emotional and behavioral support, peer support groups (including abstinence-based and substance-use management groups), social activities, wellness and health education, outreach, and early intervention programs.

III. Target Population

Isolated LGBTQ+ older adults and adults with disabilities who are residents of San Francisco.

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

- Low-income
- Non or limited English speaking
- Minority
- Frail

IV. Description of Services / Units of Service

In response to the limited support services for LGBTQ+ older adults and following the LGBTQ+ Aging Task Force recommendations, Shanti's program "Social Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities" seeks to blend the following three models of service to address the emotional, practical and behavioral health needs of LGBTQ+ older adults and adults with disabilities.

- A. Care Navigation: Care navigators serve as the main point of contact for clients, and provide services including but not limited to intake, follow up, ongoing assessment and care coordination, information and referral, and drop-in facilitation. Care navigators will also help with the development and utilization of peer support volunteers who, in turn, help support clients participating in the program. Care navigators will match peer support volunteers with clients and assist with facilitation of peer support volunteer trainings, support group facilitation, and peer-based psychosocial support (including practical assistance and emotional support).

Care navigator qualifications are based on expertise in providing harm reduction-based coordination, advocacy, and/or psychosocial support to at-risk communities, and therefore these positions are not required to have specific licensure or graduate-level training. Care navigators are evaluated for experience and competence in serving severe need populations and targeted communities.

- B. Peer Support: Peer support volunteers provide outreach and supportive services for isolated, underserved LGBTQ+ older adults and adults with disabilities living with emotional and behavioral health challenges. Use of a peer support network provides an innovative service delivery framework for a target population that may be reluctant to seek traditional health and social services due to a history of discrimination and marginalization.

Grantee will implement an assessment and training program for peer volunteers prior to matching them to clients. Assessment should include evaluation of a volunteer's physical and mental health status and ability to provide support as intended by this program element. Training should be comprehensive and cover cultural competency, boundaries, Aging 101, the grieving process, suicide ideation, clinical issues (including cognitive impairment), psychosocial issues, harm reduction models, and the peer counseling/support model.

- C. Support Programming: This program also seeks to create and increase the number of programs and wellbeing programs that support and enhance the emotional and behavioral wellbeing of underserved LGBTQ+ older adults. These connective programs shall consist of:

- 1) individual emotional and behavioral support,
- 2) peer support groups, including abstinence-based and substance-use management groups, social activities,
- 3) wellbeing and health related education and activities, and
- 4) outreach and early intervention programs

Support programming will be provided by Shanti as well as by sub-grants with Curry Senior Center and Openhouse, both currently offering LGBTQ+-specific community services. Shanti, Curry, and Openhouse will develop, coordinate, and implement social connective programs, activities, and wellbeing and health programs. Enhanced outreach will include efforts in the wider Tenderloin and South of Market communities, to the transgender community and to communities of color.

In delivery of the above program model, the following units of service will be used to measure program performance:

- 1) Unduplicated Consumers. Grantee will provide services to consumers consisting of the target population.
UNIT: One unduplicated consumer.
- 2) Care Navigation. Grantee will provide care navigation services, consisting of: intake, follow up, on-going assessment, information and referral, on-going care coordination, matching and support of client-volunteer peer support matches, facilitation of peer support volunteer trainings, facilitation of drop-in services, support group facilitation, peer-based psychosocial support (including practical assistance and emotional support).
UNIT: One hour of care navigation services.
- 3) Volunteer Recruitment and Development. The service model includes volunteers trained and assigned to work with consumers. Grantee will conduct outreach to draw volunteers

who will then undergo formal training and will make a specified minimum time commitment to the program.

UNIT: One volunteer.

- 4) Peer Support. Grantee will train and coordinate paid staff, student-interns, and peer support volunteers who will provide peer support. Peer support services include emotional and practical support via regular interactions with clients such as social visits, accompaniment to appointments or events, and other assistance.

UNIT: One hour of peer support to consumers.

- 5) Support Programming. Includes individual emotional and behavioral support, peer support groups (including abstinence-based and substance-use management groups), social activities, wellness and health education and training sessions, peer health activities, and early intervention programs.

UNIT: One hour of support programming.

V. Location and Time of Services

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

VI. Service Objectives

On an annual basis, Grantee will meet the following:

Service Objective	FY21-22	FY22-23
Unduplicated Consumers	100	50
Care Navigation Hours	3,000	1,050
Volunteer Recruitment and Development	8	8
Peer Support Hours	1000	1,000
Support Programming Hours	170	170

- At least **thirty-five percent** (35%) of consumers will respond to an annual consumer satisfaction survey.
- At least **fifty percent** (50%) of peer support volunteers will respond to an annual consumer satisfaction survey.

VII. Outcome Objectives

On an annual basis:

- At least **seventy percent** (70%) of consumers responding to an annual consumer satisfaction survey will be satisfied (or better) with services and find it beneficial to them.

- At least **seventy percent** (70%) of peer support volunteers responding to an annual consumer satisfaction survey report that their training was comprehensive and helpful to their program role.
- At least **seventy percent** (70%) of consumers will demonstrate reduced isolation by their engagement in care navigation, volunteer peer support activities, or supportive programming.

VIII. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form by the 5th working day of the month for the preceding month's services.
- B. Grantee will enter into CA-GetCare all the units of service in the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. 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 VI.
- D. 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 the following fiscal year. This report must be submitted to the CARBON system.
- E. 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 within the Grant Agreement.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee will provide an annual consumer satisfaction survey report to OCP by March 15 each grant year.
- H. Grantee shall develop and deliver bi-annual summary reports of SOGI data as requested by DAS/HSA. The due dates for submitting the bi-annual summary reports is January 10 and July 10 each fiscal year.
- I. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- J. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- K. For assistance with reporting requirements or submission of reports, please contact:

Tara Alvarez, Contract Manager
Human Services Agency
P.O. Box 7988
San Francisco, CA 94120-7988
E-mail: ella.lee@sfgov.org

Melissa McGee, Program Manager
Office of Community Partnerships
1650 Mission Street, 5th Floor
San Francisco, CA 94103
Email: melissa.mcgee@sfgov.org

IX. 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; 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; board of director list; and whether services are provided appropriately according to Sections IV, 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 BUDGET SUMMARY
BY PROGRAM**

Shanti Project							Term 7/1/21 - 6/30/23	
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>								
If modification, Effective Date of Mod. _____ No. of Mod. _____								
Program: Social Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities								
Budget Reference Page No.(s)		Modification	Total		Modification	Total		
Program Term	7/1/21 - 6/30/22	100k + CODB	7/1/21 - 6/30/22	7/1/22 - 6/30/23	CODB	7/1/22 - 6/30/23	Total	
Expenditures								
Salaries & Benefits	\$269,946	\$84,482	\$354,428	\$269,946	\$12,447	\$282,393	\$636,821	
Operating Expense	\$51,708	\$14,922	\$66,630	\$51,708		\$51,708	\$118,338	
Subtotal	\$321,654	\$99,404	\$421,058	\$321,654	\$12,447	\$334,101	\$755,159	
Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	
Indirect Cost (Line 16 X Line 15)	\$48,263	\$14,910	\$63,173	\$48,263	\$1,867	\$50,130	\$113,303	
Subcontractor/Capital Expenditure	\$107,224		\$107,224	\$107,224		\$107,224	\$214,448	
Total Expenditures	\$477,141	\$114,314	\$591,455	\$477,141	\$14,314	\$491,455	\$1,082,910	
HSA Revenues								
General Fund	\$477,141		\$477,141	\$477,141		\$477,141	\$954,282	
Addback		\$100,000	\$100,000				\$100,000	
CODB 21/22		\$14,314	\$14,314		\$14,314	\$14,314	\$28,628	
TOTAL HSA REVENUES	\$477,141	\$114,314	\$591,455	\$477,141	\$14,314	\$491,455	\$1,082,910	
Other Revenues								
Total Revenues	\$477,141	\$114,314	\$591,455	\$477,141	\$14,314	\$491,455	\$1,082,910	
Full Time Equivalent (FTE)	3.31	1.10	4.41	3.31			7.72	
Prepared by: Patricia Schnedar	Telephone No:	510-915-0664				Date:	10.14.21	
HSA-CO Review Signature:							10/25/2016	
HSA #2								

Salaries & Benefits Detail

POSITION TITLE	7/1/21 - 6/30/22		7/1/21 - 6/30/22		7/1/22 - 6/30/23		7/1/22 - 6/30/23		Total			
	Agency Totals		DAS Program		DAS Program	Modification	Total	DAS Program	Modification	Total	DAS Program	
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by DAS (Max 100%)	Adjusted FTE	Additional Adj FTE	Budgeted Salary	\$100k + CODB Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	CODB Budgeted Salary	Budgeted Salary
LAASN Program Director	\$84,660	1.00	91%	0.91	0.06	\$77,040	\$5,000	\$82,040	\$77,040	\$3,467	\$80,507	\$162,547
Program Manager	\$61,750	1.00	70%	0.70		\$43,224	\$2,593	\$45,817	\$43,224	\$1,945	\$45,169	\$90,986
Volunteer Services Coordinator	\$53,206	1.00	14%	0.135		\$7,188	\$431	\$7,619	\$7,188	\$323	\$7,511	\$15,130
Care Navigators	\$53,623	2.00	61%	1.225	1.000	\$65,688	\$57,564	\$123,252	\$65,688	\$3,198	\$68,886	\$192,138
Volunteer Services Manager	\$66,300	1.00	27%	0.27	0.04	\$17,904	\$2,500	\$20,404	\$17,904	\$806	\$18,710	\$39,114
Volunteer Services Director	\$104,535	1.00	5%	0.05		\$5,232	\$314	\$5,546	\$5,232	\$235	\$5,467	\$11,013
Deputy Director	\$142,800	1.00	2%	0.02		\$2,856	\$171	\$3,027	\$2,856	\$129	\$2,985	\$6,012
TOTALS	\$566,874	8.00	41%	3.31	1.10	\$219,132	\$68,573	\$287,705	\$219,132	\$10,103	\$229,235	\$516,940
FRINGE BENEFIT RATE	23.2%							23.2%			23.2%	
EMPLOYEE FRINGE BENEFITS	\$131,451					\$50,814	\$15,909	\$66,715	\$50,814	\$2,344	\$53,157	\$119,872
TOTAL SALARIES & BENEFITS	\$698,325					\$269,946	\$84,482	\$354,420	\$269,946	\$12,447	\$282,392	\$636,812
HSA #2												10/25/2016

Program: Social Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disabilities
(Same as Line 9 on HSA #1)

Appendix B-1, Page 3

Operating Expense Detail

EXPENDITURE CATEGORY	TERM	Modification		7/1/22 - 6/30/23	Total	
		7/1/21 - 6/30/22	\$100k + CODB			
Rental of Property		\$10,384	\$3,441	\$13,825	\$10,384	\$24,209
Utilities(Elec, Water, Gas, Phone, Garbage)		\$3,600	\$1,193	\$4,793	\$3,600	\$8,393
Office Supplies, Postage		\$3,200	\$1,060	\$4,260	\$3,200	\$7,460
Building Maintenance Supplies and Repair						
Printing/Graphic Design		\$3,067		\$3,067	\$3,067	\$6,134
Insurance		\$1,440	\$477	\$1,917	\$1,440	\$3,357
Staff Training		\$1,900	\$1,100	\$3,000	\$1,900	\$4,900
Staff Travel-(Local & Out of Town)		\$754	\$250	\$1,004	\$754	\$1,758
IT Support		\$2,700	\$895	\$3,595	\$2,700	\$6,295
<u>CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE</u>						
<u>OTHER</u>						
Client Workshops and Supplies		\$9,500	\$2,000	\$11,500	\$9,500	\$21,000
Client-Related Travel		\$6,195	\$2,000	\$8,195	\$6,195	\$14,390
Wellness Workshop Supplies		\$2,500	\$1,644	\$4,144	\$2,500	\$6,644
Electronic Client Management		\$3,468	\$300	\$3,768	\$3,468	\$7,236
Volunteer and Client Outreach		\$3,000	\$562	\$3,562	\$3,000	\$6,562
TOTAL OTHER		\$24,663	\$6,506	\$31,169	\$24,663	\$55,832
TOTAL OPERATING EXPENSE		\$51,708	\$14,922	\$66,630	\$51,708	\$118,338
HSA #3						10/25/2016

Program: Social Isolation Prevention Services for LGBTQ+ Older Adults and Adults with Disal Appendix B-1, Page 4
(Same as Line 9 on HSA #1)

Program Expenditure Detail

EQUIPMENT		7/1/21 - 6/30/22	7/1/22 - 6/30/23	Total
No.	ITEM/DESCRIPTION			
	n/a			
TOTAL EQUIPMENT COST		\$0	\$0	\$0
SUBCONTRACT / PASS THRU				
	Curry Senior Center	\$49,724	\$49,724	\$99,448
	Openhouse	\$57,500	\$57,500	\$115,000
TOTAL SUBCONTRACT / PASS THRU		\$107,224	\$107,224	\$214,448
REMODELING				
Description				
n/a				
TOTAL REMODELING COST		\$0	\$0	\$0
TOTAL CAPITAL/SUBCONTRACTOR EXPENDITURE (Equipment and Remodeling Cost)		\$107,224	\$107,224	\$214,448
HSA #4				10/25/2016