



Edwin M. Lee, Mayor

Trent Rhorer, Executive Director
Shireen McSpadden, Executive Director

MEMORANDUM

TO: AGING and ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

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

DATE: FEBRUARY 15, 2017

SUBJECT: NEW GRANT: **COMMUNITY LIVING CAMPAIGN (NON-PROFIT) FOR RESERVE (CRSF) EMPLOYMENT SERVICES FOR SENIORS AND ADULTS WITH DISABILITIES**

GRANT TERM: 1/1/17-6/30/19

	<u>New</u>	<u>Contingency</u>	<u>Total</u>		
GRANT AMOUNT:	\$677,400	\$67,740	\$745,140		
ANNUAL AMOUNT:	<u>FY16/17</u>	<u>FY17/18</u>	<u>FY18/19</u>		
	\$177,400	\$250,000	\$250,000		

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
Funding Source					
FUNDING:	\$677,400			\$67,740	\$745,140
PERCENTAGE:	100%				100%

The Department of Aging and Adult Services requests authorization to enter into a new grant agreement with Community Living Campaign (CLC) for the time period starting January 1, 2017 and ending on June 30, 2019, in the amount of \$677,400 plus a 10% contingency for a total amount not to exceed \$745,140. This grant will develop and match seniors and adults with disabilities (AWD) with subsidized job placements.

Background

Seniors and adults aged 18-59 with disabilities constitute nearly 25% of the City of San Francisco’s population. These groups also comprise the largest portion of those living below the poverty level. Seeking improved finances and personal enrichment, many seniors and AWD want to work; they have experience and skills which could be a great resource to employers. Yet, many face a myriad of barriers to meaningful employment.

Through this grant, Grantee will provide part-time employment opportunities to seniors and AWD by placing them at non-profit organizations and businesses in need of their unique experience and skills. This grant will subsidize program participants’ wages in order to incentivize placement opportunities.

Services to be Provided

Grantee has recently entered into an affiliate agreement with ReServe, a national non-profit with expertise in worksite recruitment and job placement. This partnership, known as CLC-SF ReServe or CRSF, allows

Grantee to tap into ReServe's proprietary technology and practices to recruit, match and track part-time and project-based placements.

Through this grant agreement, Grantee will: 1) educate employers on opportunities to hire seniors and adults with disabilities by developing part-time and project-based work arrangements, 2) recruit, screen, and place seniors and adults with disabilities in these employment opportunities, and 3) develop payroll processing and employment guidelines for program participants and reimburse the full or partial cost of employment.

Please note that service units related to job placement under Service Objectives will increase from Year 2 to Year 3 despite the leveling funding from DAAS. The increase in service units reflects Grantee's effort to bring in revenues through contributions from their worksite partners and fundraising, and gradually move toward a self-sustaining model.

Selection

Grantee was selected through Request for Proposals #720, which was competitively bid in November 2016.

Funding

Funding for these grants is provided entirely by the City and County General Fund as a result of the add-back budget process for FY2016-17.

ATTACHMENTS

Appendix A – Services to be Provided

Appendix B – Program Budget

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Effective: January 1, 2017 – June 30, 2019

Community Living Campaign – ReServe (“CRSF”) Employment Services for Seniors and Adults with Disabilities

I. Purpose of Grant

Seniors and adults aged 18-59 with disabilities constitute close to 25% of the City of San Francisco’s population. These groups also comprise the highest percentage of those living below the poverty level. Many seniors and adults with disabilities want to work; they have experience and skills which could be a great resource. The opportunities funded through this grant provide seniors and adults with disabilities with added income, increased connections with others, and a renewed sense of purpose as they contribute to their communities. These lead to better financial security as well as overall wellbeing and mental health.

The purpose of this grant is to develop employment opportunities for seniors and adults with disabilities.

II. Definitions

Adult with Disability (AWD): Person 18 years of age or older living with a disability

DAAS: Department of Aging and Adult Services

CBO: Community Based Organization

DHS: San Francisco Department of Human Services, a division of HSA

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 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: Community Living Campaign

HSA: Human Services Agency of the City and County of San Francisco

OOA: Office on the Aging

Partner: Organization participating in ReServe program, accepting ReServist placement within their organization

ReServist: Senior or AWD placed in employment through participation in this program

Senior: Person who is 60 years or older

III. Target Population

This grant will serve seniors (age 60 and over) and/or adults age 18-59 with disabilities who reside in the City and County of San Francisco with one or more of the following target priorities:

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

IV. Eligibility for Services

Eligibility criteria for services under this program:

- Resident of San Francisco *and*
- Earning less than 300% of the Federal Poverty Level *and*
- Persons aged 60 and above *or*
- Persons 18 years of age or older living with a disability

V. Location and Time of Services

Program will be administered at Community Living Campaign offices, located at 1360 Mission Street, 4th Floor, San Francisco, CA 94103 during regular business hours. Outreach and employment placements will take place throughout the City.

VI. Description of Services to be Provided

Grantee will: 1) educate employers on opportunities to hire seniors and AWD by developing part-time and project-based work arrangements, 2) recruit, screen, and place seniors and AWD in these employment opportunities, and 3) develop and implement payroll processing and employment guidelines for program participants and reimburse the full or partial cost of employment.

1) Worksites Development

- Provide outreach to CBOs, government agencies, and private businesses to develop on-going, part-time (for example: 10 to 20 hours a week) placement or projects, which shall be no shorter than 12 weeks in duration.
- Develop and implement guidelines whereby partners/placements will begin to take on part of the cost of ReServists, allowing for growth of the program.
- Develop in-house knowledge of range of employment services already available to potential program participants in the City of San Francisco.
- Develop and utilize marketing, outreach, and recruitment materials to target potential participating employers.
- Develop and recruit a variety of work sites to accommodate participant's abilities.
- Develop and utilize practices and materials for contracting with employers for project-based and ongoing employment placement of clients.
- Develop and execute work experience agreements with the work site agency, which should include job duties and supervision.
- Provide training and technical assistance to work experience sites to ensure the quality of host site supervision and a positive experience for participants.
- Develop and implement other infrastructure as needed for program function including technical assistance and ongoing support to work sites.
- Develop, administer and collect an annual Satisfaction Survey from employment partners and worksites.

2) Workforce Recruitment

- a. Provide continuous outreach to CBOs, government agencies, and community partners in order to recruit participants.
- b. Develop and implement program eligibility guidelines including maximum income levels for potential participants.
- c. Develop and implement accessible online, phone, and in-person methods for potential clients to apply for program participation.
- d. Develop and implement infrastructure for background checks, assessment, and medical clearance for employment of clients. The cost of background check may be covered by partner sites or Grantee.
- e. Develop and implement infrastructure for evaluation, identification, and referral of program participants to other employment or vocational programs as appropriate.
- f. Place enrolled clients into employment opportunities which meet minimum part-time hourly (for example: 10-20 hours per week) and minimum duration (12 weeks) requirements.
- g. Develop and implement program guidelines designed to maximize unduplicated clients served. Mediate any disputes between worksites and participant, reassigning participant to another worksite if resolution cannot be reached.
- h. Develop, administer and collect an annual Satisfaction Survey from program participants.
- i. Perform other steps as needed to recruit and evaluate clients for placement in employment.

3) Wage Subsidy and Payroll Processing*

- a. Establish and implement payroll processing services appropriate to program function.
- b. Review work schedule and timesheets even if participants perform work at another agency.
- c. Ensure proper levels of workers compensation and other needed insurances for participants.
- d. Provide payroll reports for each pay date detailing each participant paid with participant name, check number, number of hours worked and paid time off hours paid, gross and net wages paid, and year-to-date gross wages and number of hours. Reports to be available within a week of the pay date.
- e. Issue paychecks and W-2s to Participants through a third party payroll.

*Participant wages at an hourly rate shall be in conformance with San Francisco Minimum Compensation Ordinance. Employer FICA, California Unemployment Insurance, and Workers Compensation insurance will be paid by HSA. Only work experience hours actually worked are paid a wage. Paid time-off that complies San Francisco Minimum Compensation ordinance will be paid to participants for work experience.

VII. Service Objectives

On an annual basis, Grantee will work toward creating employment opportunities for seniors and AWD by meeting the following service objectives:

	FY16/17	FY17/18	FY18/19
Minimum number of unduplicated participants enrolled for job placement or referral.	50	100	100
Minimum number of unduplicated ReServists placed in employment lasting at least 12 weeks.	15	30	40
Minimum number of ReServists whose salaries will be at least partially paid by Partners or other non-DAAS sources.	0	6	12
Minimum number of hours of staffing, consisting of hours worked by program participants at job sites.	2,800	8,600	10,000
Minimum number of program enrollees who are referred to other more appropriate employment programs.	30	60	60
Minimum number of recruiting events for participants and partners.	4	8	8

VIII. Outcome Objectives

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

A. Client Satisfaction Outcomes

- At least 80% of program participants will report that this program has helped remove/mitigate barriers to employment.
- At least 80% of program participants will report that this program has helped improve their lives (due to higher earnings, increased employability, meaningful work, less isolation, etc.).
- At least 80% of program participants placed in employment will report that their placement(s) helped them meet their goals for enrolling in the program.
- At least 80% of program participants will report that they would like to continue in this program.

B. Employer Satisfaction Outcomes

- At least 75% of Partners will report that Grantee has been reliable, responsive, supportive and helpful.
- At least 75% of Partners will report being satisfied with the placement or service impact project and the skills, experience, and knowledge of the participants.
- At least 75% of Partners will indicate they plan to continue participation in the program.
- At least 50% of Partners indicated that after their experience in this program, they would consider hiring more Seniors and/or AWD.

C. Employment Retention Outcomes

- On an annual basis, at least 50% of ReServists placed in employment will stay employed during a 12-week period (10+ hours per week) or more.

IX. 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. 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 objective listed in Section VIII.
- 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 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.
- F. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- H. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- I. For assistance with reporting requirements or submission of reports, please contact:

Arata Goto (Worker# GB15)
Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
Arata.Goto1@sfgov.org

Linda Murley (Worker# 6206)
DAAS, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120
Linda.Murley@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 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY CONTRACT BUDGET SUMMARY
BY PROGRAM**

Community Living Campaign - SF Reserve (CRSF) Workforce Program

1/1/17 to 6/30/19

(Check One) New Renewal Modification

If modification, Effective Date of Mod. _____ No. of Mod. _____

Program: CRSF Workforce Program				
Budget Reference Page No.(s)				Total
Program Term	1/1/17-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	1/1/17-6/30/19
Expenditures				
Salaries & Benefits	\$69,063	\$99,000	\$99,000	\$267,063
Operating Expense	\$29,907	\$12,272	\$13,703	\$55,881
Subtotal	\$98,969	\$111,272	\$112,703	\$322,943
Indirect Percentage (%)	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)*	\$14,845	\$16,691	\$16,905	\$48,442
Client Subsidy (Wages, FICA, WC Insurance, etc.)	\$34,644	\$107,340	\$105,837	\$247,822
Third Party Payroll and ReServe Affiliate Setup/ Annual Fee	\$13,791	\$14,697	\$14,555	\$43,043
Capital Expenditure	\$15,150	\$0	\$0	\$15,150
Total Expenditures	\$177,400	\$250,000	\$250,000	\$677,400
HSA Revenues				
General Fund	\$177,400	\$250,000	\$250,000	\$677,400
TOTAL HSA REVENUES	\$177,400	\$250,000	\$250,000	\$677,400
Other Revenues				
CLC Independent Donors/Fundraising	\$600	\$3,000	\$1,200	\$4,800
Foundation & Corporate Grant Revenues	\$10,000	\$12,000	\$20,500	\$42,500
Partner Contributions/Payments	\$0	\$25,920	\$60,480	\$86,400
Total Revenues	\$188,000	\$290,920	\$332,180	\$811,100

Prepared by: Kate Kuckro

Telephone No.: 415-821-1003

Date: 1/17/17

HSA-CO Review Signature:

HSA #1

11/15/2007

**Note: Indirect Cost calculated based on Salaries & Operating Expense less Client Wage Subsidy, ReServe Affiliate and Annual Fees and Third Party Payroll Fees*

Program Name:
CRSF Workforce Program

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		For HSA Program		1/1/17- 6/30/17	7/1/17- 6/30/18	7/1/18- 6/30/19	1/1/17- 6/30/19
	Annual Full Time Salar	Total % FTE	% FTE	Adjusted FTE	For CRSF Budgeted Salary*	For CRSF Budgeted Salary	For CRSF Budgeted Salary	TOTAL 1/1/17 to 6/30/19
	Executive Director	\$75,000	100%	20%	20.0%	\$18,750	\$15,000	\$15,000
Deputy Director	\$71,000	100%	20%	20.0%	\$17,750	\$14,200	\$14,200	\$46,150
Program Coordinator	\$62,500	80%	100%	80.0%	\$18,750	\$50,000	\$50,000	\$118,750
TOTALS	\$208,500	2.80	1.40	1.20	\$55,250	\$79,200	\$79,200	\$213,650
FRINGE BENEFIT RATE	25%							
EMPLOYEE FRINGE BENEFITS	\$52,125				\$13,813	\$19,800	\$19,800	\$53,413
TOTAL SALARIES & BENEFITS	\$260,625				\$69,063	\$99,000	\$99,000	\$267,063
HSA #2								11/15/2007

*Note: Due to Program Start-up, FTE for ED and DD for Year 1 is higher at 50% for 6 months compared to Years 2 and 3
Year 1 salary for Program Coordinator is for 4.5 months at 80% FTE.

Program Name:
CRSF Workforce Program

Operating Expense Detail

Expenditure Category	TERM				TOTAL
		1/1/17-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	1/1/17 to 6/30/19
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)		\$450	\$900	\$900	\$2,250
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction		\$550	\$500	\$500	\$1,550
Insurance					
Staff Training					
Staff Travel-(Local & Out of Town)		\$300	\$600	\$600	\$1,500
Rental of Equipment					
CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE					
Consultant (Diane Kranz)		\$4,800	\$0	\$0	\$4,800
Technical Assistance (Benefits, Workforce Training)		\$4,000	\$1,000	\$1,000	\$6,000
Communications & Outreach Support		\$1,200	\$0	\$400	\$1,600
Program Support Analyst		\$3,250	\$2,500	\$2,500	\$8,250
MISCELLANEOUS					
Marketing Materials Text & Design		\$4,600	\$0	\$1,000	\$5,600
Website and Database		\$5,000	\$0	\$0	\$5,000
Advertising and Outreach		\$827	\$1,000	\$1,000	\$2,827
Background Checks for Social Impact Projects		\$480	\$640	\$640	\$1,760
Computer Software		\$1,200	\$500	\$500	\$2,200
Program Supplies		\$1,150	\$720	\$720	\$2,590
Meeting Expenses		\$2,100	\$3,912	\$3,943	\$9,954
Subtotal - Operating Expenses		\$29,907	\$12,272	\$13,703	\$55,881
OTHER - NO INDIRECT EXPENSES TO BE CHARGED					
Client Wages, FICA, WC Insurance, etc.		\$34,644	\$107,340	\$105,837	\$247,822
NextSource Third Party Payroll		\$3,291	\$10,197	\$10,055	\$23,543
ReServe Affiliate Setup / Annual Fee		\$10,500	\$4,500	\$4,500	\$19,500
Subtotal - Expenses with No Indirect Charges		\$48,436	\$122,038	\$120,392	\$290,865
TOTAL OPERATING EXPENSE		\$78,342	\$134,309	\$134,095	\$346,746

HSA #3

11/15/2007

Program Name:
CRSF Workforce Program

Capital Expenditure Detail
(Equipment and Remodeling Cost)

EQUIPMENT		TERM	1/1/17-6/30/17	7/1/17-6/30/18	7/1/18-6/30/19	TOTAL 1/1/17-6/30/19
No.	ITEM/DESCRIPTION					
	Traveling Laptop Pod (5 laptops, case, hotspot)		\$3,000			\$3,000
	PocketTalker Amplification Devices		\$1,000			\$1,000
	Digital Amplification/Multi-Language Translation System		\$9,000			\$9,000
	Portable PA system, projector and screen		\$1,150			\$1,150
	Adaptive Computer Peripherals		\$1,000			\$1,000
TOTAL EQUIPMENT COST			\$15,150			\$15,150
R E M O D E L I N G						
Description:						
TOTAL REMODELING COST						
TOTAL CAPITAL EXPENDITURE (Equipment and Remodeling Cost)			\$15,150			\$15,150
HSA #4						11/15/2007