



London Breed, Mayor

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

Trent Rhorer, Executive Director

MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

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

DATE: MARCH 6, 2019

SUBJECT: GRANT MODIFICATION: **SENIOR & DISABILITY ACTION.**
 (NON-PROFIT) FOR COMPUTER LAB EQUIPMENT AND SUPPORT

| | | | | | |
|----------------|--------------------|---------------------|--------------------|--------------------|--------------------|
| GRANT TERM: | <u>Current</u> | <u>Modification</u> | <u>Revised</u> | <u>Contingency</u> | <u>Total</u> |
| | 7/1/18- 6/30/19 | 1/1/19- 6/30/19 | 7/1/18- 6/30/19 | | 7/1/18- 6/30/19 |
| TOTAL AMOUNT: | \$216,812 | \$38,855 | \$255,667 | \$25,566 | \$281,233 |
| ANNUAL AMOUNT | <u>FY 18/19</u> | | | | |
| | \$255,667 | | | | |
| Funding Source | <u>County</u> | <u>State</u> | <u>Federal</u> | <u>Contingency</u> | <u>Total</u> |
| MODIFICATION | | | | | |
| FUNDING: | \$38,855 | \$0 | \$0 | \$3,885 | \$42,740 |
| PERCENTAGE: | 100% | 0% | 0% | | 100% |

The Department of Aging and Adult Services requests authorization to modify the existing grant agreement with Senior & Disability Action for the period of January 1, 2019 through June 30, 2019, in the additional amount of \$38,855 plus a 10% contingency for a total amount not to exceed \$281,233. The purpose of this modification is to enhance the current computer lab with new software and hardware, innovative technology, courses and peer support volunteers.

Background

Senior and Disability Empowerment includes the Senior and Disability Survival School and the Senior and Disability University Empowerment programs which are two skills training modules. Senior and Disability Survival School educates older adults and people with disabilities on the

available support and how to access those services. Senior and Disability University Empowerment provides leadership training to enable consumers to advocate for their communities and themselves.

Services to be Provided

Senior & Disability Action's (SDA) project is focused on adults with disabilities of any age. This modification will be used to enhance their computer lab with equipment and accommodations to serve the specific needs of that population. The goal is to create community among adults with disabilities through classes and collective internet-based advocacy. Innovative technology is important to increase access for all students of SDA's Survival School and University programs and will allow for direct training in using the technology to further the larger purposes of the schools, which is empowerment. SDA will meet with accessible technology consultants to identify the most up-to-date and user-friendly hardware and software to draw in and meet the needs of people with mobility, sensory, cognitive, and other disabilities. The technology includes a Closed Circuit TV, a head pointer, voice recognition and word prediction software that will assist people with cognitive, mobility, sensory and other disabilities. Classes in social media advocacy will teach computer skills as well as advocacy skills, and connect people to a community. Other instructional topics will include accessing the internet to search for housing, jobs, and disability related resources and information; Microsoft Office to improve job readiness; and social networking and communications software to reduce isolation and encourage community involvement.

Monitoring

FY17-18 program monitoring took place in March of 2018. The FY17-18 fiscal monitoring took place in May of 2018. The grantee was deemed compliant to contract terms.

Selection

Grantee was selected through RFP #635, which was issued in March 2015.

Funding

The grant will be funded through City and County general funds.

ATTACHMENTS

Appendix A1 – Services to be Provided

Appendix B1 – Budget

APPENDIX A1 – SCOPE OF SERVICES

SENIOR AND DISABILITY ACTION SENIOR AND DISABILITY EMPOWERMENT

July 1, 2018 to June 30, 2019

Modified: March 6, 2019

I. Purpose

The purpose of this grant is to empower older adults and adults with disabilities through a comprehensive overview of community resources and services. Individuals will learn effective public speaking and communication skills. These trainings will help consumers become advocates on their own behalf and to represent the greater senior and adult with disabilities community as well.

II. Definitions

| | |
|-----------------------|--|
| Adult with Disability | Person 18-59 years of age living with a disability. |
| CARBON | Contracts Administration, Reporting and Billing On Line System |
| City | City and County of San Francisco. |
| Controller | Controller of the City and County of San Francisco or designated agent. |
| DAAS | Department of Aging and Adult Services |
| Disability | A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. |
| Empowerment | Two training modules: Senior and Disability Survival School and Senior and Disability University. Classes include activities that help participants learn the various components of independent living: accessing essential services, conflict resolution, leadership, facilitating effective meetings, leadership skills, community organizing, diversity training and political advocacy |
| 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 | Senior and Disability Action (SDA) |
| 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. |
| OCM | Office of Contract Management, Human Services Agency |
| Older Adult | Person who is 60 years or older, used interchangeably with Senior. |
| OOA | Office on the Aging |
| Outreach and Education | The preparation and distribution of materials that inform and advise seniors and adults with disabilities of their housing rights and the opportunities to participate in advocacy coalitions. Efforts will include referrals from former clients, grassroots constituencies, other non-profits, City agencies, as well as direct outreach at tenant gatherings and forums, resource fairs, apartment buildings, and word of mouth, and distributing general flyers at community centers, senior centers, and community-wide festivals. |
| Semester | An SDA academic session; four class days with a singular curriculum each day. |
| Senior & Younger Adults with Disabilities Empowerment Advisory Committee. | An Advisory committee made up of consumers, older adults and adults living with disabilities and advocates. The Advisory Committee meets regularly with the Senior and Disability Survival School and the Senior and Disability University instructors to review class offerings and provide feedback. |
| Senior | Person who is 60 years or older, used interchangeably with Older Adult. |
| Senior & Disability Survival School | A multi-lingual and culturally diverse four-session class that empowers seniors and persons with disabilities in San Francisco. The school aims to provide students with the information, understanding and resources necessary for independent living. |

| | |
|--------------------------------|--|
| Senior & Disability University | A multi-lingual and culturally diverse four session class that empowers seniors and persons with disabilities in San Francisco. The school aims to provide students with formal training on how to affect change in the civic/political process through advocacy and volunteerism. |
| SOGI | Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9). |

III. Target Population

Services must target those seniors 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
- Non or limited –English speaking
- Minority
- Frail
- LGBTQ+

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above, or
- 3) Aged 18 to 59 living with a disability

V. Location and Time of Services

The time, date and location of the Survival School and the University are published well in advance of the sessions. SDA purposefully chooses sites from various communities and neighborhoods to be as inclusive as possible of older adults and persons with disabilities from all sectors of the city. The staff is housed at the SDA headquarters at 1360 Mission St., 4th Floor, San Francisco, CA 94103.

VI. Description of Services

The purpose of SDA’s Empowerment programs is to educate and inform older adults and people with disabilities in understanding and accessing essential services and help them become advocates on behalf of the greater community of which they are a part.

Senior and Disability Survival School

The Senior and Disability Survival School brings consumer information to older adults and people with disabilities throughout San Francisco. Senior and Disability Survival School trains older adults and adults with disabilities to effectively access vital community resources and to exercise their rights when they do. Classes cover: 1) consumer rights training, 2) healthcare and benefits, 3) transportation, and 4) housing. Each session of the Senior and Disability Survival School includes presentations from a variety of service providers, agency representatives, and advocates. Classes are free of cost and offered in neighborhoods throughout San Francisco.

Senior and Disability University

Senior and Disability University is a leadership training program by and for older adults and people with disabilities in San Francisco. Grantee will prepare students to speak in public and engage in the civic/local government process and help connect students to the volunteer and advocacy opportunities that will allow them to make a difference in the community. Classes cover 1) public speaking, 2) community organizing skills, 3) leadership development, and 4) empowerment. Classes are offered in several languages: Chinese, English, Russian and Spanish. Classes are free of cost and offered in neighborhoods throughout San Francisco.

Computer Lab

As an enhancement for both the Senior and Disability Survival School and the Senior and Disability University, Senior and Disability Action will upgrade their computer lab with new software and hardware, innovative technology, courses and peer support volunteers. SDA will meet with accessible technology consultants to identify the most up-to-date and user-friendly hardware and software to draw in and meet the needs of people with mobility, sensory, cognitive, and other disabilities. Technology planned includes a Closed Circuit TV, a head pointer, voice recognition and word prediction software will be assist people with cognitive, mobility, sensory and other disabilities. Instructional topics will include social media advocacy, accessing the internet to search for housing, jobs, and disability related resources and information; Microsoft Office to improve job readiness; and social networking and communications software to reduce isolation and encourage community involvement.

VII: Units of Service Definitions

Senior and Disability Survival School

- 1) Grantee will provide Senior and Disability Survival School classes. A unit is one 3-hour class day. Classes can be part of a larger 'semester' long curriculum or one-day classes provided at and tailored to community partner requests.

UNIT: one 3-hour class day

- 2) Grantee will maintain a minimum of number of students for Senior and Disability Survival School to achieve annual goal.

UNIT: one student

- 3) Grantee in tandem with Senior and Disability University will schedule and conduct meetings of the Senior & Younger Adults with Disabilities Empowerment Advisory Committee.

UNIT: one meeting.

Senior and Disability University

- 1) Grantee will provide classes as part of the Senior and Disability University. A unit is one 3-hour class day. Classes can be part of larger 'semester' long curriculum or one-day classes provided at and tailored to community partner requests.

UNIT: one class day.

- 2) Grantee will maintain a minimum of number of students for Senior and Disability University to achieve annual goal.

UNIT: one student

VIII. Service Objectives

Senior and Disability Survival School

On an annual basis:

- Grantee will serve **100** unduplicated consumers.
- Grantee will provide **16** units of service of 3 hour class days.
- Grantee will maintain an average of **10** students per semester.
- Grantee will conduct **6** Advisory Committee meetings.

Senior and Disability University

On an annual basis:

- Grantee will serve **100** unduplicated consumers.
- Grantee will provide **10** units of service of 3 hour class days.
- Grantee will maintain an average of **20** students per semester.

IX. Outcome Objectives

Senior and Disability Survival School

- 1) At least **50%** of the students completing an annual satisfaction survey will rate themselves as more proficient in accessing services and more likely to do so as part of the Senior & Disability Survival School.
- 2) At least **85%** of consumers completing an annual satisfaction survey will state they are more aware of services and resources for the senior and disabled community.
- 3) At least **85%** of consumers completing an annual satisfaction survey will state that the SDA computer lab was helpful for learning how to use technology to find needed resources and information.
- 4) At least **25%** of the students of the Senior & Disability Survival School will become a volunteer for an existing community or community organization or will participate in a community meeting or public hearing.

Senior and Disability University

- 1) At least 85% of consumers completing an annual satisfaction survey will rate themselves as more aware of the community organizing process.
- 2) At least 95% of the students completing an annual satisfaction survey will feel more comfortable speaking in public and express a willingness to do so.
- 3) At least 85% of consumers completing an annual satisfaction survey will state that the SDA computer lab was helpful for learning how to use technology for community organizing and advocacy.
- 4) At least 50% of the students will become a volunteer for an existing community or community organization or will participate in a public policy process during the contract year.

X. Reporting and Other Requirements

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

- 1) Grantee will enter CA GetCare the consumer data including the Intake Form by the required due date as specified by the OOA.
- 2) The grantee will enter the CA Getcare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- 3) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the Service Objectives.:
- 4) Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis.
- 5) 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.
- 6) Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. Response rate will be at least 35% of contracted unduplicated consumers.
- 7) 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.
- 8) Grantee shall enter into CA GetCare, SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.
- 9) Grantee shall develop and deliver ad hoc reports as requested by DAAS and/or HSA.

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

Rick Appleby
Program Analyst
DAAS, Office on the Aging
PO Box 7988
San Francisco, CA 94120
Rick.appleby@sfgov.org

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
steve.kim@sfgov.org

XI. Monitoring Activities

- 1) 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 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 VIII & IX, 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.
- 2) 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**

| | A | B | C | D | E |
|----|--|----------------|----------------|-----------------------------|-----------------|
| 1 | | | | | |
| 2 | | | | | |
| 3 | HUMAN SERVICES AGENCY BUDGET SUMMARY | | | | |
| 4 | BY PROGRAM | | | | |
| 5 | Name | | | | Term |
| 6 | Senior and Disability Action | | | | 7/1/18-6/30/19 |
| 7 | (Check One) New Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/> -Capacity & Equipment | | | | |
| 8 | If modification, Effective Date of Mod. 1/1/2019 | | No. of Mod. #1 | | |
| 9 | Program: Senior and Disability Empowerment | | | | |
| 10 | Budget Reference Page No.(s) | | MODIFICATION | | REVISED |
| 11 | Program Term | 7/1/18-6/30/19 | 7/1/18-6/30/19 | | TOTAL |
| 12 | Expenditures | | | | |
| 13 | Salaries & Benefits | \$147,657 | \$7,118 | | \$154,775 |
| 14 | Operating Expense | \$41,020 | \$15,772 | | \$56,792 |
| 15 | Subtotal | \$188,677 | \$22,890 | | \$211,567 |
| 16 | Indirect Percentage (%) | 15% | | | 15% |
| 17 | Indirect Cost (Line 16 X Line 15) | \$28,035 | \$5,392 | | \$33,427 |
| 18 | Capital Expenditure | \$100 | \$10,573 | | \$10,673 |
| 19 | Total Expenditures | \$216,812 | \$38,855 | | \$255,667 |
| 20 | HSA Revenues | | | | |
| 21 | General Fund | \$216,812 | | | \$216,812 |
| 22 | OTO - Capacity & Equipment | | \$38,855 | | \$38,855 |
| 23 | | | | | |
| 24 | | | | | |
| 25 | | | | | |
| 26 | | | | | |
| 27 | | | | | |
| 28 | | | | | |
| 29 | TOTAL HSA REVENUES | \$216,812 | \$38,855 | | \$255,667 |
| 30 | Other Revenues | | | | |
| 31 | | | | | |
| 32 | | | | | |
| 33 | | | | | |
| 34 | | | | | |
| 35 | | | | | |
| 36 | Total Revenues | \$216,812 | \$38,855 | | \$255,667 |
| 37 | Full Time Equivalent (FTE) | | | | |
| 39 | Prepared by: Jessica Lehman | | | Telephone No.: 415-546-1333 | |
| 40 | HSA-CO Review Signature: _____ | | | | |
| 41 | HSA #1 | | | | 3/6/2019 |

| | A | B | C | D | E | F | G | H | I |
|----|---|---|-------------|-----------------------|---|---------------------|-----------------------|---|-----------------|
| 1 | Appendix B1, Page 3 | | | | | | | | |
| 2 | | | | | | | | | |
| 3 | | | | | | | | | |
| 4 | Program Name: Senior and Disability Empowerment | | | | | | | | |
| 5 | (Same as Line 9 on HSA #1) | | | | | | | | |
| 6 | | | | | | | | | |
| 7 | Operating Expense Detail | | | | | | | | |
| 8 | | | | | | | | | |
| 9 | | | | | | | | | |
| 10 | | | | | | | | | |
| 11 | | | | | | | | | |
| 12 | <u>Expenditure Category</u> | | <u>TERM</u> | <u>7/1/18-6/30/19</u> | | <u>MODIFICATION</u> | <u>7/1/18-6/30/19</u> | | <u>REVISED</u> |
| 13 | Rental of Property | | | \$16,560 | | \$760 | | | TOTAL |
| 14 | Utilities(Elec, Water, Gas, Phone, Scavenger) | | | \$1,180 | | | | | 7/1/18-6/30/19 |
| 15 | Office Supplies, Postage | | | \$1,187 | | \$50 | | | |
| 16 | Building Maintenance Supplies and Repair | | | | | | | | |
| 17 | Printing and Reproduction | | | \$678 | | | | | \$678 |
| 18 | Insurance | | | \$254 | | | | | \$254 |
| 19 | Staff Training | | | \$1,500 | | | | | \$1,500 |
| 20 | Staff Travel-(Local & Out of Town) | | | \$270 | | | | | \$270 |
| 21 | Rental of Equipment | | | | | | | | |
| 22 | CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE | | | | | | | | |
| 23 | Translation | | | \$11,718 | | | | | \$11,718 |
| 24 | Stipend - senior/disability assistant | | | \$400 | | | | | \$400 |
| 25 | Website & IT | | | \$290 | | \$1,500 | | | \$1,790 |
| 26 | Disability Cultural Center Expenses | | | \$1,900 | | | | | \$1,900 |
| 27 | Peer Trainers/Outreach Specialists | | | | | \$12,960 | | | \$12,960 |
| 28 | OTHER | | | | | | | | |
| 29 | Participant Travel | | | \$10 | | | | | \$10 |
| 30 | Meeting Expenses & Program Supplies | | | \$2,975 | | \$900 | | | \$3,875 |
| 31 | Planning/Fundraising Consultants | | | \$1,700 | | | | | \$1,700 |
| 32 | | | | | | | | | |
| 33 | | | | | | | | | |
| 34 | | | | | | | | | |
| 35 | TOTAL OPERATING EXPENSE | | | \$40,622 | | \$16,170 | | | \$56,792 |
| 36 | | | | | | | | | |
| 37 | HSA #3 | | | | | | | | 3/6/2019 |

| | A | B | C | D | E | F |
|----|---|-----------------------------|----------------|----------------|---|----------------|
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | Program Name: Senior and Disability Empowerment | | | | | |
| 5 | (Same as Line 9 on HSA #1) | | | | | |
| 6 | | | | | | |
| 7 | Program Expenditure Detail | | | | | |
| 8 | | | | | | |
| 9 | | | | MODIFICATION | | TOTAL |
| 10 | EQUIPMENT | TERM | 7/1/18-6/30/19 | 7/1/18-6/30/19 | | 7/1/18-6/30/19 |
| 11 | No. | ITEM/DESCRIPTION | | | | |
| 12 | | Computers & Other Equipment | \$ 100 | \$ 10,573 | | \$ 10,673 |
| 13 | | | | | | |
| 14 | | | | | | |
| 15 | | | | | | |
| 16 | | | | | | |
| 17 | | | | | | |
| 18 | | | | | | |
| 19 | | | | | | |
| 20 | TOTAL EQUIPMENT COST | | \$ 100 | \$ 10,573 | | \$ 10,673 |
| 21 | | | | | | |
| 22 | REMODELING | | | | | |
| 23 | Description: | | | | | |
| 24 | | | | | | |
| 25 | | | | | | |
| 26 | | | | | | |
| 27 | | | | | | |
| 28 | | | | | | |
| 29 | TOTAL REMODELING COST | | | | | |
| 30 | | | | | | |
| 31 | TOTAL CAPITAL EXPENDITURE | | \$ 100 | \$ 10,573 | | \$ 10,673 |
| 32 | (Equipment and Remodeling Cost) | | | | | |
| 33 | HSA #4 | | | | | 3/6/2019 |