



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 AND ADULT SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

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

DATE: MAY 1, 2019

SUBJECT: GRANT MODIFICATION: **SENIOR AND DISABILITY ACTION**
 (NON-PROFIT) FOR THE PROVISION OF HOME CARE
 ADVOCACY, HOUSING ADVOCACY AND COUNSELING, LONG-
 TERM CARE CONSUMER RIGHTS ADVOCACY, AND SENIOR
 AND DISABILITY EMPOWERMENT
 See table below

GRANT TERM:	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
	7/1/18- 6/30/19	7/1/19- 6/30/20	7/1/18- 6/30/20		7/1/18- 6/30/20
TOTAL AMOUNT:	\$670,208	\$588,308	\$1,258,516	\$125,849	\$1,384,365
ANNUAL AMOUNT	<u>FY 18/19</u>	<u>FY 19/20</u>			
	\$670,208	\$588,308			
Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
MODIFICATION FUNDING:	\$588,308	\$0	\$0	\$58,830	\$647,138
PERCENTAGE:	100%	0%	0%		100%

The Department of Aging and Adult Services (DAAS) requests authorization to modify the existing grant agreements with Senior and Disability Action (SDA) for the following programs: 1) Home Care Advocacy, 2) Housing Advocacy and Counseling, 3) Long-Term Care Consumer Rights Advocacy, 4) Senior and Disability Empowerment, for the time period of July 1, 2019 through June 30, 2020, in the additional amount of \$588,308 plus a 10% contingency for a total amount not to exceed \$647,138.

Program	FY18-19	FY 19-20	FY 18-20 Total	10% Contingency	FY 18-20 Total Not to Exceed
Home Care Advocacy	\$112,461	\$104,794	\$217,255	\$21,725	\$238,980
Housing Advocacy and Counseling	\$174,823	\$162,903	\$337,726	\$33,772	\$371,498
LTCC Rights Advocacy	\$127,257	\$118,581	\$245,838	\$24,583	\$270,421
Senior and Disability Empowerment	\$255,667	\$202,030	\$457,697	\$45,769	\$503,466
TOTAL	\$670,208	\$588,308	\$1,258,516	\$125,849	\$1,384,365

Background

The purpose of these grants is empowerment, advocacy training, and coalition building. The focus is to help older adults and adults with disabilities understand services available to them, understand their rights as consumers, and understand how to ensure these services and rights. Much of the work is accomplished through collaboration building and joint advocacy with consumers, community based organizations, and policy makers.

Grant Modification

This grant modification extends the programs for an additional 12 months.

Services to be Provided

Home Care Advocacy

The Home Care Advocacy program works with consumers, community groups and policy-makers to assist older adults and adults with disabilities in advocating for in-home care essential to living in the community. Home care advocacy convenes two interrelated groups: 1) Healthcare Action Team (HAT) and 2) the In- Home Supportive Services (IHSS) Task Force. HAT is a consumer advocacy group that works to empower seniors and people with disabilities. HAT works directly with consumers to gather their experiences, build leadership, and strategize on issues that affect them. The IHSS Task Force emphasizes the importance of policy-makers remaining connected to those directly affected by the IHSS program. The IHSS Task Force brings together leaders of government agencies, non-profit organizations, and labor representatives with IHSS consumers and providers to facilitate listening, understanding and open communication.

Housing Advocacy and Counseling

The Housing Advocacy and Counseling program works with older adults and adults with disabilities in need of housing, tenant's rights, and Single Room Occupancy hotel ("SRO") matters. This is accomplished through counseling services provided in conjunction with the Housing Rights Committee of San Francisco. Housing advocacy efforts include outreach, education, and coalition building. It also includes participation in public hearings and community forums that advocate for affordable housing, tenant and SRO resident rights.

Long-Term Care Consumer Rights Advocacy (LTCCRA)

The LTCCRA program provides information and training to individuals, family members, caregivers, and agencies on the services guaranteed through long-term care services in San Francisco. LTCCRA facilitates group trainings and drop-in clinics at community hubs and resource fairs. Through a multi-lingual call center at Grantee's offices, the LTCCRA program provides an advice line for referrals, assistance, and follow-up services.

Senior and Disability Empowerment

Senior and Disability Empowerment includes the Senior and Disability Survival School and the Senior and Disability University Empowerment programs that are skills training modules. Senior and Disability Survival School educates older adults and adults with disabilities on the supportive services available to them and how to access those services. Senior and Disability University Empowerment provides leadership training to enable consumers to advocate for their communities and themselves. Sessions are held at Community Centers, public libraries, and housing complexes throughout the City. Classes can be translated into several languages and are free of cost.

A newsletter, **SDA News and Views**, is published each month to give updates to the community on SDA programs and events.

Performance Monitoring

The four SDA programs were monitored in April 2019. Fiscal monitoring was conducted in March 2019. Each program was found in compliance.

Grantee Selections

Grantee was selected through Request for Proposals (RFP) #635, issued February 2015.

Funding

The funding is 100% County General Fund.

Attachments:

Home Care Advocacy

Appendix A1 – Scope of Services to be provided

Appendix B1 – Budget

Housing Advocacy and Counseling

Appendix A2 – Scope of Services to be provided

Appendix B2 – Budget

Long-Term Care Consumer Rights Advocacy

Appendix A3 – Scope of Services to be provided

Appendix B3 – Budget

Senior and Disability Empowerment

Appendix A4 – Scope of Services to be provided

Appendix B4 – Budget

APPENDIX A1 – SCOPE OF SERVICES

**SENIOR AND DISABILITY ACTION
HOME CARE ADVOCACY**

**July 1, 2018 – June 30, 2020
Modification Effective: July 1, 2019**

I. Purpose

Grantee will work with consumers, community groups, unions, and local government, to educate and mobilize older adults and people with disabilities to advocate for critical home care services and form networks of advocacy. This advocacy informs and influences public opinion, media, and government decisions about home care services.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
CARBON City	Contracts Administration, Reporting and Billing On Line System City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult 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 that is determined to be functionally impaired because the individual: (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; and/or (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 others.
Grantee	Senior and Disability Action (SDA)
HSA	Human Services Agency of the City and County of San Francisco
IHSS	In-Home Supportive Services
In-Home Care	Supportive care provided in the home. Care may be provided by healthcare professionals who provide medical care needs or by informal caregivers who provide daily care to help to ensure the activities of daily living (ADL's) are met.

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
OOA	Office on the Aging
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> which 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>)

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 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

Participants in the delivery and enhancement of home care and related health issues that affect the ability of older adults and persons with disabilities to live independently in the community.

V. Location and Time of Services

Home Care Advocacy services are provided at SDA offices, located at 1360 Mission St., 4th Floor, San Francisco, CA 94103. The hours of operation are 9:00 a.m. to 5 p.m., Monday through Friday.

VI. Service Description

Home Care Advocacy includes two main components: Healthcare Action Team (HAT) and the In- Home Supportive Services (IHSS) Task Force.

- 1) HAT is a consumer advocacy group that focuses on mobilizing older adults and people with disabilities. HAT gathers consumer experiences and stories, builds leadership, and takes action on issues that affect the lives of its members. Volunteer HAT members educate the community, meet with local and state legislators, and hold rallies and other public events to inform and influence public opinion, media, and government decisions. Meetings are convened by Senior and Disability Action.
- 2) The IHSS Task Force recognizes the need for decision makers to hear the voices of those directly affected by the IHSS program. The IHSS Task Force brings together leaders of government agencies, non-profit organizations, and labor representatives, along with IHSS consumers and providers. Meetings are convened by Senior and Disability Action.
- 3) A monthly newsletter SDA News and Views is produced to give updates to the community on issues pertaining to home care (i.e., legislative matters, meeting notices, city and/or state budget matters, etc.)

VII. Unit of Service Definitions

- Grantee will hold IHSS Task Force meetings and HAT meetings to address planning and action for home care advocacy.

UNIT: one meeting.

- Grantee will form committees and groups to work as advocates to improve the IHSS delivery system.

UNIT: one committee or group.

- Grantee will provide presentations and outreach activities to educate the public, involve older adults and people with disabilities in Home Care Advocacy.

UNIT: one presentation.

- Grantee will develop relationships with policy makers/legislators, lobbying groups and consumer groups to seek support for IHSS and other home care issues and elicit their participation in impacting the legislative arena.

UNIT: one contact.

- Grantee will develop and create multi-media exposures: news articles, TV or radio talk show appearances, computer exposure, or other creative marketing techniques.

Unit: one exposure.

VIII. Service Objectives

On an annual basis:

- Grantee will convene 9 IHSS Task Force meetings.
- Grantee will convene 5 HAT meetings.
- Grantee will establish 6 strategic committees or alliances.
- Grantee will perform 20 community presentations.
- Grantee will provide 24 contacts in development of Home Care Advocacy relationships.
- Grantee will provide 12 multi-media exposures.

IX. Outcome Objectives

- 1) At least 85% of the participants in the IHSS Task Force will report feeling engaged with the operation and accomplishments of the Task Force.
- 2) At least 85% of the participants in the HAT will report feeling engaged with the operation and accomplishments of the Task Force.
- 3) At least 1000 consumers per month will receive updates via SDA Newsletter and email lists to inform, educate and foster advocacy.

X. Reporting and Other Requirements

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

- 1) 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.
- 2) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the Service Objectives.:
- 3) 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
- 4) 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.
- 5) Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. At least 70% of the participants of the IHSS Task Force will complete the consumer satisfaction survey. At least 70% of the Healthcare Action Team (HAT) will complete the consumer satisfaction survey.

- 6) Grantee shall enter into Getcare, SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- 7) 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.

A

B

C

D

E

F

Appendix B1, Page 1

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name

Term

Senior and Disability Action

7/1/18-6/30/20

(Check One) New Renewal Modification

If modification, Effective Date of Mod. 7/1/2019 No. of Mod. #2

Program: Home Care Advocacy

Budget Reference Page No.(s)

MODIFICATION

REVISED

New

REVISED

Program Term

7/1/18-6/30/19

7/1/18-6/30/19

7/1/18-6/30/19

7/1/19-6/30/20

TOTAL

Expenditures

Salaries & Benefits

\$75,824

\$3,630

\$79,453

\$76,788

\$156,241

Operating Expense

\$15,301

\$3,038

\$18,339

\$14,338

\$32,677

Subtotal

\$91,125

\$6,668

\$97,792

\$91,126

\$188,918

Indirect Percentage (%)

15%

15%

15%

15%

Indirect Cost (Line 16 X Line 15)

\$13,669

\$999

\$14,669

\$13,668

\$28,337

Capital Expenditure

\$0

\$0

\$0

\$0

Total Expenditures

\$104,794

\$7,667

\$112,461

\$104,794

\$217,255

HSA Revenues

General Fund

\$102,238

\$102,238

\$102,238

\$204,476

CODB

\$2,556

\$2,556

\$2,556

\$5,112

OTO - Capacity

\$7,667

\$7,667

\$7,667

TOTAL HSA REVENUES

\$104,794

\$7,667

\$112,461

\$104,794

\$217,255

Other Revenues

Total Revenues

\$104,794

\$7,667

\$112,461

\$104,794

\$217,255

Full Time Equivalent (FTE)

Prepared by: Jessica Lehman

Telephone No.: 415-546-1333

HSA-CO Review Signature: _____

HSA #1

5/1/2019

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													
31													
32													
33													
34													
35													
36													
37													

APPENDIX A2 - SCOPE OF SERVICES

**SENIOR AND DISABILITY ACTION
HOUSING ADVOCACY AND COUNSELING**

July 1, 2018 to June 30, 2020

Modification Effective: July 1, 2019

I. Purpose

The purpose of this grant is to empower older adults and adults with disabilities in the areas of housing and tenant’s rights and Single Room Occupancy hotel (“SRO”) advocacy. This is done through counseling, education and information, community outreach, and civic engagement.

II. Definitions

Adult with a 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, a municipal corporation.
DAAS	Department of Aging and Adult 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 that is determined to be functionally impaired because the individual either: (a) is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision; and/or (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 others.
Grantee	Senior and Disability Action (SDA)
Housing Counseling	Provides information to individuals who believe they are in jeopardy of being evicted and provides assistance to those individuals requiring tenant rights advocacy.
Housing Advocacy	Training of individuals and groups to provide information regarding the need of affordable and accessible senior housing. Development of and participation with coalitions working for housing and tenant rights in San Francisco.

Housing Collaborative	A group of tenants, homeowners, community advocates organizing to preserve and create quality, affordable, accessible housing in San Francisco. There is a monthly meeting to strategize community organizing and policy change.
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
OOA	Office on the Aging
Outreach And Education	Preparation and distribution of materials that inform and advise older adults and adults with disabilities of their housing rights as well as opportunities to participate in advocacy coalitions.
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> which 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>)
SRO	Single room occupancy hotel
SRO Collaborative	Organizations funded by Department of Building Inspection to help organize tenants within the SROs.

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 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 Housing Advocacy and Counseling Services

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

V. Location and Time of Services

SDA administrative and general services are located at 1360 Mission St., Suite 400 in San Francisco, Monday through Friday from 9 a.m. to 5 p.m. Housing counseling services are provided at the Housing Rights Committee's 2 locations: Mission Street Office: 1663 Mission Street with Counseling Hours Monday-Thursday, 1pm-5pm. Call for a Mission Street appointment: 415-703-8644. Human Rights Committee Richmond Office: 4301 Geary Blvd. with Counseling Hours Monday, Wednesday, Thursday and Friday, 9am-12noon (closed Tuesday). Call for a Richmond Office appointment: 415-947-9085.

VI. Services to be Provided

- 1) Education and Outreach: Preparation and distribution of information to help inform older adults and people with disabilities of housing rights and available housing options, and to empower older adults and people with disabilities to advocate for improved housing options.
- 2) Housing Counseling: will help prevent eviction by providing face to face counseling regarding tenant rights.
- 3) Housing Advocacy: support of affordable and accessible housing for older adults and adults with disabilities. Much of the work is done in coalition with other service providers or community groups.
- 4) SRO Advocacy: To help promote supportive services and improved living conditions for older adults and adults with disabilities who reside in SROs.
- 5) Participation in public hearings, community forums, and group meetings for the purpose of advocating about housing issues impacting older adults and/or younger adults with disabilities.
- 6) Convene meetings designed to advocate for supportive services and living conditions for older adults and adults with disabilities residing in SROs.

VII. Unit of Service Definitions

- Grantee will provide counseling assistance to individuals on tenant's rights and eviction prevention issues.

UNIT: one consumer receiving counseling

- Grantee will participate in and facilitate meetings to advocate for housing options for older adults and adults with disabilities and improved living conditions and access to supportive services for SRO residents.

UNIT: one public hearing, meeting, demonstration, information sharing event, or other public gathering.

- Grantee will develop the SRO Senior and Disability Workgroup which will include SRO residents, Housing Collaborative members (see below), the Department of Building Inspection, and other concerned city and community representatives. The purpose of the Workgroup will be to advocate for improved SRO living conditions.

UNIT: one meeting focused on SRO issues.

- Grantee will hold meetings of the Housing Collaborative, bringing together partner agencies with older adults and people with disabilities, to advocate for tenant rights and affordable housing.

UNIT: one meeting of the Housing Collaborative.

- Grantee will involve older adults and people with disabilities in housing and SRO advocacy efforts.

UNIT: one volunteer.

- Grantee will provide outreach to the older adults and people with disability community.

UNIT: one hour of outreach.

VIII. Service Objectives

On an annual basis:

- Grantee will provide counseling to **275** consumers.
- Grantee will participate in and/or facilitate **125** public hearings
- Grantee will convene **10** meetings of the SRO Senior and Disability Workgroup
- Grantee will hold **10** meetings of the Housing Collaborative
- Grantee will involve at least **100** volunteers in housing and SRO advocacy efforts
- Grantee will provide **300** hours of outreach.

IX. Outcome Objectives

- 1) At least 85% of consumers will state that the agency provided accurate and current tenants rights information to help them with their housing issue.
- 2) At least 75% of consumers surveyed report they participated in advocacy activities; attending community meetings, rallies, letter writing, public testimony.
- 3) At least 75% of SRO residents participating with SDA's SRO Advocacy will agree that advocacy efforts are making progress toward improving living conditions.

X. Reporting Requirements

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

- 1) 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.
- 2) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding Service Objectives
- 3) 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.
- 4) Number of consumers satisfied that the agency provided accurate and current tenant rights information to help them prevent eviction or during an eviction proceeding, or to seek affordable housing.
- 5) Number of public hearings, community forums, or meetings held as it relates to housing advocacy issues.
- 6) 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.
- 7) Grantee will provide an annual consumer satisfaction survey report of 35% of contracted consumers served to OOA by March 15 each grant year.
- 8) Grantee shall enter into Getcare, SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.

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
P.O. Box 7988
San Francisco, CA 94120
rick.appleby@sfgov.org

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
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.

	A	B	C	D	E	F
1	Appendix B2, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name					Term
6	Senior and Disability Action					7/1/18-6/30/20
7	(Check One) New Renewal ____ Modification <u> X </u>					
8	If modification, Effective Date of Mod. 7/1/2019 No. of Mod. #2					
9	Program: Housing Advocacy and Counseling					
10	Budget Reference Page No.(s)		MODIFICATION	REVISED	NEW	REVISED
11	Program Term	7/1/18-6/30/19	7/1/18-6/30/19	7/1/18-6/30/19	7/1/19-6/30/20	TOTAL
12	Expenditures					
13	Salaries & Benefits	\$114,383	\$8,619	\$123,002	\$114,975	\$237,977
14	Operating Expense	\$27,272	\$1,746	\$29,018	\$26,680	\$55,698
15	Subtotal	\$141,655	\$10,365	\$152,020	\$141,655	\$293,675
16	Indirect Percentage (%)	15%		15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$21,248	\$1,555	\$22,803	\$21,248	\$44,051
18	Capital Expenditure	\$0		\$0	\$0	\$0
19	Total Expenditures	\$162,903	\$11,920	\$174,823	\$162,903	\$337,726
20	HSA Revenues					
21	General Fund	\$158,930		\$158,930	\$158,930	\$317,860
22	CODB	\$3,973		\$3,973	\$3,973	\$7,946
23	OTO - Capacity		\$11,920	\$11,920		\$11,920
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$162,903	\$11,920	\$174,823	\$162,903	\$337,726
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$162,903	\$11,920	\$174,823	\$162,903	\$337,726
37	Full Time Equivalent (FTE)					
39	Prepared by: Jessica Lehman			Telephone No.: 415-546-1333		
40	HSA-CO Review Signature: _____					
41	HSA #1					5/1/2019

	A	B	C	D	E	F	G	H	I	J	K	L	M		
1	Appendix B2, Page 3														
2															
3	Senior and Disability Action														
4	Program Name: Housing Advocacy and Counseling														
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>	<u>7/1/18-6/30/19</u>		<u>NEW</u>	<u>7/1/19-6/30/20</u>	<u>TOTAL</u>	<u>7/1/18-6/30/20</u>
13	Rental of Property			\$ 12,336					\$ 12,336			\$ 12,336		\$ 24,672	
14	Utilities(Elec, Water, Gas, Phone, Scavenger)			\$ 760					\$ 760					\$ 760	
15	Office Supplies, Postage			\$ 820					\$ 820			\$ 820		\$ 1,640	
16	Building Maintenance Supplies and Repair														
17	Printing and Reproduction			\$ 710					\$ 710			\$ 510		\$ 1,220	
18	Insurance			\$ 627					\$ 627			\$ 627		\$ 1,254	
19	Staff Training			\$ 180		\$ 246			\$ 426			\$ 180		\$ 606	
20	Staff Travel-(Local & Out of Town)			\$ 90					\$ 90			\$ 90		\$ 180	
21	Rental of Equipment														
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE														
23	Subcontract: Eviction Prevention Counseling			\$ 10,500					\$ 10,500			\$ 11,025		\$ 21,525	
24	Translation			\$ 204					\$ 204			\$ 204		\$ 408	
25	Planning/Fundraising Consultants					\$ 1,500			\$ 1,500					\$ 1,500	
26															
27															
28	OTHER														
29	Participant Travel			\$ 105					\$ 105			\$ 100		\$ 205	
30	Meeting Expenses & Program Supplies			\$ 940					\$ 940			\$ 788		\$ 1,728	
31															
32															
33															
34															
35	TOTAL OPERATING EXPENSE			\$ 27,272		\$ 1,746			\$ 29,018			\$ 26,680		\$ 55,698	
36															
37	HSA #3												5/1/2019		

APPENDIX A3 – SCOPE OF SERVICES

**SENIOR AND DISABILITY ACTION
LONG-TERM CARE CONSUMER RIGHTS ADVOCACY
("LTCCRA")**

July 1, 2018 – June 30, 2020

Modification Effective: July 1, 2019

I. Purpose

The purpose of this grant is to provide information and training to individuals, caregivers, and agencies on the basic rights and services guaranteed through long-term care services in San Francisco.

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, a municipal corporation.
DAAS	Department of Aging and Adult 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 that is determined to be functionally impaired because the individual either: (a) is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision; and/or (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 others.
Grantee	Senior and Disability Action (SDA)
HSA	Human Services Agency of the City and County of San Francisco
IHSS	In-Home Supportive Services
Long-Term Care Services	Individualized, coordinated service that enables individual independence, and quality of life. It is common for long-term care to provide assistance with Activities of Daily Living (ADLs) bathing, dressing, eating, toileting. Long-Term Care Services can include services such as In-Home Support Services (IHSS), Adult Daycare, and Caregiver Support.

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.
LTCCC	Long-Term Care Coordinating Council is the single body in San Francisco to advise the Mayor on policy, planning and service delivery issues for older adults and people with disabilities. The LTCCC advises, implements and evaluates issues relating to long term care (LTC) and supportive services, including how different service systems interact.
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
OOA	Office on the Aging
Peer Advocate	A trained consumer who provides a communication bridge between providers and consumers through the call center.
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>)

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 groups that have been identified as demonstrating the greatest economic and social need. In particular:

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

IV. Eligibility for Long-Term Care Consumer Rights Advocacy

- 1) Resident of San Francisco
- 2) Aged 18 and above and in need of or a recipient of long-term care services or
- 3) A family member or care provider to persons eligible for long-term care services.

V. Location and Time of Services

LTCCRA services are provided at SDA offices, located at 1360 Mission St., 4th Floor, San Francisco, CA 94103. The hours of operation are 9:00am to 5pm, Monday through Friday.

VI. Services to be Provided

- 1) Training for consumers and providers on the basic rights and services made available through many programs offering long-term care services in San Francisco.
- 2) Outreach and information sharing including: development of informational materials, discussion sessions, drop-in clinics at community centers, and resource fairs.
- 3) Centralized information and assistance by creating a multi-lingual, consumer-directed call center that is a central advice line, providing problem-solving referrals, assistance and follow-ups.
- 4) Development of peer advocate training and retention practices to establish and retain a core of peer advocates that will provide direct one-to-one support and counseling on long-term care issues.
- 5) Compiling data on consumer contacts and issues that arise and reporting regularly to DAAS and the LTCCC.

VII: Units of Service Definitions

On an annual basis, the Grantee will provide the following services as part of LTCCRA

- 1) Consumer contact which includes:
 - a. Information and Referral: Providing consumers with information on long-term care services available within their communities.
 - b. Assistance and Advocacy: Linking individuals to available services.
 - c. Follow-up: Contacting the consumer to ascertain status of their concern.

UNIT: one consumer contact.

- 2) Outreach activities include: trainings, discussion sessions, drop-in clinics at community centers, resource fairs.

UNIT: one outreach activity

- 3) Status report: a compilation of consumer requests and concerns accrued by the call center and field workshops.

UNIT: unit is one report given to LTCCC.

VIII. Service Objectives

On an annual basis:

- Grantee will serve 250 unduplicated consumers.
- Grantee will provide 650 Contacts.
- Grantee will provide 60 units of outreach activities.
- Grantee will provide 1 status report to the Long-Term Care Coordinating Council.

IX. Outcome Objectives

- 1) At least 70% of consumers credit the LTCCRA with providing valuable resources that enabled them to better access long-term care services.
- 2) At least 70% of consumers learned about new long-term care resources or services available to them.
- 3) At least 75% of peer advocates are satisfied with their ability to help consumers.

X. Reporting and Other Requirements

- 1) Grantee will provide various reports during the term of the grant agreement.
- 2) 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.
- 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.
- 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. At least 35% of contracted unduplicated consumers will complete the Consumer Satisfaction Survey.
- 7) The 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-1 & F-2.
- 8) Grantee shall enter into Getcare, SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.
- 9) 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
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.

	A	B	C	D	E	F
1	Appendix B3, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name					Term
6	Senior and Disability Action					7/1/18-6/30/20
7	(Check One) New Renewal ____ Modification <u> X </u>					
8	If modification, Effective Date of Mod. 7/1/2019 No. of Mod. #2					
9	Program: Long Term Care Consumer Rights Advocacy					
10	Budget Reference Page No.(s)	MODIFICATION		REVISED	NEW	REVISED
11	Program Term	7/1/18-6/30/19	7/1/18-6/30/19	7/1/18-6/30/19	7/1/18-6/30/20	TOTAL
12	Expenditures					
13	Salaries & Benefits	\$72,111	\$5,694	\$77,804	\$72,295	\$150,099
14	Operating Expense	\$31,003	\$1,851	\$32,854	\$30,819	\$63,673
15	Subtotal	\$103,114	\$7,545	\$110,658	\$103,114	\$213,772
16	Indirect Percentage (%)	15%		15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$15,467	\$1,131	\$16,599	\$15,467	\$32,066
18	Capital Expenditure	\$0		\$0	\$0	\$0
19	Total Expenditures	\$118,581	\$8,676	\$127,257	\$118,581	\$245,838
20	HSA Revenues					
21	General Fund	\$115,689		\$115,689	\$115,689	\$231,378
22	CODB	\$2,892		\$2,892	\$2,892	\$5,784
23	OTO - Capacity		\$8,676	\$8,676		\$8,676
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$118,581	\$8,676	\$127,257	\$118,581	\$245,838
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$118,581	\$8,676	\$127,257	\$118,581	\$245,838
37	Full Time Equivalent (FTE)					
39	Prepared by: Jessica Lehman			Telephone No.: 415-546-1333		
40	HSA-CO Review Signature: _____					
41	HSA #1					5/1/2019

	A	B	C	D	E	F	G	H	I	J	
1											
2											
3	Senior and Disability Action										
4	Program Name: Long Term Care Consumer Rights Advocacy										
5	(Same as Line 9 on HSA #1)										
6											
7	Salaries & Benefits Detail										
8											
9											
10						MODIFICATION	REVISED	NEW			
11						7/1/18-6/30/19	7/1/18-6/30/19	7/1/18-6/30/19	7/1/18-6/30/20		
12		Agency Totals		For HSA Program						TOTAL	
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary		Budgeted Salary		7/1/18-6/30/20	
13	Peer Advocate Program Coordinator	\$50,510	100%	98%	98%	\$48,292		\$48,292	\$48,500	\$96,792	
14	Executive Director	\$67,017	100%	11%	11%	\$7,177		\$7,177	\$7,112	\$14,289	
15	Development Staff	\$46,279	100%	75%	75%		\$3,580	\$3,580		\$3,580	
16	Admin Staff	\$1,032	32%	100%	32%		\$800	\$800		\$800	
17											
18											
19											
20											
21											
22											
23											
24											
25											
26											
27											
28											
29	TOTALS	\$117,527	3.32	2.84	2.16	\$55,470	\$4,380	\$59,849	\$55,612	\$115,461	
30											
31	FRINGE BENEFIT RATE	30%									
32	EMPLOYEE FRINGE BENEFITS	\$35,258				\$16,641	\$1,314	\$17,955	\$16,684	\$34,638	
33											
34											
35	TOTAL SALARIES & BENEFITS	\$152,785				\$72,111	\$5,694	\$77,804	\$72,295	\$150,099	
36	HSA #2									5/1/2019	

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													
31													
32													
33													
34													
35													
36													
37													

APPENDIX A4 – SCOPE OF SERVICES

**SENIOR AND DISABILITY ACTION
SENIOR AND DISABILITY EMPOWERMENT**

July 1, 2018 to June 30, 2020

Modification Effective: July 1, 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 older adult 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, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult 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.
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 that is determined to be functionally impaired because the individual: (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; and/or (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 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
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 older adults 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 older adults 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 older adults 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; <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>)

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 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 shall be published in advance of the sessions. Grantee will choose sites from various communities and neighborhoods in San Francisco to be as inclusive as possible from all sectors of the city. The staff is housed at the SDA headquarters at 1360 Mission St., 4th Floor, San Francisco, CA 94103, which is open during regular business hours

VI. Description of Services

The purpose of SDA’s empowerment programs is to educate and inform older adult 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 offered in several languages: Chinese, English, Russian and Spanish. 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, 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.

In conjunction with both empowerment programs, SDA convenes the Empowerment Advisory Council. This council has been around since the beginning of Senior Survival School. Its purpose is to steer the direction of the empowerment programs by providing feedback, suggesting class topics and locations and helping with outreach, set-up, and facilitation. The Council meets 6 times per year (once every other month). Members of the Council are community representatives, most of who have been involved with SDA and other related organizations for many years. These members bring years of experience and history to the Council. SDA is in the process of bringing in new Council members who want to be more involved.

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 number of students for Senior and Disability Survival School to achieve annual goal.

UNIT: one student

- 3) Grantee will schedule and conduct meetings of the 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 older adult and disabled community.
- 3) 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

- 4) At least **85%** of consumers completing an annual satisfaction survey will rate themselves as more aware of the community organizing process.
- 5) 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.
- 6) 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 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.
- 8) Grantee shall develop and deliver ad hoc reports as requested by DAAS and/or HSA.
- 9) 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.

	A	B	C	D	E	F
1	Appendix B4, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name					Term
6	Senior and Disability Action					7/1/18-6/30/20
7	(Check One) New Renewal ____ Modification <u> X </u>					
8	If modification, Effective Date of Mod. 7/1/2019 No. of Mod. #3					
9	Program: Senior and Disability Empowerment					
10	Budget Reference Page No.(s)		MODIFICATION	REVISED	NEW	REVISED
11	Program Term	7/1/18-6/30/19	7/1/18-6/30/19	7/1/18-6/30/20	7/1/19-6/30/20	TOTAL
12	Expenditures					
13	Salaries & Benefits	\$149,607	\$7,118	\$156,724	\$142,061	\$298,785
14	Operating Expense	\$41,020	\$16,170	\$57,190	\$33,618	\$90,808
15	Subtotal	\$190,627	\$23,288	\$213,914	\$175,679	\$389,593
16	Indirect Percentage (%)	15%		15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$26,085	\$4,994	\$31,080	\$26,351	\$57,431
18	Capital Expenditure	\$100	\$10,573	\$10,673	\$0	\$10,673
19	Total Expenditures	\$216,812	\$38,855	\$255,667	\$202,030	\$457,697
20	HSA Revenues					
21	General Fund	\$197,102		\$197,102	\$197,102	\$394,204
22	OTO - Capacity & Equipment	\$12,882	\$38,855	\$51,737		\$51,737
23	OTO - Disability Cultural Center	\$1,900		\$1,900		\$1,900
24	CODB	\$4,928		\$4,928	\$4,928	\$9,856
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$216,812	\$38,855	\$255,667	\$202,030	\$457,697
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$216,812	\$38,855	\$255,667	\$202,030	\$457,697
37	Full Time Equivalent (FTE)					
39	Prepared by: Jessica Lehman			Telephone No.: 415-546-1333		
40	HSA-CO Review Signature: _____					
41	HSA #1					5/1/2019

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													
31													
32													
33													
34													
35													
36													
37													

