



London Breed, Mayor

Department of Human Services  
Department of Aging and Adult Services

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 *ju*

**DATE:** MAY 1, 2019

**SUBJECT:** NEW GRANT: **SELF-HELP FOR THE ELDERLY (NON-PROFIT) FOR PROVISION OF EMERGENCY SHORT-TERM HOME CARE FOR OLDER ADULTS: PERSONAL CARE, CHORE AND HOMEMAKER SERVICES**

**GRANT TERM:** 7/1/19 – 6/30/21

**GRANT AMOUNT:**

	<u>New</u>	<u>Contingency</u>	<u>Total</u>
	\$214,522	\$21,452	\$235,974

(See table below for annual amounts)

**FUNDING SOURCE**

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$11,904	\$0	\$202,618	\$21,452	\$235,974
<b>PERCENTAGE:</b>	5.5%	0%	94.5%		100%

The Department of Aging and Adult Services (DAAS) requests authorization to enter into new grant agreement with Self Help for the Elderly for the period of July 1, 2019 to June 30, 2021, in an amount of \$214,522 plus a 10% contingency amount for a total amount not to exceed \$235,974. The purpose of this grant is to provide Emergency Short-Term Home Care for Older Adults - Chore, Homemaker, and Personal Care services - to those eligible individuals experiencing difficulty in their home with activities of daily living (ADL), when discharged from a hospital or institution and in need of services, and/or individuals in the process of applying for the state's In Home Supportive Services (IHSS) program.

Service	FY 19-20	FY 20-21	Total FY 19-21	10% Contingency	Total Grant Amount FY 19-21
Emergency short-term Chore Services	\$37,318	\$37,318	\$74,636	\$7,464	\$82,100
Emergency short-term Homemaker Services	\$37,318	\$37,318	\$74,636	\$7,463	\$82,099
Emergency short-term Personal Care Services	\$32,625	\$32,625	\$65,250	\$6,525	\$71,775
Total	\$107,261	\$107,261	\$214,522	\$21,452	\$235,974

### Background

Title IIIB of the Older Americans Act provides funding for a series of supportive services programs which includes the Chore, Homemaker, and Personal Care services. Title IIIB services are designed to address functional limitations in older adults with a goal of maintaining health and independence while living at home. Delivery of the Chore, Homemaker, and Personal Care services promotes older adults' ability to maintain the highest possible levels of function, participation and dignity in the community.

### Services to be Provided

Emergency Short-Term Home Care for Seniors consists of three distinct services: Chore, Homemaker, and Personal Care Services. The services are defined, by the California Department of Aging, as follows:

Chore Services	To provide periodic maintenance for a household such as heavy cleaning, washing windows, sidewalk maintenance and yard work.
Homemaker Services	To provide light routine maintenance of a household, including service support such as dusting, vacuuming, laundry, or meal preparation.
Personal Care Services	To assist the consumer with routine care of a personal nature, such as bathing, dressing, personal care, feeding and general hygiene

Grantee will administer all aspects of the program including intake and eligibility determination for clients, scheduling of services, and delivery of services in a professional and effective manner.

**Location and Time of Services**

Grantee services are based at 601 Jackson Street, San Francisco, CA 94133, during the hours of 8:30 a.m. to 5 p.m. Monday to Friday. Services are delivered at client homes throughout the City.

**Performance**

Self-Help for the Elderly was monitored in March 2019 and found to be in compliance with fiscal performance and monitoring requirements. The annual program monitoring session is scheduled for late May 2018 and the program has been in compliance so far this fiscal year.

**Selection**

Grantee was selected through RFP #838, which was competitively bid on February 8, 2019.

**Funding**

Funding for these grant agreements are provided by 94.5% Federal and 5.5% County funds.

**ATTACHMENT****Emergency Short-Term Home Care for Seniors-Chore Services**

Appendix A- Services to be Provided by Grantee

Appendix B- Calculation of Charges

**Emergency Short-Term Home Care for Seniors –Homemaker Services**

Appendix A1- Services to be Provided by Grantee

Appendix B1- Calculation of Charges

**Emergency Short-Term Home Care for Seniors -Personal Care Services**

Appendix A2- Services to be Provided by Grantee

Appendix B2- Calculation of Charges

**APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**

**Effective July 1, 2019 to June 30, 2021**

**SELF-HELP FOR THE ELDERLY**

**EMERGENCY SHORT-TERM HOME CARE FOR OLDER ADULTS:**

**CHORE SERVICES**

**I. Purpose**

The purpose of this grant is to provide emergency short-term Chore services to those eligible individuals experiencing difficulty in their home with activities of daily living (ADL's), when discharged from a hospital or institution, or individuals in the process of applying for the state's IHSS program. This service is designed to promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

**II. Definitions**

Adult with a Disability	Person 18-59 years of age living with a disability.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
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 determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Self-Help for the Elderly
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 100% 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
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent.
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in Grantee's program and reflected via enrollment in CA GetCare.

### III. Target Population

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

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

### IV. Eligibility for Chore Services

- 1) A resident of San Francisco *and*
- 2) Aged 60 and above

3) Consumers in need of emergency short-term Chore services

**V. Location and Time of Services**

Intake and program administration for Self-Help for the Elderly is located at 601 Jackson St. Program services will take place at client residences.

**VI. Description of Services**

The Grantee is to hire, train and place care workers to provide Chore services to eligible consumers. Chore services include assistance with heavy housework, yard work, sidewalk and other home maintenance.

**VII. Contractor Responsibilities**

On an annual basis, the Grantee will provide Chore services to the indicated number of consumers with the indicated number of units of service. Chore services should be designed to:

- Provide quality services that attain a high level of satisfaction from participants
- Provide services that meet the needs of the participants
- Provide assistance that ensures well-being and health
- Provide information and referral as needed

**VIII. Units of Service and Definitions**

On an annual basis, the Grantee will provide the following Chore services:

1) Unduplicated Consumers. Grantee will provide service to unduplicated consumers that consist of program participants.

UNIT: One unduplicated consumer.

2) Service Hours. Service hours are time spent providing direct services to program participants.

UNIT: One hour of service

**IX. Service Objectives**

On an annual basis:

- Grantee will serve 75 unduplicated consumers.
- Grantee will provide 520 units of chore service as described above.

**X. Outcome Objectives**

Grantee will administer an annual Consumer Satisfaction Survey, pre-approved by Office on the Aging staff, to consumers with a response rate of at least 50% of the annual unduplicated consumer service objective as specified in the Service Objective section below.

Satisfaction Survey Outcomes

- At least 85% of consumers surveyed will report that they are satisfied (or better) with the services provided.
- At least 85% of the consumers surveyed will report that they received the services that they need to remain at home.

Performance Outcomes

- At least 95% of consumers will receive services within a one hour window of the scheduled time.
- At least 85% of consumers will receive services within a 48 hour time period from initial intake.
- At least 75% of the consumers served by the program will need assistance in performing at least 2 ADLs\*. (\*To be determined by consumer information entered into the CA GetCare system.)

**XI. Reporting Requirements**

- A. Grantee will provide various reports during the term of the grant agreement:
- B. The Grantee will enter consumers' data into the CA GetCare database system.
- C. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5<sup>th</sup> working day of the month for the preceding month.
- D. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS and Contracts Department staff.
- E. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- F. Grantee will submit response rates and aggregated data from Annual Consumer Satisfaction survey to Office on the Aging staff by March 15<sup>th</sup> of each grant year.
- G. 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.
- H. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- I. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- J. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.

- K. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- L. Grantee will assure that services delivered are consistent with professional standards for this service.
- M. Pursuant to California Department of Aging Requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- N. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- O. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults connect to services throughout the City. These Focal Points are:

Designated Community Focal Points		
Name	Address	Phone
Western Addition Senior Center	1390 1/2 Turk St, San Francisco, 94115	415-921-7805
Bayview Senior Connections	5600 3rd St, San Francisco, 94124	415-647-5353
OMI Senior Center (CCYO)	65 Beverly St, San Francisco, 94132	415-335-5558
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121	415-404-2938
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131	415-550-2221
Openhouse	1800 Market St, San Francisco, 94102	415-347-8509
SF Senior Center (SFSC)	481 O'Farrell St, San Francisco, 94102	415-202-2983
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109	415-202-2983
South Sunset Senior Center (SHE)	2601 40th Ave, San Francisco, 94116	415-566-2845
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133	415-677-7585
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108	415-438-9804
Toolworks	25 Kearny St, San Francisco, 94108	415-733-0990
DAAS Benefits and Services Hub	2 Gough St, San Francisco, 94103	415-355-6700

- P. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Tahir Shaikh  
 Contracts Manager/HSA  
 P.O. Box 7988  
 San Francisco, CA 94120  
 tahir.shaikh@sfgov.org

Linda Murley  
 DAAS, Office on the Aging  
 P.O. Box 7988  
 San Francisco, CA 94120  
 linda.murley@sfgov.org

**XI. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and



outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.

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

	A	B	C	D
1	Appendix B, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	<b>Self-Help for the Elderly</b>		7/1/2019-6/30/2021	
7	(Check One)    New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	<b>Program: Emergency Short-Term Home Care: Chore</b>			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/19-6/30/21
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$31,746	\$31,746	\$63,492
14	Operating Expenses	\$704	\$704	\$1,408
15	<b>Subtotal</b>	<b>\$32,450</b>	<b>\$32,450</b>	<b>\$64,900</b>
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$4,868	\$4,868	\$9,736
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0
19	<b>Total Expenditures</b>	<b>\$37,318</b>	<b>\$37,318</b>	<b>\$74,636</b>
20	<b>HSA Revenues</b>			
21	General Fund	\$15,614	\$15,614	\$31,228
22	Federal	\$21,704	\$21,704	\$43,408
23				
24				
25				
26				
27				
28				
29	<b>TOTAL HSA REVENUES</b>	<b>\$37,318</b>	<b>\$37,318</b>	<b>\$74,636</b>
30				
31				
32				
33				
34				
35				
36	<b>Total Revenues</b>	<b>\$37,318</b>	<b>\$37,318</b>	<b>\$74,636</b>
37	Full Time Equivalent (FTE)			
39	Prepared by:    Leny Nair	Telephone No.:	415-677-7682	4/9/2019
40	HSA-CO Review Signature: _____			
41	HSA #1			6/20/2018

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	Self-Help for the Elderly							
4	Program: Emergency Short-Term Home Care: Chore							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11						7/1/19-6/30/20	7/1/20-6/30/21	7/1/2019-6/30/2021
		Agency Totals		HSA Program		DAAS	DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	Director of Social Services	\$86,500	1.00	2%	0.02	\$2,119	\$2,119	\$4,238
14	Senior Elder Care Worker	\$41,600	1.00	35%	0.35	\$14,560	\$14,560	\$29,120
15	Elder Care Worker-On-Call	\$35,360	0.30	10%	0.10	\$3,536	\$3,536	\$7,072
16	Program Assistant	\$39,520	1.00	12%	0.12	\$4,841	\$4,841	\$9,682
17								
18								
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28								
29								
30	TOTALS	\$202,980	3.30	60%	0.60	\$25,056	\$25,056	\$50,112
31								
32	FRINGE BENEFIT RATE	26.70%						
33	EMPLOYEE FRINGE BENEFITS	\$54,196				\$6,690	\$6,690	\$13,380
34								
35								
36	TOTAL SALARIES & BENEFITS	\$257,176				\$31,746	\$31,746	\$63,492
37	HSA #2							6/20/2018

	A	B	C	D	E	F	G	H	J	K
1	Appendix B, Page 3									
2										
3	<b>Self-Help for the Elderly</b>									
4	<b>Program: Emergency Short-Term Home Care: Chore</b>									
5										
6										
7	<b>Operating Expense Detail</b>									
8										
9										
10										
11										
12	<u>Expenditure Category</u>									<b>TOTAL</b>
										<u>7/1/2019-6/30/2021</u>
13	Rental of Property									
14	Utilities(Elec, Water, Gas, Phone, Garbage)									
15	Office Supplies, Postage				\$154		\$154			\$308
16	Building Maintenance Supplies and Repair									
17	Printing and Reproduction									
18	Insurance				\$150		\$150			\$300
19	Staff Training									
20	Staff Travel-(Local & Out of Town)				\$200		\$200			\$400
21	Rental of Equipment									
22										
23	<b>CONSULTANTS</b>									
24										
25										
26										
27	<b>OTHER</b>									
28	Personal Protective Supplies				\$200		\$200			\$400
29										
30										
31	<b>TOTAL OPERATING EXPENSE</b>				<b><u>\$704</u></b>		<b><u>\$704</u></b>			<b><u>\$1,408</u></b>
32										
33	<b>HSA #3</b>									<b>6/20/2018</b>

**APPENDIX A1 – SERVICES TO BE PROVIDED BY GRANTEE**  
**Effective July 1, 2019 to June 30, 2021**  
**SELF-HELP FOR THE ELDERLY**

**EMERGENCY SHORT-TERM HOMECARE FOR OLDER ADULTS:**  
**HOMEMAKER SERVICES**

**I. Purpose**

The purpose of this grant is to provide emergency short-term Homemaker services to those eligible individuals experiencing difficulty in their home with activities of daily living (ADL's), when discharged from a hospital or institution, or individuals in the process of applying for the state's IHSS program. This service is designed to promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

**II. Definitions**

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Grantee	Self-Help for the Elderly
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Low Income	Having income at or below 100% 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.
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Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in Grantee’s program and reflected via enrollment in CA GetCare.

**III. Target Population**

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

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

**IV. Eligibility for Homemaker Services**

- 1) A resident of San Francisco *and*
- 2) Aged 60 and above
- 3) Consumers in need of emergency short-term Homemaker services

**V. Location and Time of Services**

Intake and program administration for Self-Help for the Elderly is located at 601 Jackson St. Program services will take place at client residences.

**VI. Description of Services**

The Grantee is to hire, train and place care workers to provide Homemaker services to eligible consumers. Homemaker services include provision of assistance to persons having difficulties with one or more of the following instrumental activities of daily living (IDL’s): preparing meals,

shopping for personal and household items, managing money, using the telephone or doing light housework.

## VII. Contractor Responsibilities

On an annual basis, the Grantee will provide Homemaker service to the indicated number of consumers with the indicated number of units of service. Homemaker services should be designed to:

- Provide quality services that attain a high level of satisfaction from participants
- Provide services that meet the needs of the participants
- Provide assistance that ensures well-being and health
- Provide information and referral as needed

## VIII. Units of Service and Definitions

On an annual basis, the Grantee will provide the following Homecare services:

- 1) Unduplicated Consumers. Grantee will provide service to unduplicated consumers that consist of program participants.

UNIT: One unduplicated consumer.

- 2) Service Hours. Service hours shall include time spent providing direct services to program participants.

UNIT: One hour of service

## IX. Service Objectives

On an annual basis:

- Grantee will serve 75 Unduplicated Consumers.
- Grantee will provide 520 units of Homemaker Services as described above.

## X. Outcome Objectives

Grantee will administer an annual Consumer Satisfaction Survey, pre-approved by Office on the Aging staff, to consumers with a response rate of **at least 50%** of the annual unduplicated consumer service objective as specified in the Service Objective section below.

Satisfaction Survey Outcomes:

- At least eighty-five percent (85%) of consumers surveyed will report that they are satisfied (or better) with the services provided.
- At least eighty-five percent (85%) of the consumers surveyed will report that they received the services that they need to remain at home.

Performance Outcomes:

- At least 95% of consumers will receive services within a one hour window of their scheduled time.
- At least 85% of consumers will receive services within a 48 hour time period from initial intake.
- At least 75% of the consumers served by the program will need assistance in performing at least 2 ADLs\*. (\*To be determined via consumer information entered into the CA GetCare system.)

**X. Reporting Requirements**

- A. Grantee will provide various reports during the term of the grant agreement:
- B. The Grantee will enter consumers' data into the CA GetCare database system.
- C. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5<sup>th</sup> working day of the month for the preceding month.
- D. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS and Contracts Department staff.
- E. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- F. Grantee will submit response rates and aggregated data from Annual Consumer Satisfaction survey to Office on the Aging staff by March 15<sup>th</sup> of each grant year.
- G. 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.
- H. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- I. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- J. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- K. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- L. Grantee will assure that services delivered are consistent with professional standards for this service.
- M. Pursuant to California Department of Aging Requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- N. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- O. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults connect to services throughout the City. These Focal Points are:



Designated Community Focal Points		
Name	Address	Phone
Western Addition Senior Center	1390 1/2 Turk St, San Francisco, 94115	415-921-7805
Bayview Senior Connections	5600 3rd St, San Francisco, 94124	415-647-5353
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132	415-335-5558
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121	415-404-2938
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131	415-550-2221
Openhouse	1800 Market St, San Francisco, 94102	415-347-8509
SF Senior Center (SFSC)	481 O'Farrell St, San Francisco, 94102	415-202-2983
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109	415-202-2983
South Sunset Senior Center (SHE)	2601 40th Ave, San Francisco, 94116	415-566-2845
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133	415-677-7585
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108	415-438-9804
Toolworks	25 Kearny St, San Francisco, 94108	415-733-0990
DAAS Benefits and Services Hub	2 Gough St, San Francisco, 94103	415-355-6700

P. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Tahir Shaikh  
 Contracts Manager/HSA  
 P.O. Box 7988  
 San Francisco, CA 94120  
 Tahir.Shaikh@sfgov.org

Linda Murley  
 DAAS, Office on the Aging  
 P.O. Box 7988  
 San Francisco, CA 94120  
 linda.murley@sfgov.org

**XI. Monitoring Activities**

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

	A	B	C	D
1	Appendix B1, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	<b>Self-Help for the Elderly</b>		7/1/2019-6/30/2021	
7	(Check One)    New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	<b>Program: Emergency Short-Term Homemaker Services</b>			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/15-6/30/21
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$31,746	\$31,746	\$63,492
14	Operating Expenses	\$704	\$704	\$1,408
15	<b>Subtotal</b>	<b>\$32,450</b>	<b>\$32,450</b>	<b>\$64,900</b>
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$4,868	\$4,868	\$9,736
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0
19	<b>Total Expenditures</b>	<b>\$37,318</b>	<b>\$37,318</b>	<b>\$74,636</b>
20	<b>HSA Revenues</b>			
21	General Fund	\$16,071	\$16,071	\$32,142
22	Federal	\$21,247	\$21,247	\$42,494
23				
24				
25				
26				
27				
28				
29	<b>TOTAL HSA REVENUES</b>	<b>\$37,318</b>	<b>\$37,318</b>	<b>\$74,636</b>
30				
31				
32				
33				
34				
35				
36	<b>Total Revenues</b>	<b>\$37,318</b>	<b>\$37,318</b>	<b>\$74,636</b>
37	Full Time Equivalent (FTE)			
39	Prepared by:    Leny Nair	Telephone No.:	415-677-7682	4/9/2019
40	HSA-CO Review Signature: _____			
41	HSA #1			6/20/2018

	A	B	C	D	E	F	G	H
1	Appendix B1, Page 2							
2								
3	Self-Help for the Elderly							
4	Program: Emergency Short-Term Homemaker Services							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11		Agency Totals		HSA Program		7/1/19-6/30/20	7/1/20-6/30/21	7/1/2019-6/30/2021
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAAS  Budgeted Salary	DAAS  Budgeted Salary	TOTAL  Budgeted Salary
12	POSITION TITLE							
13	Director of Social Services	\$86,500	1.00	2%	0.02	\$2,119	\$2,119	\$4,238
14	Senior Elder Care Worker	\$41,600	1.00	35%	0.35	\$14,560	\$14,560	\$29,120
15	Elder Care Worker-On-Call	\$35,360	0.30	10%	0.10	\$3,536	\$3,536	\$7,072
16	Program Assistant	\$39,520	1.00	12%	0.12	\$4,841	\$4,841	\$9,682
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS	\$202,980	3.30	60%	0.60	\$25,056	\$25,056	\$50,112
31								
32	FRINGE BENEFIT RATE	26.70%						
33	EMPLOYEE FRINGE BENEFITS	\$54,196				\$6,690	\$6,690	\$13,380
34								
35								
36	TOTAL SALARIES & BENEFITS	\$257,176				\$31,746	\$31,746	\$63,492
37	HSA #2	6/20/2018						

	A	B	C	D	E	F	G	H	I	J	K
1	Appendix B1, Page 3										
2											
3	<b>Self-Help for the Elderly</b>										
4	<b>Program: Emergency Short-Term Homemaker Services</b>										
5											
6											
7	<b>Operating Expense Detail</b>										
8											
9											
10											
11											
12	<u>Expenditure Category</u>				TERM	<u>7/1/19-6/30/20</u>	<u>7/1/20-6/30/21</u>				TOTAL <u>7/1/2019-6/30/202</u>
13	Rental of Property										
14	Utilities(Elec, Water, Gas, Phone, Garbage)										
15	Office Supplies, Postage					\$154	\$154				\$308
16	Building Maintenance Supplies and Repair										
17	Printing and Reproduction										
18	Insurance					\$150	\$150				\$300
19	Staff Training										
20	Staff Travel-(Local & Out of Town)					\$200	\$200				\$400
21	Rental of Equipment										
22											
23	<b>CONSULTANTS</b>										
24											
25											
26											
27	<b>OTHER</b>										
28	Personal Protective Supplies					\$200	\$200				\$400
29											
30											
31	<b>TOTAL OPERATING EXPENSE</b>					<b>\$704</b>	<b>\$704</b>				<b>\$1,408</b>
32											
33	<b>HSA #3</b>										<b>6/20/2018</b>

**APPENDIX A2 – SERVICES TO BE PROVIDED BY GRANTEE  
Effective July 1, 2019 to June 30, 2021  
SELF-HELP FOR THE ELDERLY**

**EMERGENCY SHORT TERM HOME CARE FOR OLDER ADULTS:  
PERSONAL CARE SERVICES**

**I. Purpose**

The purpose of this grant is to provide emergency short-term Personal Care services to those eligible individuals experiencing difficulty in their home with activities of daily living (ADL's), when discharged from a hospital or institution, or individuals in the process of applying for the state's IHSS program. This service is designed to promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

**II. Definitions**

Adult with a Disability	Person 18-59 years of age living with a disability.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
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 determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Self-Help for the Elderly
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 100% 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
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent.
Senior	Person who is 60 years or older, used interchangeably with older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in Grantee's program and reflected via enrollment in CA GetCare.

### III. Target Population

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

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

### IV. Eligibility for Personal Care Services

- 1) A resident of San Francisco *and*
- 2) Aged 60 and above
- 3) Consumers in need of emergency short-term Personal Care services

**V. Location and Time of Services**

Intake and program administration for Self-Help for the Elderly is located at 601 Jackson St. Program services will take place at client residences.

**VI. Description of Services**

The Grantee is to hire, train, and place care workers to provide Personal Care service to the eligible consumers. Personal Care services include provision of personal assistance, stand-by assistance, supervision or cues, such as with eating, bathing, toileting, transferring in/out of bed/chair, walking, dressing, grooming.

**VII. Contractor Responsibilities**

On an annual basis, the Grantee will provide Personal Care service to the indicated number of consumers with the indicated number of units of service. Personal Care services should be designed to:

- Provide quality services that attain a high level of satisfaction from participants
- Provide services that meet the needs of the participants
- Provide assistance that ensures well-being and health
- Provide information and referral as needed

**VIII. Units of Service and Definitions**

On an annual basis, the Grantee will provide the following Personal Care services:

- 1) Unduplicated Consumers. Grantee will provide service to unduplicated consumers that consist of program participants.

UNIT: One unduplicated consumer.

- 2) Service Hours. Service hours shall include time spent providing direct services to program participants.

UNIT: One hour of service

**VIII. Service Objectives**

On an annual basis:

- Grantee will serve **65** unduplicated consumers.
- Grantee will provide **460** units of Personal Care services as described above.

**IX. Outcome Objectives**

Grantee will administer an annual Consumer Satisfaction Survey, pre-approved by Office on the Aging staff, to consumers with a response rate of **at least 50%** of the annual unduplicated consumer service objective as specified in the Service Objective section below.

### Satisfaction Survey Outcomes

- At least 85% of consumers surveyed will report that they are satisfied (or better) with the services provided.
- At least 85% of the consumers surveyed will report that they received the services that they need to remain at home.

### Performance Outcomes

- At least 95% of consumers will receive services within a one hour window of their scheduled time.
- At least 85% of consumers will receive services within a 48 hour time period from initial intake.
- At least 75% of the consumers served by the program will need assistance in performing at least 2 ADLs\*. (\*To be determined via consumer information entered into the CA GetCare system.)

## **X. Reporting Requirements**

- A. Grantee will provide various reports during the term of the grant agreement:
- B. The Grantee will enter consumers' data into the CA GetCare database system.
- C. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5<sup>th</sup> working day of the month for the preceding month.
- D. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS and Contracts Department staff.
- E. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
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- I. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10<sup>th</sup>.
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Toolworks	25 Kearny St, San Francisco, 94108	415-733-0990
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 Tahir.Shaikh@sfgov.org

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 DAAS, Office on the Aging  
 P.O. Box 7988  
 San Francisco, CA 94120  
 Linda.Murley@sfgov.org

## **XI. Monitoring Activities**

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

	A	B	C	D
1	Appendix B2, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	<b>Self-Help for the Elderly</b>		7/1/2019-6/30/2021	
7	(Check One)    New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	<b>Program: Emergency Short-Term Home Care: Personal Care</b>			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/19-6/30/20	7/1/20-6/30/21	7/1/19-6/30/21
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$27,851	\$27,851	\$55,702
14	Operating Expenses	\$518	\$518	\$1,036
15	<b>Subtotal</b>	<b>\$28,369</b>	<b>\$28,369</b>	<b>\$56,738</b>
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$4,256	\$4,256	\$8,512
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$32,625	\$32,625	\$65,250
20	<b>HSA Revenues</b>			
21	General Fund	\$14,810	\$14,810	\$29,620
22	Federal	\$17,815	\$17,815	\$35,630
23				
24				
25				
26				
27				
28				
29	<b>TOTAL HSA REVENUES</b>	<b>\$32,625</b>	<b>\$32,625</b>	<b>\$65,250</b>
30				
31				
32				
33				
34				
35				
36	Total Revenues	\$32,625	\$32,625	\$65,250
37	Full Time Equivalent (FTE)			
39	Prepared by:    Leny Nair	Telephone No.:	415-677-7682	4/9/2019
40	HSA-CO Review Signature: _____			
41	HSA #1			6/20/2018

	A	B	C	D	E	F	G	H
1	Appendix B2, Page 2							
2								
3	Self-Help for the Elderly							
4	Program: Emergency Short-Term Home Care: Personal Care							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11		7/1/19-6/30/20		7/1/20-6/30/21		7/1/2019-6/30/2021		
		Agency Totals		HSA Program		DAAS	DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	Director of Social Services	\$86,500	1.00	2%	0.02	\$1,817	\$1,817	\$3,634
14	Senior Elder Care Worker	\$41,600	1.00	30%	0.30	\$12,480	\$12,480	\$24,960
15	Elder Care Worker-On-Call	\$35,360	0.30	10%	0.10	\$3,536	\$3,536	\$7,072
16	Program Assistant	\$39,520	1.00	11%	0.11	\$4,150	\$4,150	\$8,300
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS	\$202,980	3.30	53%	0.53	\$21,983	\$21,983	\$43,966
31								
32	FRINGE BENEFIT RATE	26.69%						
33	EMPLOYEE FRINGE BENEFITS	\$54,175				\$5,868	\$5,868	\$11,736
34								
35								
36	TOTAL SALARIES & BENEFITS	\$257,155				\$27,851	\$27,851	\$55,702
37	HSA #2	6/20/2018						

	A	B	C	D	E	F	G	H	I	J	K
1	Appendix B2, Page 3										
2											
3	<b>Self-Help for the Elderly</b>										
4	<b>Program: Emergency Short-Term Home Care: Personal Care</b>										
5											
6											
7	<b>Operating Expense Detail</b>										
8											
9											
10											
11											
12	<u>Expenditure Category</u>				TERM	<u>7/1/19-6/30/20</u>	<u>7/1/20-6/30/21</u>				TOTAL <u>7/1/2019-6/30/202</u>
13	Rental of Property										
14	Utilities(Elec, Water, Gas, Phone, Garbage)										
15	Office Supplies, Postage					\$100	\$100				\$200
16	Building Maintenance Supplies and Repair										
17	Printing and Reproduction										
18	Insurance					\$125	\$125				\$250
19	Staff Training										
20	Staff Travel-(Local & Out of Town)					\$143	\$143				\$286
21	Rental of Equipment										
22											
23	<b>CONSULTANTS</b>										
24											
25											
26											
27	<b>OTHER</b>										
28	Personal Protective Supplies					\$150	\$150				\$300
29											
30											
31	<b>TOTAL OPERATING EXPENSE</b>					<b>\$518</b>	<b>\$518</b>				\$1,036
32											
33	<b>HSA #3</b>										<b>6/20/2018</b>