



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DATE: JUNE 5, 2024

SUBJECT: NEW GRANTS: SENIOR AND DISABILTY ACTION (NON-PROFIT) FOR THE PROVISION OF SENIOR AND DISABILITY EMPOWERMENT, HOME CARE ADVOCACY, HOUSING ADVOCACY AND COUNSELING, AND FOR LONG-TERM CARE CONSUMER RIGHTS ADVOCACY (see table on page 2)

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GRANT TERM: 7/1/2024-6/30/2028

GRANT AMOUNT:

	<u>New</u>	<u>Contingency</u>	<u>Total</u>
	\$3,168,973	\$316,897	\$3,485,870



London Breed
Mayor

Trent Rhorer
Executive Director

ANNUAL AMOUNT

	<u>FY 24/25</u>	<u>FY 25/26</u>	<u>FY 26/27</u>	<u>FY 27/28</u>
	\$763,201	\$786,097	\$801,819	\$817,856

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
Funding Source					
FUNDING:	\$3,168,973			\$316,897	\$3,485,870
PERCENTAGE:	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into grants with Senior and Disability Action 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 period of July 1, 2024 to June 30, 2028, in an amount of \$3,168,973, plus a 10% contingency for a total amount not to exceed \$3,485,870. The purpose of the grants is for 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, CBOs and policy makers. The funding amounts are detailed in the following table:

Senior and Disability Action							
Grant Program	FY24/25	FY25/26	FY26/27	FY27/28	Total	10% Contingency	Not To Exceed
Home Care Advocacy	\$140,737	\$144,959	\$147,858	\$150,816	\$584,370	\$58,437	\$642,807
Housing Advocacy & Counseling	\$205,585	\$211,752	\$215,988	\$220,307	\$853,632	\$85,363	\$938,995
Long-Term Care Consumer Rights Advocacy	\$158,231	\$162,978	\$166,237	\$169,562	\$657,007	\$65,701	\$722,709
Senior and Disability Empowerment	\$258,648	\$266,408	\$271,736	\$277,171	\$1,073,963	\$107,396	\$1,181,359
Total	\$763,201	\$786,097	\$801,819	\$817,856	\$3,168,973	\$316,897	\$3,485,870

Background

In October of 2010 DAS conducted a Consumer Advocacy needs assessment to identify programs that best support seniors and adults with disabilities understand and advocate for their own rights and services. The needs assessment was updated in 2015 and listening sessions with community stakeholders have occurred in the interim that confirm earlier assessments. Four stratagems were identified as being most able to positively impact the well-being of seniors and adults with disabilities: 1) Home Care Advocacy, 2) Housing Advocacy and Counseling, 4) Long-Term Care Consumer Rights Advocacy, 4) Senior and Disability Empowerment.

The Homecare Advocacy program has been coordinating a community collaboration of consumers and providers to advocate for additional resources for In-Home Supportive Services (IHSS). IHSS is an essential program that directly aids seniors and adults with disabilities to remain at home and prevent institutionalization.

Due to the vital nature of housing issues, Housing Advocacy and Counseling aims to strategically improve the housing situation for seniors and adults with disabilities and has been providing housing advocacy, education and outreach activities, housing counseling, and single room occupancy hotel advocacy.

The Long-Term Care Consumer Rights Advocacy Program is a valuable resource, assisting individuals to understand their long-term care consumer rights and access appropriate support in the areas of dispute resolution, hearings, and other grievances.

Older Adults and Adults with Disability Empowerment trains participants in the political process to advocate more broadly for the needs of their communities and teaching the skills necessary to be effective in organizing groups for action.

Through this suite of Advocacy and Empowerment programs, seniors and adults with disabilities acquire the knowledge and leadership skills to advocate for their rights, services, and create change to build a healthier, safer, and more independent San Francisco.

Services to be Provided

Home Care Advocacy

The Home Care Advocacy program works with consumers, community groups and policy-makers to guarantee older adults and adults with disabilities receive the in-home care essential to living independently in the community. Home care advocacy convenes two interrelated groups: 1) Healthcare Action Team (HAT) and 2) the In-Home Care Stakeholder Workgroup. 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 In-Home Care Stakeholder Workgroup knows the importance of policy-makers remaining connected to those directly affected by the In-Home Supportive Services (IHSS) program. The In-Home Care Stakeholder Workgroup 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 seniors and adults with disabilities in need of housing, tenant's rights, and Single Room Occupancy hotel (SRO) intercessions. This is accomplished, in part, through counseling services provided in conjunction with the Housing Rights Committee of San Francisco. Housing advocacy efforts include outreach and education, and coalition building. It also includes participation in public hearings and community forums that advocate for affordable housing, tenant and SRO resident rights. Meetings to specifically advocate for SRO residents are held with the goal of promoting improved living conditions and services for the senior and disabled residents of SRO buildings throughout San Francisco.

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 options in San Francisco. LTCCRA facilitates group trainings, and drop-in clinics at community hubs and resource fairs. Through a multi-lingual call center LTCCRA provides consolidated assistance to consumers. The call center is staffed by trained peer advocates and functions as an advice line by providing referrals, assistance and follow-up services. LTCCRA has developed ongoing training and retention practices to establish a core of peer advocates that provide direct one-to-one support and counseling on long-term care issues and referrals when appropriate.

Senior and Disability Empowerment

Senior and Disability Empowerment includes two skills training modules: the Senior and Disability Survival School and the Senior and Disability University. Senior and Disability Survival School educates older adults and people with disabilities on the supportive services available to them, and how to access those services. Senior and Disability University provides leadership training to enable consumers to advocate for their communities and themselves. The Senior and Disability Empowerment program instructors take their curriculum into the community, with focus on the City's most underserved neighborhoods. Sessions are held at community centers, public libraries and housing complexes and are publicized beforehand in conjunction with community partners. Classes

can be translated into several languages, are free of cost, and offered in neighborhood hubs throughout San Francisco.

Selection

Grantee was selected through RFP 1124 Advocacy and Empowerment, which was competitively bid in March 2024.

Funding

Funding for these services will be provided through County General Funds.

ATTACHMENTS

<u>Home Care Advocacy</u> Appendix A1 – Scope of Services to be provided Appendix B1 – Budget	<u>Housing Advocacy and Counseling</u> Appendix A2 – Scope of Services to be provided Appendix B2 – Budget
<u>Long-Term Care Consumer Rights Advocacy</u> Appendix A3 – Scope of Services to be provided Appendix B3 – Budget	<u>Senior and Disability Empowerment</u> Appendix A4 – Scope of Services to be provided Appendix B4 – Budget

APPENDIX A-1, SCOPE OF SERVICES

SENIOR AND DISABILITY ACTION HOME CARE ADVOCACY July 1, 2024 to June 30, 2028

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.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Grantee	Senior and Disability Action (SDA)
HSA	Human Services Agency of the City and County of San Francisco

HAT	Healthcare Action Team
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.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language.
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.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
OCP	Office of Community Partnerships
Senior	Person who is 60 years or older, used interchangeably with older adult
Service Unit	The minimum units of services to be provided through this funding.
SF DAS 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.
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>)
Socially Isolated	Having few social relationships and few people to interact with regularly.
Unduplicated Consumer (UDC)	A unique consumer receiving services in Grantee's programs and reflected via enrollment in SF DAS GetCare.

III. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low-income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency

- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult aged 60 years or older *or*
- An adult with a disability, aged 18-59 *and*
- A resident of the City and county of San Francisco

V. Location and Time of Services

Home Care Advocacy services are provided at Senior and Disability Action, located at 222 8th St, San Francisco, CA 94103. The office hours of operation are 10:00am to 2:00pm, Monday through Friday. In addition to office hours, Home Care Advocacy services are provided at other settings around the City, over phone and virtually, 9:00am-5:00pm, Monday-Friday.

VI. Services to be Provided

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 Care Stakeholder Workgroup.

HAT is a consumer advocacy group that works to empower older adults & adults with disabilities. HAT works directly with consumers to gather their experiences and stories, build leadership, and take 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.

The In-Home Care Stakeholder Workgroup emphasizes the importance of policy makers connecting to those directly affected by the IHSS program. This workgroup brings together leaders of government agencies, non-profit organizations, and labor representatives with IHSS consumers and providers to facilitate listening, understanding and open communication.

Through the Home Care Advocacy program the Grantee will:

1. Convene In-Home Care Stakeholder Workgroup and HAT meetings to address planning and action for home care advocacy. (UNIT: one meeting)
2. Form strategic committees, groups and alliances to work as advocates to improve the IHSS delivery system. (UNIT: one committee, group, or alliance)

3. Provide presentation and outreach activities to educate the public, involve older adults and adults with disabilities in home care advocacy. (UNIT: one presentation)
4. 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)
5. Develop and create multi-media exposures: news articles, TV or radio talk show appearances, computer exposure, or other creative marketing techniques. (Unit: one exposure)

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26	FY 26/27	FY 27/28
In-Home Care Stakeholder Workgroup meetings	11	11	11	11
HAT meetings	11	11	11	11
Strategic committees, groups and alliances	6	6	6	6
Community presentations	16	16	16	16
Contacts in development of Home Care Advocacy relationships	24	24	24	24
Multi-media exposures	10	10	10	10

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- At least 85% of participants in the In-Home Care Stakeholder Workgroup feel engaged with the operation and accomplishments of the Workgroup.
- At least 85% of participants in the HAT feel engaged with the operation and accomplishments of the group.

IX. Reporting and Other Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.

- B.** Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** 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.
- G.** 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:

Sara Hofverberg
Program Analyst
Department of Disability and
Aging Services
Sara.Hofverberg@SFgov.org

Krystal Rogers
Contract Manager
Human Services Agency
Krystal.Rogers@SFgov.org

X. Monitoring Activities

- A.** Program Monitoring: Program monitoring will include review of compliance 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 SF DAS 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B.** Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices,

cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name	Senior and Disability Action				Term
7/1/24 - 6/30/28					
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: Home Care Advocacy & Housing Counseling					
Budget Reference Page No.(s)					(Total)
Program Term	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
DAS Expenditures					
Salaries & Benefits	\$115,816	\$115,816	\$115,816	\$115,816	\$463,264
Operating Expenses	\$6,564	\$10,235	\$12,756	\$15,328	\$44,883
Subtotal	\$122,380	\$126,051	\$128,572	\$131,144	\$508,147
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	
Indirect Cost	\$18,357	\$18,908	\$19,286	\$19,672	\$76,223
Total DAS Expenditures	\$140,737	\$144,959	\$147,858	\$150,816	\$584,370
Total DAS Revenue	\$140,737	\$144,959	\$147,858	\$150,816	\$584,370
Non DAS Revenues					
The Leaders Trust	\$75,348	\$75,348	\$75,348	\$75,348	\$301,392
Volunteer/Members	\$15,250	\$15,250	\$15,250	\$15,250	\$61,000
Total Non DAS Revenue	\$90,598	\$90,598	\$90,598	\$90,598	\$362,392
TOTAL DAS AND NON DAS REVENUE	\$231,335	\$235,557	\$238,456	\$241,414	\$946,762
Full Time Equivalent (FTE)	1.65	1.65	1.65	1.65	6.60
Prepared by:					Date: 05/21/24
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)

DAS Salaries & Benefits	Agency Totals		HSA Program		7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Executive Director	\$135,000	5%	100%	0.05	\$6,750	\$6,750	\$6,750	\$6,750	\$27,000
Home Care Advocacy Director	\$90,000	100%	44%	0.44	\$39,600	\$39,600	\$39,600	\$39,600	\$158,400
Attendant Employer Organizer	\$71,610	50%	100%	0.50	\$35,805	\$35,805	\$35,805	\$35,805	\$143,220
Digital Outreach Specialist	\$71,610	10%	100%	0.10	\$7,161	\$7,161	\$7,161	\$7,161	\$28,644
Totals	\$368,220	1.65	344.00%	1.09	\$89,316	\$89,316	\$89,316	\$89,316	\$357,264
Fringe Benefits Rate	30.00%								
Employee Fringe Benefits	\$110,466				\$26,500	\$26,500	\$26,500	\$26,500	\$106,000
Total DAS Salaries and Benefits	\$478,686				\$115,816	\$115,816	\$115,816	\$115,816	\$463,264

HSA #2

Operating Expense Detail

	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	(Total) 7/1/24 - 6/30/28
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Licenses and Fees					
Staff Training					
Staff Travel					
Rental of Equipment					
<u>Consultants/Subcontractors</u>					
Interpretation	\$6,564	\$10,235	\$12,756	\$15,328	\$44,883
Consultant B					
Consultant C					
<u>Other</u>					
Total DAS Operating Expenses	\$6,564	\$10,235	\$12,756	\$15,328	\$44,883

HSA #3

APPENDIX A-2, SCOPE OF SERVICES

SENIOR AND DISABILITY ACTION HOUSING ADVOCACY AND COUNSELING

July 1, 2024 to June 30, 2028

I. Purpose

The purpose of this grant is to empower older adults and adults with disabilities in the areas of housing and tenant rights and Single Room Occupancy hotel (“SRO”) advocacy. This empowerment is accomplished 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.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment

Grantee	Senior and Disability Action (SDA)
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.
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.
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.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language.
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.
Older Adult	Person who is 60 years or older, used interchangeably with senior
OCP	Office of Community Partnerships
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>)
Socially Isolated	Having few social relationships and few people to interact with regularly.
SRO	Single room occupancy hotel
SRO Collaborative	Organizations funded by Department of Building Inspection to help organize tenants within the SROs.

Unduplicated Consumer (UDC)	A unique consumer receiving services in Grantee's programs and reflected via enrollment in SF DAS GetCare.
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III. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Personnas who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Client Eligibility

To be eligible for services, clients must be:

- An older adult aged 60 years or older *or*
- An adult with a disability, aged 18-59 *and*
- A resident of the City and county of San Francisco

V. Location and Time of Services

Housing Advocacy and Counseling services are provided at Senior and Disability Action, located at 222 8th St, San Francisco, CA 94103. The office hours of operation are 10:00am to 2:00pm, Monday through Friday. In addition to office hours, Housing Advocacy and Counseling services are provided at other settings around the City, over phone and virtually, 9:00am-5:00pm, Monday-Friday.

VI. Services to be Provided

The Housing Advocacy and Counseling program supports older adults and adults with disabilities with housing, tenant's rights, and Single Room Occupancy hotel (SRO) matters. This is accomplished through a combination of outreach and education, counseling and advocacy.

The outreach and education component includes the preparation and distribution of information to apprise older adults and adults with disabilities of housing rights and available options, and to empower older adults and adults with disabilities to advocate for improved housing.

Housing counseling is provided to consumers to prevent eviction by providing information about tenants’ rights.

Housing advocacy efforts provide support for affordable and accessible housing for older adults and adults with disabilities. Much of the work is in coalition with other service providers or community groups including participation in public hearings, community forums, and group meetings that advocate for affordable housing, tenant and SRO resident rights.

SRO advocacy helps promote supportive services, housing stability, and improved living conditions for older adults and adults with disabilities who reside in SROs. This includes convening meetings to advocate for supportive services, housing stability, and improved living conditions in SROs.

Through the Housing Advocacy and Counseling program the Grantee will:

1. Provide counseling assistance to individuals regarding tenants’ rights and eviction prevention issues. (UNIT: one consumer)
2. Participate in and facilitate meetings to advocate for housing options and improved living conditions for older adults and adults with disabilities, and access to supportive services and housing stability for SRO residents. (UNIT: one public hearing, meeting, demonstration, information sharing event, or other public gathering)
3. Convene an SRO Senior and Disability Workgroup which will include SRO residents, the SRO Collaborative, the Department of Building Inspection, the Mayor’s Office on Disability, and/or 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)
4. Hold meetings of the Housing Collaborative, bringing together partner agencies with older adults and adults with disabilities, to advocate for tenant rights and affordable housing. (UNIT: one meeting of the Housing Collaborative)
5. Involve older adults and adults with disabilities in housing and SRO advocacy efforts. (UNIT: one volunteer)
6. Provide outreach to older adult and disability communities. (UNIT: one consumer)

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26	FY 26/27	FY 27/28
Counseling assistance to consumers	250	250	250	250
Participation in or facilitation of public hearings, public events or meetings	96	96	96	96
Convene SRO Senior and Disability Workgroup meetings	5	5	5	5

Convene meetings of the Housing Collaborative	10	10	10	10
Involve volunteers in housing and SRO advocacy efforts	50	50	50	50
Provide outreach to consumers	50	50	50	50

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- 1) At least 85% of consumers will state that the program provided accurate and current tenants rights information to help them with their housing issue.
- 2) At least 75% of participants in the Housing Collaborative and SRO Work Group will take part 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 towards improving living conditions in SROs.

IX. Reporting and Other Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- F. 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.
- G. 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:

Sara Hofverberg
Program Analyst
Department of Disability and
Aging Services
Sara.Hofverberg@SFgov.org

Krystal Rogers
Contract Manager
Human Services Agency
Krystal.Rogers@SFgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 SF DAS 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name	Senior and Disability Action				Term
					7/1/24 - 6/30/28
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: Housing Advocacy and Counseling					
Budget Reference Page No.(s)					(Total)
Program Term	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
DAS Expenditures					
Salaries & Benefits	\$126,063	\$126,063	\$126,063	\$126,063	\$504,252
Operating Expenses	\$52,707	\$58,069	\$61,752	\$65,508	\$238,036
Subtotal	\$178,770	\$184,132	\$187,815	\$191,571	\$742,288
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$26,815	\$27,620	\$28,173	\$28,736	\$111,344
Total DAS Expenditures	\$205,585	\$211,752	\$215,988	\$220,307	\$853,632
Total DAS Revenue	\$205,585	\$211,752	\$215,988	\$220,307	\$853,632
Non DAS Revenues					
Disability Inclusion Fund / Borealis Philanthropies	\$35,000	\$35,000	\$35,000	\$35,000	\$140,000
Menorah Park / San Francisco Foundation	\$39,257	\$39,257	\$39,257	\$39,257	\$157,028
Volunteers/Members	\$15,264	\$15,264	\$15,264	\$15,264	\$61,056
Total Non DAS Revenue	\$89,521	\$89,521	\$89,521	\$89,521	\$358,084
TOTAL DAS AND NON DAS REVENUE	\$295,106	\$301,273	\$305,509	\$309,828	\$1,211,716
Full Time Equivalent (FTE)	2.45	2.45	2.45	2.45	9.80
Prepared by:					Date:5/21/24
HSA-CO Review Signature:					
HSA #1					

Operating Expense Detail

	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	(Total) 7/1/24 - 6/30/28
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Licenses and Fees					
Staff Training					
Staff Travel					
Rental of Equipment					
<u>Consultants/Subcontractors</u>					
Consultants - Interpretation, Coaching	\$9,207	\$14,569	\$18,252	\$22,008	\$64,036
SF Housing Rights Committee	\$43,500	\$43,500	\$43,500	\$43,500	\$174,000
<u>Other</u>					
Total DAS Operating Expenses	\$52,707	\$58,069	\$61,752	\$65,508	\$238,036

HSA #3

APPENDIX A-3, SCOPE OF SERVICES**SENIOR AND DISABILITY ACTION
LONG-TERM CARE CONSUMER RIGHTS ADVOCACY
(LTCCRA)****July 1, 2024 to June 30, 2028****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 a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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.

Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language.
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.
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.
Older Adult	Person who is 60 years or older, used interchangeably with senior
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Outreach And Education	Preparation and distribution of materials that inform and advise older adults and adults with disabilities.
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
Service Unit	The minimum units of services to be provided through this funding.
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).
Socially Isolated	Having few social relationships and few people to interact with regularly.
Unduplicated Consumer (UDC)	A unique consumer receiving services in Grantee's programs and reflected via enrollment in SF DAS GetCare.

III. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low-income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Long-Term Care Consumer Rights Advocacy (LTCCRA)

To be eligible for LTCCRA services, clients must be:

- An older adult aged 60 years or older *or*

- An adult with a disability, aged 18-59 *and*
- A resident of the City and county of San Francisco

V. Location and Time of Services

Long-Term Care Consumer Rights Advocacy services are provided at Senior and Disability Action, located at 222 8th St, San Francisco, CA 94103. Drop-in hours of operation are Tuesday-Thursday 9:30am to 1:00pm or by appointment. Call center hours are Tuesdays 9:00am-4:00pm, Wednesdays 9:00am-1:00pm, and Thursdays 10:00am-1:00pm. In addition to drop-in and call center hours, Long-Term Care Consumer Rights Advocacy services are conducted at other settings around the City, providing outreach, presentations, and one-on-one support.

VI. Services to be Provided

The LTCCRA program provides information and training to individuals, family members, caregivers, and agencies on 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.

Through the Long –Term Care Consumer Rights Advocacy program the Grantee will:

1. Provide training for consumers and providers on the basic rights and services made available through programs offering long-term care services in San Francisco. (UNIT: One unduplicated consumer (can be consumer or provider))
2. Provide outreach and information sharing including: development of informational materials, discussion sessions, drop-in clinics at community centers, and resource fairs. (UNIT: once outreach activity)
3. Provide centralized information and assistance by creating a multi-lingual, consumer-directed call center that is a central advice line, providing problem solving information on long-term care services available, assistance and advocacy in linking individuals to services, and follow-ups with consumers to determine the outcome the assistance and advocacy. (UNIT: one consumer contact)
4. Develop and retain a group of peer advocates to provide direct one-to-one support and counseling on long-term care and related issues. (UNIT: one peer advocate)
5. Compile data on consumer contacts and issues that arise and report regularly to the DAS program analyst. (UNIT: one report given to DAS program analyst)

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26	FY 26/27	FY 27/28
Provide training to unduplicated consumers	250	250	250	250
Conduct outreach activities	48	48	48	48
Call center contacts	50	50	50	50
Develop peer advocates	6	6	6	6
Provide status report to DAS program analyst	1	1	1	1

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- 1) At least **70%** of consumers credit LTCCRA with providing valuable resources that enable 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 more satisfied with their ability to help consumers.

IX. Reporting and Other Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. 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.
- G. 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:

Sara Hofverberg
Program Analyst
Department of Disability and
Aging Services
Sara.Hofverberg@SFgov.org

Krystal Rogers
Contract Manager
Human Services Agency
Krystal.Rogers@SFgov.org

X. Monitoring Activities

- A. **Program Monitoring:** Program monitoring will include review of compliance 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 SF DAS 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name	Senior and Disability Action				Term 7/1/24 - 6/30/28
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: Long-Term Care Consumer Rights Advocacy					
Budget Reference Page No.(s)					(Total)
Program Term	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
DAS Expenditures					
Salaries & Benefits	\$93,084	\$93,084	\$93,084	\$93,084	\$372,336
Operating Expenses	\$44,508	\$48,636	\$51,470	\$54,361	\$198,975
Subtotal	\$137,592	\$141,720	\$144,554	\$147,445	\$571,311
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%	
Indirect Cost	\$20,639	\$21,258	\$21,683	\$22,117	\$85,697
Total DAS Expenditures	\$158,231	\$162,978	\$166,237	\$169,562	\$657,007
Total DAS Revenue	\$158,231	\$162,978	\$166,237	\$169,562	\$657,007
Non DAS Revenues					
Metta Fund	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
University Mound Ladies Home	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
San Francisco Foundation	\$37,500	\$37,500	\$37,500	\$37,500	\$150,000
Membership Dues	\$2,500	\$2,500	\$2,500	\$2,500	\$10,000
Individual and Corporate Giving	\$19,988	\$19,988	\$19,988	\$19,988	\$79,952
Fundraising Event	\$19,988	\$19,988	\$19,988	\$19,988	\$79,952
Interest on Investments	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Volunteer Hours	\$4,770	\$4,770	\$4,770	\$4,770	\$19,080
Total Non DAS Revenue	\$139,746	\$139,746	\$139,746	\$139,746	\$558,984
TOTAL DAS AND NON DAS REVENUE	\$297,977	\$302,724	\$305,983	\$309,308	\$1,215,991
Full Time Equivalent (FTE)	2.15	2.15	2.15	2.15	8.60
Prepared by:					Date:5/21/24
HSA-CO Review Signature:					
HSA #1					

Salaries & Benefits Detail

(Total)

DAS Salaries & Benefits	Agency Totals		HSA Program		7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Executive Director	\$135,000	5%	100.0%	0.05	\$6,750	\$6,750	\$6,750	\$6,750	\$27,000
Empowerment Director	\$75,000	100%	10.0%	0.10	\$7,500	\$7,500	\$7,500	\$7,500	\$30,000
LTCCRA Community Resource Program Manager	\$73,500	100%	69.0%	0.69	\$50,715	\$50,715	\$50,715	\$50,715	\$202,860
Digital Outreach Specialist	\$71,610	10%	100.0%	0.10	\$7,161	\$7,161	\$7,161	\$7,161	\$28,644
Totals	\$355,110	215%	279.0%	0.94	\$72,126	\$72,126	\$72,126	\$72,126	\$288,504
Fringe Benefits Rate	30.00%								
Employee Fringe Benefits Interpretation	\$106,533				\$20,958	\$20,958	\$20,958	\$20,958	\$83,832
Total DAS Salaries and Benefits	\$461,643				\$93,084	\$93,084	\$93,084	\$93,084	\$372,336

HSA #2

Operating Expense Detail

	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	(Total) 7/1/24 - 6/30/28
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Licenses and Fees					
Staff Training					
Staff Travel					
Rental of Equipment					
<u>Consultants/Subcontractors</u>					
Interpretation	\$7,008	\$11,136	\$13,970	\$16,861	\$48,975
ILRC Contract	\$21,000	\$21,000	\$21,000	\$21,000	\$84,000
Peer Advocates	\$16,500	\$16,500	\$16,500	\$16,500	\$66,000
<u>Other</u>					
Total DAS Operating Expenses	\$44,508	\$48,636	\$51,470	\$54,361	\$198,975

HSA #3

APPENDIX A-4, SCOPE OF SERVICES

SENIOR AND DISABILITY ACTION SENIOR AND DISABILITY EMPOWERMENT July 1, 2024 to June 30, 2028

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 a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON City	Contracts Administration, Reporting and Billing On Line System City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS Disability	Department of Disability and Aging Services 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	Classes and/or activities that help participants learn the various components of independent living: accessing essential services, conflict resolution, facilitating effective meetings, leadership skills, community organizing, diversity training and political advocacy
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.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language.
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.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships (previously Office on the Aging/OOA)
Older Adult	Person who is 60 years or older, used interchangeably with senior.
Outreach and Education	The preparation and distribution of materials that inform and advise older adults and adults with disabilities.
Semester	An SDA academic session: four class days with a singular curriculum each day.
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.
Service Unit	The minimum units of services to be provided through this funding.
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>)

Socially Isolated	Having few social relationships and few people to interact with regularly.
Unduplicated Consumer (UDC)	A unique consumer receiving services in Grantee's programs and reflected via enrollment in SF DAS GetCare.

III. Target Population

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs which have been identified as demonstrating the greatest economic and social need:

- Persons with low-income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- An older adult aged 60 years or older *or*
- An adult with a disability, aged 18-59 *and*
- A resident of the City and county of San Francisco

V. Location and Time of Services

Senior and Disability Empowerment services are provided through Senior and Disability Action, located at 222 8th St, San Francisco, CA 94103. Senior and Disability Empowerment services are conducted at locations throughout the City and virtually. Program staff are available by phone Monday-Friday 9:00am-4:30pm.

VI. Services to be Provided

The Older Adults and Adults with Disability Empowerment program has two educational components. The first educates and informs older adults and adults with disabilities on the supportive services available to them and how to access those services. The second 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 and translated into several languages and are free of cost.

Through the Older Adults and Adults with Disabilities Empowerment program, the Grantee will:

1. Design and implement a curriculum to bring consumer information around available services to older adults and adults with disabilities. The series of classes, known as Senior and Disability Survival School (SDSS), train 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 class session includes presentations from a variety of service providers,

agency representatives, and advocates. A class unit is generally one 3-hour class day in person or 1.5 to 2 hours online. Classes are offered in several languages: Chinese, English, Russian and Spanish. Classes are free of cost and offered in neighborhoods throughout San Francisco. (UNIT: one class day; UNIT: one unduplicated student consumer)

2. Design and implement a leadership training curriculum by and for older adults and people with disabilities in San Francisco. Known as Senior and Disability University, classes 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. A class unit is generally one 3-hour class day in person or 1.5 to 2 hours online. Classes are offered in several languages: Chinese, English, Russian and Spanish. Classes are free of cost and offered in neighborhoods throughout San Francisco. (UNIT: one class day; UNIT: one unduplicated student consumer)
3. In conjunction with both educational programs convene the Empowerment Leadership Group to steer the direction of the classes by providing feedback, suggesting class topics and locations and helping with outreach, set-up, and facilitation. Members of the Leadership Group are community representatives, older adults and people with disabilities themselves, and they play a role in planning or facilitating classes. They take part in at least one semester each and meet as a group at least once a year. (UNIT: one community member)

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the tables below:

	FY 24/25	FY 25/26	FY 26/27	FY 27/28
Senior and Disability Survival School				
Unduplicated student consumers	125	125	125	125
Class days	16	16	16	16
Average students per semester	15	15	15	15
Empowerment Leadership Group community member engagement	5	5	5	5

	FY 24/25	FY 25/26	FY 26/27	FY 27/28
Senior and Disability University				
Unduplicated student consumers	100	100	100	100
Class days	16	16	16	16
Average students per semester	15	15	15	15
Empowerment Leadership Group community member engagement	3	3	3	3

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- At least 85% of participants are satisfied with the training, support, consultation and coordination provided.
- At least 85% of participants are able to better understand the services available to them, their rights as consumers, and how to ensure those services and rights.

IX. Reporting and Other Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- 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.
- 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:

Sara Hofverberg
Program Analyst
Department of Disability and
Aging Services
Sara.Hofverberg@SFgov.org

Krystal Rogers
Contract Manager
Human Services Agency
Krystal.Rogers@SFgov.org

X. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance 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 SF DAS 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name	Senior and Disability Action				Term
7/1/24 - 6/30/28					
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
Program: Older Adults and Adults with Disability Empowerment					
Budget Reference Page No.(s)					(Total)
Program Term	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	7/1/24 - 6/30/28
DAS Expenditures					
Salaries & Benefits	\$179,361	\$179,361	\$179,361	\$179,361	\$717,444
Operating Expenses	\$45,550	\$52,298	\$56,931	\$61,657	\$216,436
Subtotal	\$224,911	\$231,659	\$236,292	\$241,018	\$933,880
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$33,737	\$34,749	\$35,444	\$36,153	\$140,083
Total DAS Expenditures	\$258,648	\$266,408	\$271,736	\$277,171	\$1,073,963
Total DAS Revenue	\$258,648	\$266,408	\$271,736	\$277,171	\$1,073,963
Non DAS Revenues					
Metta Fund	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
University Mound Ladies Home	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
San Francisco Foundation	\$37,500	\$37,500	\$37,500	\$37,500	\$150,000
Membership Dues	\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Individual and Corporate Giving	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
Fundraising Event	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
Interest on Investments	\$2,194	\$2,194	\$2,194	\$2,194	\$8,776
Volunteers & Members	\$5,100	\$5,100	\$5,100	\$5,100	\$20,400
Total Non DAS Revenue	\$145,794	\$145,794	\$145,794	\$145,794	\$583,176
TOTAL DAS AND NON DAS REVENUE	\$404,442	\$412,202	\$417,530	\$422,965	\$1,657,139
Full Time Equivalent (FTE)	2.15	2.15	2.15	2.15	8.60
Prepared by:					Date: 05/21/24
HSA-CO Review Signature:					
HSA #1					

Operating Expense Detail

	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/27 - 6/30/28	(Total) 7/1/24 - 6/30/28
DAS Operating Expenses					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Licenses and Fees					
Staff Training	\$12,000	\$12,000	\$12,000	\$12,000	\$48,000
Staff Travel					
Rental of Equipment					
<u>Consultants/Subcontractors</u>					
Consultants - Interpretation	\$22,000	\$22,000	\$22,000	\$22,000	\$88,000
Consultants - Coaching & Capacity Building	\$9,000	\$16,000	\$20,000	\$25,000	\$70,000
Meeting Expenses	\$2,550	\$2,298	\$2,931	\$2,657	\$10,436
<u>Other</u>					
Total DAS Operating Expenses	\$45,550	\$52,298	\$56,931	\$61,657	\$216,436

HSA #3