



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

Department of Benefits
and Family Support

Department of Disability
and Aging Services

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

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: **MULTIPLE GRANTEES (NON-PROFIT)** FOR THE PROVISION OF AN ADULT DAY PROGRAM (ADP) FOR OLDER ADULTS AND ADULTS WITH DISABILITIES AND AN ALZHEIMER’S DAY CARE RESOURCE CENTER (ADCRC) FOR OLDER ADULTS AND ADULTS WITH DISABILITIES (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>
	\$6,305,805	\$630,581	\$6,936,386



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>
	\$1,518,661	\$1,564,221	\$1,595,507	\$1,627,416

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$4,767,189	\$1,538,616		\$630,581	\$6,936,386
PERCENTAGE:	75.6%	24.4%			100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into grant agreements with multiple providers for the period of July 1, 2024 to June 30, 2028, in an amount of \$6,305,805, plus a 10% contingency for a total amount not to exceed \$6,936,386. The purpose of the grants is to support the operational costs of grantees to provide Adult Day Programs (ADPs) and Alzheimer’s Day Care Resource Centers (ADCRCs) services to eligible older adults and adults with disabilities.

ADPs and ADCRCs play an important role in the City's effort to support aging in place by preserving community living and allowing opportunities for individuals to be active and socialize in a safe environment. In addition, these programs support the wellbeing of caregivers through respite, education, and resource connection.

The funding amounts are detailed in the table below.

ADP TABLE:

Grantee	FY24/25	FY25/26	FY26/27	FY27/28	Total	10% Contingency	Not to exceed
Catholic Charities	\$215,859	\$222,335	\$226,782	\$231,318	\$896,294	\$89,629	\$985,923
Institute of Aging	\$130,722	\$134,644	\$137,337	\$140,084	\$542,787	\$54,279	\$597,066
Kimochi	\$74,406	\$76,638	\$78,171	\$79,734	\$308,949	\$30,895	\$339,844
On Lok	\$120,195	\$123,801	\$126,277	\$128,802	\$499,075	\$49,908	\$548,983
Self-help for the Elderly	\$362,682	\$373,562	\$381,033	\$388,654	\$1,505,931	\$150,593	\$1,656,524
Total	\$903,864	\$930,980	\$949,600	\$968,592	\$3,753,036	\$375,304	\$4,128,340

ADCRC TABLE:

Grantee	FY24/25	FY25/26	FY26/27	FY27/28	Total	10% Contingency	Not to exceed
Catholic Charities	\$171,632	\$176,781	\$180,317	\$183,923	\$712,653	\$71,265	\$783,918
Institute of Aging	\$154,204	\$158,830	\$162,007	\$165,247	\$640,288	\$64,029	\$704,317
Self-Help for the Elderly	\$149,005	\$153,475	\$156,545	\$159,675	\$618,700	\$61,870	\$680,570
Steppingstone	\$139,956	\$144,155	\$147,038	\$149,979	\$581,128	\$58,113	\$639,241
Total	\$614,797	\$633,241	\$645,907	\$658,824	\$2,552,769	\$255,277	\$2,808,046

Background

First funded by the City in 1990, Adult Day Programs (ADPs) are distinguished as 'social' day models from Adult Day Health Care (ADHC) programs which offer nursing care and other medical supports. ADPs are community-based programs that provide non-medical care to persons 18 years of age or older in need of personal care services, supervision, or assistance necessary for sustaining Activities of Daily Living (ADL).

Alzheimer's Day Care Resource Centers (ADCRCs) are community-based programs that serve individuals with Alzheimer's disease and other dementia related disorders where their needs make it difficult to participate in other community-based programs. The operation of an ADCRC takes place within the existing structure and licensure of an Adult Day Program or Adult Day Health Care center. ADCRCs uniquely address psychosocial, mental, functional, and

cognitive needs of people with dementia by assisting them to function at their highest level, while providing caregiver support and respite. ADCRCs provide education, training and counseling support to families, caregivers, and the community on topics related to Alzheimer's disease and/or other dementia related disorders.

Services to be Provided

Adult Day Program (ADP):

Grantees will operate an Adult Day Program that is currently licensed by the State licensing department to provide non-medical day program services by trained and competent staff to eligible participants who require care and supervision in a protective setting for a portion of a 24-hour day. Grantee will develop individualized care plans for each participant, considering their unique needs and preferences. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADLs, and supportive counseling.

DAS will fund five grantees for the provision of ADP services throughout the City, on an annual basis, these grantees will collectively provide 92,850 hours of adult day care to over 183 unduplicated consumers.

Alzheimer's Day Care Resource Centers (ADCRCs):

Grantees will operate an Alzheimer's Day Care Resource Center within the framework of a licensed Adult Day Program or Adult Day Health Care center to provide the services necessary to meet the needs of participants with Alzheimer's disease or other dementia related disorders. Grantees will maintain a physical environment suitable for the care of participants with conditions associated with dementia and provide respite for the participant's primary caregivers. There are four components of services to be provided: 1) Alzheimer's day care services, 2) caregiver support, 3) education and training, and 4) volunteer services.

DAS will fund four grantees for the provision of ADCRC programs throughout the City. On an annual basis, these grantees will collectively offer over 80 sessions of education, training or support groups to staff, volunteers, caregivers, and the community on topics related to Alzheimer's disease and provide 55,350 hours of Alzheimer's day care to over 117 unduplicated consumers,

Selection

Grantees were selected through Request for Proposals 1097, which was competitively bid on December 6, 2023.

Funding

Funding for these grants is provided through a combination of State and County General Funds.

ATTACHMENTS

Adult Day Program (ADP):

Catholic Charities

Appendix A: Services to be provided

Appendix B: Program budget

Appendix F: Site Chart

Institute on Aging

Appendix A: Services to be provided

Appendix B: Program budget

Appendix F: Site Chart

Kimochi

Appendix A: Services to be provided

Appendix B: Program budget

Appendix F: Site Chart

On Lok

Appendix A: Services to be provided

Appendix B: Program budget

Appendix F: Site Chart

Self-Help for the Elderly

Appendix A: Services to be provided

Appendix B: Program budget

Appendix F: Site Chart

Alzheimer's Day Care Resource Centers (ADCRCs)

Catholic Charities

Appendix A: Services to be provided

Appendix B: Program budget

Appendix F: Site Chart

Institute on Aging

Appendix A: Services to be provided

Appendix B: Program budget

Appendix F: Site Chart

Self-Help for the Elderly

Appendix A: Services to be provided

Appendix B: Program budget

Appendix F: Site Chart

Stepping Stone

Appendix A: Services to be provided

Appendix B: Program budget

Appendix F: Site Chart

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
Catholic Charities
July 1, 2024 – June 30, 2028
Adult Day Program (ADP)

I. Purpose

The purpose of this grant is to support the operations of licensed Adult Day Programs (ADPs) who provide services to eligible older adults and adults with disabilities. This program aims to foster independence and to keep them in the community by providing opportunities for social, physical, and emotional engagement. The program also provides much needed respite services for caregivers.

II. Definitions

ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, dressing, transfer, bathing, toileting, and grooming.
Adult Day Health Care (ADHC)	A community-based day health program that offers a medical model of care through an outpatient day program for older persons and adults with chronic medical, cognitive, or mental health conditions and/or disabilities who are at risk of needing institutional care. ADHC facilities are licensed by the California Department of Public Health (CDPH).
Adult Day Program (ADP)	A community-based program providing non-medical care to persons 18 years of age or older in need of personal care services, supervision, or the assistance essential for sustaining the activities of daily living or for the protection of the individual on less than a 24-hour basis. ADP facilities are typically licensed by the California Department of Social Services (CDSS). ADHC facilities, with dual licensure from CDPH, can offer ADP services alongside its ADHC services. ADP is not eligible for Centers for Medicare & Medicaid Services (CMS) reimbursement.
Adult with a Disability	A 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, transfer mobility, bathing, toileting, and ambulating 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 Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive 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 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	Catholic Charities
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, gender queer, 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 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, and not to be used as a means test to qualify for the program.
OCM	Office of Contract Management
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior.
SFDAS GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.

Socially Isolated	Having few social relationships and few people to interact with regularly.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).
UDC	Unduplicated Consumer; A unique consumer receiving services in the Grantee's ADP program.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for ADP Services

To be eligible for services, clients must be:

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Adult Day Program services

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an Adult Day Program that is in good standing with the State licensing department. A license in good standing requires that a license is active and not expired, suspended, revoked, surrendered, conditioned, or otherwise in a status that in any manner restricts the activity of a licensee under the authority of the license.

Grantee will provide ADP services to eligible participants who require care and supervision in a protective setting for a portion of a 24-hour day. Grantee will develop individualized care plans

for each participant, considering their unique needs and preferences. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances wherein in-person engagement is not feasible due to public health orders, the grantee will deliver services through virtual, telephonic, and/or other safe methods of engagement.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

Adult Day Care –

The units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

VIII. Service Objectives

	FY24/25	FY25/26	FY26/27	FY27/28
Unduplicated Consumers Served	40	40	40	40
Adult Day Care Hours Provided	18500	18500	18500	18500

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey with a sample size of at least seventy-five percent (75%) of the unduplicated consumer enrollment at the time the survey is administered by the Grantee.

1. Consumers or their caregivers report that the program helped them continue living in the community instead of being institutionalized. Target: 85%
2. Consumers or their caregivers report a positive impact on their wellness by participating in social and/or physical activities offered in the program. Target: 85%
3. Consumers or their caregivers rate the quality of services received from the program as good or excellent. Target: 85%

X. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SFDAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SFDAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
4. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
5. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using a DAS OCP approved intake form, into the SF DAS GetCare database. This will include SOGI data.
8. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
9. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
10. 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.
11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. For assistance with reporting and contract requirements, please contact:

Patrick Garcia
Contracts Manager
Patrick.Garcia@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

Kevin Byrne
Program Analyst
Kevin.P.Byrne@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

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 SFDAS 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; review of 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 VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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**

Grantee/Contractor: Catholic Charities				Full Term:	7/1/24 - 6/30/28
Program: Adult Day Program (ADP)				Effective Date:	
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (check One)				Modification #	
	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
Expenses	Original	Original	Original	Original	Total
Salaries & Benefits	\$152,341	\$155,386	\$158,496	\$161,666	\$627,889
Operating-Direct	\$35,363	\$37,949	\$38,706	\$39,480	\$151,498
Subtotal	\$187,704	\$193,335	\$197,202	\$201,146	\$779,387
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$28,155	\$29,000	\$29,580	\$30,172	\$116,907
CODB Eligible Expenses	\$215,859	\$222,335	\$226,782	\$231,318	\$896,294
Consultant/Subcontractor (\$25,000+)					
Direct Client Pass-Through					
Capital Expenses					
Total Expenses	\$215,859	\$222,335	\$226,782	\$231,318	\$896,294
HSA / DAS Revenues					
Total HSA / DAS Revenues	\$215,859	\$222,335	\$226,782	\$231,318	\$896,294
Grantee/Contractor Revenues					
Total Grantee/Contractor Revenues					
Total Revenues	\$215,859	\$222,335	\$226,782	\$231,318	\$896,294
Prepared by:					
<i>Telephone No. & Email:</i>				<i>HSA Budget Form (3/24)</i>	

Grantee/Contractor: Catholic Charities Program: Adult Day Program (ADP)																				Appendix B, Page 2							
Salaries & Benefits Detail																											
POSITION TITLE	Agency Totals		HSA Program		7/1/24 - 6/30/25		Agency Totals		HSA Program		7/1/25 - 6/30/26		Agency Totals		HSA Program		7/1/26 - 6/30/27		Agency Totals		HSA Program		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	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total	
Associate Deputy Director	\$165,764	0.20	35%	0.07	\$11,603	\$169,079	0.20	35%	0.07	\$11,836	\$172,461	0.20	35%	0.07	\$12,072	\$175,910	0.20	35%	0.07	\$12,314	\$179,354	0.20	35%	0.07	\$12,550	\$182,803	\$47,825
Program Director	\$84,457	1.00	33%	0.33	\$27,871	\$86,146	1.00	33%	0.33	\$28,428	\$87,869	1.00	33%	0.33	\$28,997	\$89,627	1.00	33%	0.33	\$29,577	\$91,404	1.00	33%	0.33	\$30,157	\$93,181	\$114,873
Activity/Volunteer Coordinator	\$57,710	1.00	42%	0.42	\$24,238	\$58,864	1.00	42%	0.42	\$24,723	\$60,042	1.00	42%	0.42	\$25,218	\$61,242	1.00	42%	0.42	\$25,722	\$62,442	1.00	42%	0.42	\$26,226	\$63,642	\$99,901
Prog/Activity Asst- #1	\$51,154	1.00	43%	0.43	\$21,740	\$52,177	1.00	43%	0.43	\$22,175	\$53,220	1.00	43%	0.43	\$22,619	\$54,285	1.00	43%	0.43	\$23,071	\$55,350	1.00	43%	0.43	\$23,514	\$56,415	\$89,605
Food Srv Coord - Act Asst	\$48,340	0.85	27%	0.23	\$10,889	\$49,307	0.85	27%	0.23	\$11,106	\$50,293	0.85	27%	0.23	\$11,328	\$51,299	0.85	27%	0.23	\$11,555	\$52,305	0.85	27%	0.23	\$11,777	\$53,311	\$44,878
Senior Program Admin	\$85,207	0.25	88%	0.22	\$18,746	\$86,911	0.25	88%	0.22	\$19,120	\$88,649	0.25	88%	0.22	\$19,503	\$90,422	0.25	88%	0.22	\$19,893	\$92,215	0.25	88%	0.22	\$20,286	\$94,008	\$77,262
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				-					-					-					-						-		
TOTALS	\$492,632	4.30	2.67	1.69	\$115,087	\$502,484	4.30	267%	1.69	\$117,388	\$512,534	4.30	267%	1.69	\$119,737	\$522,785	4.30	267%	1.69	\$122,132	\$533,036	4.30	267%	1.69	\$124,481	\$543,287	\$474,344
FRINGE BENEFIT RATE	32%								32%					32%					32%								
EMPLOYEE FRINGE BENEFITS					\$37,254				\$37,998					\$38,759					\$39,534						\$39,534	\$153,545	
TOTAL SALARIES & BENEFITS					\$152,341				\$155,386					\$158,496					\$161,666						\$161,666	\$627,889	

HSA Budget Form (3/24)

Grantee/Contractor: Catholic Charities
Program: Adult Day Program (ADP)

Appendix B, Page 3

Operating Expenses Detail

Expenditure Category	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
	Original	Original	Original	Original	Total
Rental of Property	\$26,400	\$28,920	\$29,497	\$30,366	\$115,183
Utilities(Elec, Water, Gas, Phone, Garbage)	\$6,491	\$6,507	\$6,637	\$6,491	\$26,126
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance	\$2,472	\$2,522	\$2,572	\$2,623	\$10,189
Staff Training					
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
Consultant/Subcontractor (\$25,000 & Under)					
Other					
Total Operating Expense	\$35,363	\$37,949	\$38,706	\$39,480	\$151,498

HSA Budget Form (3/24)

SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

PROGRAM: Adult Day Program (ADP)

FISCAL YEAR: 07/01/2024 - 06/30/2028

AGENCY: Catholic Charities San Francisco

DIRECTOR: Kelly Phelps

PHONE No: 415-452-3500

SITES:					
Name of Site	Catholic Charities San Francisco				
Address and Zip	50 Broad Street San Francisco, CA 94112				
Phone Number	415-452-3500				
Fax Number	415-452-3505				
Neighborhood	City of San Francisco District 11				
Muni Line #s	"M" and Bus 54				
Person in Charge	Kelly Phelps				
Site Manger	Kelly Phelps				
Programs Offered at Site	ADP Scheduled Activities				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun				
Hours Open	8:00 AM – 5:00 PM				
Hours of <u>scheduled</u> programming	10:00 AM – 3:00 PM				
Hours of service	8:00 AM – 5:00 PM				
Annual number of units at site	18,500				
Average number of units per day	75				
Total number of service days in FY	246				
Days closed	New Year's Day/Martin Luther King Day/President's Day/ Good Friday/ Juneteenth/ Memorial Day/ 4 th of July / Labor Day/ Thanksgiving Day /Black Friday /Christmas Eve /Christmas Day/ 2 Training Days				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Institute on Aging
July 1, 2024 – June 30, 2028
Adult Day Program (ADP)

I. Purpose

The purpose of this grant is to support the operations of licensed Adult Day Programs (ADPs) who provide services to eligible older adults and adults with disabilities. This program aims to foster independence and to keep them in the community by providing opportunities for social, physical, and emotional engagement. The program also provides much needed respite services for caregivers.

II. Definitions

ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, dressing, transfer, bathing, toileting, and grooming.
Adult Day Health Care (ADHC)	A community-based day health program that offers a medical model of care through an outpatient day program for older persons and adults with chronic medical, cognitive, or mental health conditions and/or disabilities who are at risk of needing institutional care. ADHC facilities are licensed by the California Department of Public Health (CDPH).
Adult Day Program (ADP)	A community-based program providing non-medical care to persons 18 years of age or older in need of personal care services, supervision, or the assistance essential for sustaining the activities of daily living or for the protection of the individual on less than a 24-hour basis. ADP facilities are typically licensed by the California Department of Social Services (CDSS). ADHC facilities, with dual licensure from CDPH, can offer ADP services alongside its ADHC services. ADP is not eligible for Centers for Medicare & Medicaid Services (CMS) reimbursement.
Adult with a Disability	A 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, transfer mobility, bathing, toileting, and ambulating 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 Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive 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 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	Institute on Aging
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, gender queer, 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 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, and not to be used as a means test to qualify for the program.
OCM	Office of Contract Management
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior.
SFDAS GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.

Socially Isolated	Having few social relationships and few people to interact with regularly.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).
UDC	Unduplicated Consumer; A unique consumer receiving services in the Grantee's ADP program.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for ADP Services

To be eligible for services, clients must be:

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Adult Day Program services

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an Adult Day Program that is in good standing with the State licensing department. A license in good standing requires that a license is active and not expired, suspended, revoked, surrendered, conditioned, or otherwise in a status that in any manner restricts the activity of a licensee under the authority of the license.

Grantee will provide ADP services to eligible participants who require care and supervision in a protective setting for a portion of a 24-hour day. Grantee will develop individualized care plans

for each participant, considering their unique needs and preferences. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances wherein in-person engagement is not feasible due to public health orders, the grantee will deliver services through virtual, telephonic, and/or other safe methods of engagement.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

Adult Day Care –

The units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

VIII. Service Objectives

	FY24/25	FY25/26	FY26/27	FY27/28
Unduplicated Consumers Served	33	33	33	33
Adult Day Care Hours Provided	12350	12350	12350	12350

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey with a sample size of at least seventy-five percent (75%) of the unduplicated consumer enrollment at the time the survey is administered by the Grantee.

1. Consumers or their caregivers report that the program helped them continue living in the community instead of being institutionalized. Target: 85%
2. Consumers or their caregivers report a positive impact on their wellness by participating in social and/or physical activities offered in the program. Target: 85%
3. Consumers or their caregivers rate the quality of services received from the program as good or excellent. Target: 85%

X. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SFDAS GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the SFDAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
4. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
5. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using a DAS OCP approved intake form, into the SF DAS GetCare database. This will include SOGI data.
8. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
9. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
10. 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.
11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. For assistance with reporting and contract requirements, please contact:

Tara Alvarez
Contracts Manager

P.O. Box 7988
San Francisco, CA 94120
Tara.Alvarez@sfgov.org

Sarah Chan
Program Analyst

P.O. Box 7988
San Francisco, CA 94120
Sarah.Chan@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 SFDAS 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; review of 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 VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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**

Grantee/Contractor: Institute on Aging					7/1/24 - 6/30/28
Program: Adult Day Program					
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (Check One)					
	FY24/25	FY25/26	FY26/27	FY27/28	7/1/24 - 6/30/28
Expenses	Original	Original	Original	Original	Total
Salaries & Benefits	\$103,993	\$107,114	\$109,256	\$111,440	\$431,803
Operating-Direct	\$9,678	\$9,968	\$10,167	\$10,372	\$40,185
Subtotal	\$113,671	\$117,082	\$119,423	\$121,812	\$471,988
Indirect Percentage (%)	\$0	\$0	\$0	\$0	\$0
Indirect Costs (Line 16 X Line 15)	\$17,051	\$17,562	\$17,914	\$18,272	\$70,799
CODB Eligible Expenses	\$130,722	\$134,644	\$137,337	\$140,084	\$542,787
Total Expenses	\$130,722	\$134,644	\$137,337	\$140,084	\$542,787
HSA / DAS Revenues					
Total HSA / DAS Revenues	\$130,722	\$134,644	\$137,337	\$140,084	\$542,787
Grantee/Contractor Revenues					
					\$ -
					\$ -
					\$ -
					\$ -
Total Grantee/Contractor Revenues					
Total Revenues	\$130,722	\$134,644	\$137,337	\$140,084	\$542,787
Prepared by: Jade Luo					
<i>Telephone No. & Email:</i>					<i>HSA Budget Form (3/24)</i>

Grantee/Contractor: Institute on Aging
 Program: Adult Day Progra

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		FY24/25		Agency Totals		HSA Program		FY25/26		Agency Totals		HSA Program		FY26/27		Agency Totals		HSA Program		FY27/28		7/1/24 - 6/30/28	
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total	Original	Total			
Manager, Enrichment Center Program	\$113,300	1.00	50%	0.50	\$56,650	\$116,699	1.00	50%	0.50	\$58,350	\$119,033	1.00	50%	0.50	\$59,517	\$121,414	1.00	50%	0.50	\$60,707	\$235,224					
Program Coordinator, Senior	\$64,401	1.00	25%	0.25	\$16,100	\$66,333	1.00	25%	0.25	\$16,583	\$67,660	1.00	25%	0.25	\$16,915	\$69,013	1.00	25%	0.25	\$17,253	\$66,851					
Engagement Coordinator	\$69,628	\$1	\$0	\$0	\$10,444	\$71,717	\$1	\$0	\$0	\$10,758	\$73,151	1.00	15%	0.15	\$10,973	\$74,614	1.00	15%	0.15	\$11,192	\$43,367					
TOTALS	\$247,329	\$3	\$1	\$1	\$83,194	\$254,749	\$3	\$1	\$1	\$85,691	\$259,844	3.00	90%	0.90	\$87,405	\$265,041	3.00	90%	0.90	\$89,152	\$345,442					
FRINGE BENEFIT RATE	\$0					\$0					25%					25%										
EMPLOYEE FRINGE BENEFITS					\$20,799					\$21,423					\$21,851					\$22,288	\$86,361					
TOTAL SALARIES & BENEFITS					\$103,993					\$107,114					\$109,256					\$111,440	\$431,803					

HSA Budget Form (3/24)

Grantee/Contractor: Institute on Aging
Program: Adult Day Progra

Appendix B, Page 3

Operating Expenses Detail

	FY24/25 Original	FY25/26 Original	FY26/27 Original	FY27/28 Original	7/1/24 - 6/30/28 Total
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Garbage)					
Office Supplies, Postage	\$500	\$500	\$500	\$500	\$2,000
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance	\$350	\$350	\$350	\$350	\$1,400
Staff Training					
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
<u>Consultant/Subcontractor (\$25,000 & Under)</u>					
<u>Other</u>					
Licenses and Fees	\$2,600	\$2,600	\$2,600	\$2,600	\$10,400
Food Supplies	\$3,328	\$3,618	\$3,817	\$4,022	\$14,785
Client Transportation	\$2,400	\$2,400	\$2,400	\$2,400	\$9,600
Program Supplies	\$500	\$500	\$500	\$500	\$2,000
Total Operating Expense	\$9,678	\$9,968	\$10,167	\$10,372	\$40,185

HSA Budget Form (3/24)

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

PROGRAM: ADP

FISCAL YEAR: 07/01/2024 - 06/30/2028 for ADP

AGENCY: Institute on Aging

DIRECTOR: J. Thomas Briody

PHONE No: (415) 728-9260

SITES:					
Name of Site	The Enrichment Center	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Address and Zip	386 Moraga Ave	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Phone Number	(415) 728-9260	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Fax Number	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Neighborhood	Presidio	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Muni Line #s	PresidGo, 43 Muni	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Person in Charge	Stephanie Schmutz	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Site Manager	Clara Allen	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Programs Offered at Site	ADP, ADCRC, Companioa	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9am-3pm; extended hours as needed as staff are on site 8am-5pm	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of <u>scheduled</u> programming	9am-3pm	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of service	12,350	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Annual number of units at site	33 clients	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Average number of units per day	31 clients	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Total number of service days in FY	252	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days closed	New Year's Day, Martin Luther King Jr. Day, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, The day after Thanksgiving Day, Christmas Day	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Kimochi, Inc.

July 1, 2024 – June 30, 2028

Adult Day Program (ADP)

I. Purpose

The purpose of this grant is to support the operations of licensed Adult Day Programs (ADPs) who provide services to eligible older adults and adults with disabilities. This program aims to foster independence and to keep them in the community by providing opportunities for social, physical, and emotional engagement. The program also provides much needed respite services for caregivers.

II. Definitions

ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, dressing, transfer, bathing, toileting, and grooming.
Adult Day Health Care (ADHC)	A community-based day health program that offers a medical model of care through an outpatient day program for older persons and adults with chronic medical, cognitive, or mental health conditions and/or disabilities who are at risk of needing institutional care. ADHC facilities are licensed by the California Department of Public Health (CDPH).
Adult Day Program (ADP)	A community-based program providing non-medical care to persons 18 years of age or older in need of personal care services, supervision, or the assistance essential for sustaining the activities of daily living or for the protection of the individual on less than a 24-hour basis. ADP facilities are typically licensed by the California Department of Social Services (CDSS). ADHC facilities, with dual licensure from CDPH, can offer ADP services alongside its ADHC services. ADP is not eligible for Centers for Medicare & Medicaid Services (CMS) reimbursement.
Adult with a Disability	A 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, transfer mobility, bathing, toileting, and ambulating 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 Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive 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 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	Kimochi, Inc.
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, gender queer, 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 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, and not to be used as a means test to qualify for the program.
OCM	Office of Contract Management
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior.
SFDAS GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.

Socially Isolated	Having few social relationships and few people to interact with regularly.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).
UDC	Unduplicated Consumer; A unique consumer receiving services in the Grantee's ADP program.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
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- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for ADP Services

To be eligible for services, clients must be:

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
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V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

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Grantee will operate an Adult Day Program that is in good standing with the State licensing department. A license in good standing requires that a license is active and not expired, suspended, revoked, surrendered, conditioned, or otherwise in a status that in any manner restricts the activity of a licensee under the authority of the license.

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for each participant, considering their unique needs and preferences. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances wherein in-person engagement is not feasible due to public health orders, the grantee will deliver services through virtual, telephonic, and/or other safe methods of engagement.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

Adult Day Care –

The units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

VIII. Service Objectives

	FY24/25	FY25/26	FY26/27	FY27/28
Unduplicated Consumers Served	45	45	45	45
Adult Day Care Hours Provided	30000	30000	30000	30000

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey with a sample size of at least seventy-five percent (75%) of the unduplicated consumer enrollment at the time the survey is administered by the Grantee.

1. Consumers or their caregivers report that the program helped them continue living in the community instead of being institutionalized. Target: 85%
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11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. For assistance with reporting and contract requirements, please contact:

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

Kevin Byrne
Program Analyst
Kevin.P.Byrne@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

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 SFDAS 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; review of 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 VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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**

Grantee: Kimochi			Full Term:	7/1/24 - 6/30/28	
Program: Adult Day Program			Effective Date:		
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (Check One)			Modification #		
	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
Expenses	Original	Original	Original	Original	Total
Salaries & Benefits	\$58,426	\$60,179	\$61,984	\$63,843	\$244,432
Operating-Direct	\$6,500	\$6,500	\$6,500	\$6,500	\$26,000
Subtotal	\$64,926	\$66,679	\$68,484	\$70,343	\$270,432
Indirect Percentage (%)	15%	15%	14%	13%	14%
Indirect Costs (Line 16 X Line 15)	\$9,480	\$9,959	\$9,687	\$9,391	\$38,517
CODB Eligible Expenses	\$74,406	\$76,638	\$78,171	\$79,734	\$308,949
Consultant/Subcontractor (\$25,000+)					
Direct Client Pass-Through					
Capital Expenses					
Total Expenses	\$74,406	\$76,638	\$78,171	\$79,734	\$308,949
Total HSA / DAS Revenues	\$74,406	\$76,638	\$78,171	\$79,734	\$308,949
Grantee/Contractor Revenues					
Total Grantee/Contractor Revenues					
Total Revenues	\$74,406	\$76,638	\$78,171	\$79,734	\$308,949
Prepared by: Rod Valdepenas					
<i>Telephone No. & Email: (415) 931-2294</i>				<i>HSA Budget Form (3/24)</i>	

Salaries & Benefits Detail																					Appendix B, Page 2 5/17/2024						
POSITION TITLE	Agency Totals		HSA Program		7/1/24 - 6/30/25		Agency Totals		HSA Program		7/1/25 - 6/30/26		Agency Totals		HSA Program		7/1/26 - 6/30/27		Agency Totals		HSA Program		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	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total					Original	Total
ADP Coordinator	\$44,262	1.00	100%	1.00	\$44,262	\$45,590	1.00	100%	1.00	\$45,590	\$46,958	1.00	100%	1.00	\$46,958	\$48,367	1.00	100%	1.00	\$48,366	\$185,176						
TOTALS	\$44,262	1.00	1.00	1.00	\$44,262	\$45,590	1.00	100%	1.00	\$45,590	\$46,958	1.00	100%	1.00	\$46,958	\$48,367	1.00	100%	1.00	\$48,366	\$185,176						
FRINGE BENEFIT RATE	32%					32%				32%					32%					32%							
EMPLOYEE FRINGE BENEFITS					\$14,164					\$14,589					\$15,026					\$15,477	\$59,256						
TOTAL SALARIES & BENEFITS					\$58,426					\$60,179					\$61,984					\$63,843	\$244,432						

HSA Budget Form (3/24)

Grantee: Kimochi
Program: Adult Day Program

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 5/17/2024

Operating Expenses Detail

<u>Expenditure Category</u>	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
	Original	Original	Original	Original	Total
Utilities(Elec, Water, Gas, Phone, Garbage)	\$4,500	\$4,500	\$4,500	\$4,500	\$18,000
Supplies	\$2,000	\$2,000	\$2,000	\$2,000	\$8,000
Total Operating Expense	\$6,500	\$6,500	\$6,500	\$6,500	\$26,000

HSA Budget Form (3/24)

Appendix- F-SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

PROGRAM: Adult Day Program

FISCAL YEAR: 07/01/2024 - 06/30/2025

AGENCY: Kimochi, Inc.

DIRECTOR: Steve Ishii

PHONE No: 415-931-2294

SITES:					
Name of Site	Kimochi Home				
Address and Zip	1531 Sutter Street, 94115				
Phone Number	415-922-9972				
Fax Number	415-922-6821				
Neighborhood	Japantown/Western Addition				
Muni Line #s	2, 3, 22, 38				
Person in Charge	Sandy Ishii				
Site Manger	Linda Ishii				
Programs Offered at Site	Adult Day Program Congregate Lunch Residential/Respite Care				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00 a.m. - 5:00 p.m.				
Hours of <u>scheduled</u> programming	9:30 a.m. – 3:30 p.m.				
Hours of service	9:00 a.m. – 5:00 p.m.				
Annual number of units at site	30,000				
Average number of units per day	120				
Total number of service days in FY	249				
Days closed	Saturday, Sunday, Federal Bank Holidays				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

On Lok

July 1, 2024 – June 30, 2028

Adult Day Program (ADP)

I. Purpose

The purpose of this grant is to support the operations of licensed Adult Day Programs (ADPs) who provide services to eligible older adults and adults with disabilities. This program aims to foster independence and to keep them in the community by providing opportunities for social, physical, and emotional engagement. The program also provides much needed respite services for caregivers.

II. Definitions

ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, dressing, transfer, bathing, toileting, and grooming.
Adult Day Health Care (ADHC)	A community-based day health program that offers a medical model of care through an outpatient day program for older persons and adults with chronic medical, cognitive, or mental health conditions and/or disabilities who are at risk of needing institutional care. ADHC facilities are licensed by the California Department of Public Health (CDPH).
Adult Day Program (ADP)	A community-based program providing non-medical care to persons 18 years of age or older in need of personal care services, supervision, or the assistance essential for sustaining the activities of daily living or for the protection of the individual on less than a 24-hour basis. ADP facilities are typically licensed by the California Department of Social Services (CDSS). ADHC facilities, with dual licensure from CDPH, can offer ADP services alongside its ADHC services. ADP is not eligible for Centers for Medicare & Medicaid Services (CMS) reimbursement.
Adult with a Disability	A 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, transfer mobility, bathing, toileting, and ambulating 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 Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive 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 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	On Lok
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, gender queer, 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 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, and not to be used as a means test to qualify for the program.
OCM	Office of Contract Management
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior.
SFDAS GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.

Socially Isolated	Having few social relationships and few people to interact with regularly.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).
UDC	Unduplicated Consumer; A unique consumer receiving services in the Grantee's ADP program.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for ADP Services

To be eligible for services, clients must be:

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Adult Day Program services

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an Adult Day Program that is in good standing with the State licensing department. A license in good standing requires that a license is active and not expired, suspended, revoked, surrendered, conditioned, or otherwise in a status that in any manner restricts the activity of a licensee under the authority of the license.

Grantee will provide ADP services to eligible participants who require care and supervision in a protective setting for a portion of a 24-hour day. Grantee will develop individualized care plans

for each participant, considering their unique needs and preferences. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances wherein in-person engagement is not feasible due to public health orders, the grantee will deliver services through virtual, telephonic, and/or other safe methods of engagement.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

Adult Day Care –

The units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

VIII. Service Objectives

	FY24/25	FY25/26	FY26/27	FY27/28
Unduplicated Consumers Served	35	35	35	35
Adult Day Care Hours Provided	17000	17000	17000	17000

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey with a sample size of at least seventy-five percent (75%) of the unduplicated consumer enrollment at the time the survey is administered by the Grantee.

1. Consumers or their caregivers report that the program helped them continue living in the community instead of being institutionalized. Target: 85%
2. Consumers or their caregivers report a positive impact on their wellness by participating in social and/or physical activities offered in the program. Target: 85%
3. Consumers or their caregivers rate the quality of services received from the program as good or excellent. Target: 85%

X. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SFDAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SFDAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
4. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
5. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using a DAS OCP approved intake form, into the SF DAS GetCare database. This will include SOGI data.
8. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
9. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
10. 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.
11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. For assistance with reporting and contract requirements, please contact:

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

Kevin Byrne
Program Analyst
Kevin.P.Byrne@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

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 SFDAS 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; review of 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 VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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**

Grantee: On Lok Day Services				Full Term:	7/1/24 - 6/30/28
Program: Adult Day Program				Effective Date:	
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (check One)				Modification #	
	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
Expenses	Original	Original	Original	Original	Total
Salaries & Benefits	\$68,897	\$70,963	\$72,381	\$73,830	\$286,071
Operating-Direct	\$35,620	\$36,690	\$37,425	\$38,172	\$147,907
Subtotal	\$104,517	\$107,653	\$109,806	\$112,002	\$433,978
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$15,678	\$16,148	\$16,471	\$16,800	\$65,097
CODB Eligible Expenses	\$120,195	\$123,801	\$126,277	\$128,802	\$499,075
Consultant/Subcontractor (\$25,000+)					
Direct Client Pass-Through					
Capital Expenses					
Total Expenses	\$120,195	\$123,801	\$126,277	\$128,802	\$499,075
HSA / DAS Revenues					
Total HSA / DAS Revenues	\$120,195	\$123,801	\$126,277	\$128,802	\$499,075
Grantee/Contractor Revenues					
Agency Cash - Fundraising	\$751,421	\$980,421	\$980,421	\$980,421	\$3,692,685
Project Income - PACE	\$38,220	\$38,220	\$38,220	\$38,220	\$152,880
San Francisco Human Rights Commission	\$175,000				\$175,000
Bridge to Recovery Grant Program	\$54,000				\$54,000
Total Grantee/Contractor Revenues	\$1,018,641	\$1,018,641	\$1,018,641	\$1,018,641	\$4,074,565
Total Revenues	\$1,138,836	\$1,142,442	\$1,144,918	\$1,147,443	\$4,573,640
Prepared by: Meko Ma					
Telephone No. & Email: 628-208-8546				HSA Budget Form (3/24)	

Grantee: On Lok Day Services Program: Adult Day Program																				Appendix B, Page 2 5/17/2024							
Salaries & Benefits Detail																											
POSITION TITLE	Agency Totals		HSA Program		7/1/24 - 6/30/25		Agency Totals		HSA Program		7/1/25 - 6/30/26		Agency Totals		HSA Program		7/1/26 - 6/30/27		Agency Totals		HSA Program		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	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total	
Dir Senior Prog - Day Svc	\$163,863	0.30	5%	0.02	\$2,458	\$168,779	0.30	5%	0.02	\$2,532	\$172,154	0.30	5%	0.02	\$2,583	\$175,597	0.30	5%	0.02	\$2,635	\$178,932	0.30	5%	0.02	\$2,687	\$182,267	\$10,208
Adult Day Prog Mgr - ADP	\$95,764	1.00	10%	0.10	\$9,576	\$98,637	1.00	10%	0.10	\$9,863	\$100,610	1.00	10%	0.10	\$10,060	\$102,622	1.00	10%	0.10	\$10,261	\$104,633	1.00	10%	0.10	\$10,462	\$106,644	\$39,760
Activity Therapist - ADP	\$80,767	1.00	10%	0.10	\$8,077	\$83,190	1.00	10%	0.10	\$8,319	\$84,854	1.00	10%	0.10	\$8,485	\$86,551	1.00	10%	0.10	\$8,655	\$88,206	1.00	10%	0.10	\$8,821	\$89,861	\$33,536
Activity Therapist - ADP	\$80,767	1.00	10%	0.10	\$8,077	\$83,190	1.00	10%	0.10	\$8,319	\$84,854	1.00	10%	0.10	\$8,485	\$86,551	1.00	10%	0.10	\$8,655	\$88,206	1.00	10%	0.10	\$8,821	\$89,861	\$33,536
Activity Leader	\$68,952	1.00	10%	0.10	\$6,895	\$71,021	1.00	10%	0.10	\$7,102	\$72,441	1.00	10%	0.10	\$7,244	\$73,890	1.00	10%	0.10	\$7,389	\$75,338	1.00	10%	0.10	\$7,533	\$76,787	\$28,630
Center Coordinator	\$67,080	0.50	10%	0.05	\$3,354	\$69,092	0.50	10%	0.05	\$3,455	\$70,474	0.50	10%	0.05	\$3,524	\$71,883	0.50	10%	0.05	\$3,594	\$73,277	0.50	10%	0.05	\$3,663	\$74,671	\$13,927
Caregiver 1 - ADP	\$54,268	1.00	10%	0.10	\$5,427	\$55,896	1.00	10%	0.10	\$5,590	\$57,014	1.00	10%	0.10	\$5,702	\$58,154	1.00	10%	0.10	\$5,816	\$59,296	1.00	10%	0.10	\$5,930	\$60,436	\$22,535
Caregiver 1 - ADP	\$54,080	1.00	10%	0.10	\$5,408	\$55,702	1.00	10%	0.10	\$5,570	\$56,816	1.00	10%	0.10	\$5,681	\$57,952	1.00	10%	0.10	\$5,795	\$59,087	1.00	10%	0.10	\$5,909	\$60,222	\$22,454
Caregiver 1 - ADP	\$54,080	1.00	10%	0.10	\$5,408	\$55,702	1.00	10%	0.10	\$5,570	\$56,816	1.00	10%	0.10	\$5,681	\$57,952	1.00	10%	0.10	\$5,795	\$59,087	1.00	10%	0.10	\$5,909	\$60,222	\$22,454
TOTALS	\$719,621	7.80	0.85	0.77	\$54,680	\$741,210	7.80	85%	0.77	\$56,320	\$756,033	7.80	85%	0.77	\$57,445	\$771,152	7.80	85%	0.77	\$58,595	\$786,297	7.80	85%	0.77	\$79,745	\$801,442	\$227,040
FRINGE BENEFIT RATE	26%									26%					26%					26%							
EMPLOYEE FRINGE BENEFITS					\$14,217					\$14,643					\$14,936					\$15,235						\$59,031	
TOTAL SALARIES & BENEFITS					\$68,897					\$70,963					\$72,381					\$73,830						\$286,071	

HSA Budget Form (3/24)

Grantee: On Lok Day Services
Program: Adult Day Program

Appendix B, Page 3
 5/17/2024

Operating Expenses Detail

<u>Expenditure Category</u>	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/26 - 6/30/27 Original	7/1/27 - 6/30/28 Original	7/1/24 - 6/30/28 Total
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Garbage)	\$1,567	\$1,615	\$1,648	\$1,680	\$6,510
Office Supplies, Postage	\$2,608	\$2,686	\$2,740	\$2,795	\$10,829
Building Maintenance Supplies and Repair					
Printing and Reproduction	\$337	\$347	\$354	\$361	\$1,399
Insurance	\$1,203	\$1,239	\$1,264	\$1,289	\$4,995
Staff Training	\$3,000	\$3,090	\$3,152	\$3,215	\$12,457
Staff Travel-(Local & Out of Town)	\$1,251	\$1,289	\$1,315	\$1,341	\$5,196
Rental of Equipment					
Consultant/Subcontractor (\$25,000 & Under)					
Activity Contractors	\$2,520	\$2,596	\$2,648	\$2,701	\$10,465
Other					
Software	\$3,658	\$3,768	\$3,843	\$3,920	\$15,189
Program Supplies	\$5,000	\$5,150	\$5,253	\$5,358	\$20,761
Senior Outing	\$3,273	\$3,371	\$3,438	\$3,507	\$13,589
Transportation Services	\$10,000	\$10,300	\$10,506	\$10,716	\$41,522
Recruiting	\$1,203	\$1,239	\$1,264	\$1,289	\$4,995
Total Operating Expense	\$35,620	\$36,690	\$37,425	\$38,172	\$147,907

HSA Budget Form (3/24)

SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

PROGRAM: Openhouse+On Lok Community Day Services -Adult Day Program

FISCAL YEAR: 07/01/2024- 06/30/2028

AGENCY: On Lok Day Services

DIRECTOR: John Blazek, ED/CDO jblazek@onlok.org Sandra Rivas Director/Administrador srivas@onlok.org PHONE No: 415-292-8302

SITES:	Openhouse + On Lok Community Day Services				
Name of Site		Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Address and Zip	75 Laguna St. San Francisco, CA 94102	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Phone Number	415-292-8302	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Fax Number	N/A	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Neighborhood	D8	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Muni Line #s	F, Judah, Church	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Person in Charge	Sandra Rivas	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Site Manger	Suli Waqa	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Programs Offered at Site	Adult Day Program: Care Coordination/Supervision, Meals, Therapeutic Activities, Transportation	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days Open	<input type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8:30 am – 5pm	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of <u>scheduled</u> programming	10am – 4pm	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of service	10am-4pm	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Annual number of units at site	17,000	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Average number of units per day	210	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Total number of service days in FY	260	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days closed	Sunday, Monday and Closed 3rd Saturday of the month and holidays. For holiday falling on a Monday closed Saturday following.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Commented [TR1]: Please update based on current schedule. I pulled 260 for the total number of service days from the previous app, but I don't know if that's still accurate.

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
 Self-Help for the Elderly
 July 1, 2024 – June 30, 2028
 Adult Day Program (ADP)

I. Purpose

The purpose of this grant is to support the operations of licensed Adult Day Programs (ADPs) who provide services to eligible older adults and adults with disabilities. This program aims to foster independence and to keep them in the community by providing opportunities for social, physical, and emotional engagement. The program also provides much needed respite services for caregivers.

II. Definitions

ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, dressing, transfer, bathing, toileting, and grooming.
Adult Day Health Care (ADHC)	A community-based day health program that offers a medical model of care through an outpatient day program for older persons and adults with chronic medical, cognitive, or mental health conditions and/or disabilities who are at risk of needing institutional care. ADHC facilities are licensed by the California Department of Public Health (CDPH).
Adult Day Program (ADP)	A community-based program providing non-medical care to persons 18 years of age or older in need of personal care services, supervision, or the assistance essential for sustaining the activities of daily living or for the protection of the individual on less than a 24-hour basis. ADP facilities are typically licensed by the California Department of Social Services (CDSS). ADHC facilities, with dual licensure from CDPH, can offer ADP services alongside its ADHC services. ADP is not eligible for Centers for Medicare & Medicaid Services (CMS) reimbursement.
Adult with a Disability	A 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, transfer mobility, bathing, toileting, and ambulating 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 Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive 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 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	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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, gender queer, 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 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, and not to be used as a means test to qualify for the program.
OCM	Office of Contract Management
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior.
SFDAS GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.

Socially Isolated	Having few social relationships and few people to interact with regularly.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).
UDC	Unduplicated Consumer; A unique consumer receiving services in the Grantee's ADP program.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for ADP Services

To be eligible for services, clients must be:

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Adult Day Program services

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an Adult Day Program that is in good standing with the State licensing department. A license in good standing requires that a license is active and not expired, suspended, revoked, surrendered, conditioned, or otherwise in a status that in any manner restricts the activity of a licensee under the authority of the license.

Grantee will provide ADP services to eligible participants who require care and supervision in a protective setting for a portion of a 24-hour day. Grantee will develop individualized care plans for each participant, considering their unique needs and preferences. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances wherein in-person engagement is not feasible due to public health orders, the grantee will deliver services through virtual, telephonic, and/or other safe methods of engagement.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

Adult Day Care –

The units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

VIII. Service Objectives

	FY24/25	FY25/26	FY26/27	FY27/28
Unduplicated Consumers Served	30	30	30	30
Adult Day Care Hours Provided	15000	15000	15000	15000

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey with a sample size of at least seventy-five percent (75%) of the unduplicated consumer enrollment at the time the survey is administered by the Grantee.

1. Consumers or their caregivers report that the program helped them continue living in the community instead of being institutionalized. Target: 85%
2. Consumers or their caregivers report a positive impact on their wellness by participating in social and/or physical activities offered in the program. Target: 85%
3. Consumers or their caregivers rate the quality of services received from the program as good or excellent. Target: 85%

X. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SFDAS GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the SFDAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
4. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
5. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using a DAS OCP approved intake form, into the SF DAS GetCare database. This will include SOGI data.
8. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
9. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
10. 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.
11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. For assistance with reporting and contract requirements, please contact:

Tahir Shaikh
Contracts Manager
Tahir.Shaikh@sfgov.org

Kevin Byrne
Program Analyst
Kevin.P.Byrne@sfgov.org

P.O. Box 7988
San Francisco, CA 94120

P.O. Box 7988
San Francisco, CA 94120

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 SFDAS 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; review of 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 VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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**

Grantee: Self-Help for the Elderly				Full Term:	7/1/24 - 6/30/28
Program: Adult Day Program				Effective Date:	
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> Check One)				Modification #	
	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
Expenses	Original	Original	Original	Original	Total
Salaries & Benefits	\$315,376	\$317,296	\$317,296	\$317,296	\$1,267,264
Operating-Direct		\$7,541	\$14,037	\$20,664	\$42,242
Subtotal	\$315,376	\$324,837	\$331,333	\$337,960	\$1,309,506
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$47,306	\$48,725	\$49,700	\$50,694	\$196,425
COB Eligible Expenses	\$362,682	\$373,562	\$381,033	\$388,654	\$1,505,931
Consultant/Subcontractor (\$25,000+)					
Direct Client Pass-Through					
Capital Expenses					
Total Expenses	\$362,682	\$373,562	\$381,033	\$388,654	\$1,505,931
HSA / DAS Revenues					
Total HSA / DAS Revenues	\$362,682	\$373,562	\$381,033	\$388,654	\$1,505,931
Grantee/Contractor Revenues					
In-Kind Match	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
Total Grantee/Contractor Revenues	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
Total Revenues	\$387,682	\$398,562	\$406,033	\$413,654	\$1,605,931
Prepared by: Leny Nair					
Telephone No. & Email: 415-677-7682				HSA Budget Form (3/24)	

Salaries & Benefits Detail																					
POSITION TITLE	Agency Totals		HSA Program		7/1/24 - 6/30/25	Agency Totals		HSA Program		7/1/25 - 6/30/26	Agency Totals		HSA Program		7/1/26 - 6/30/27	Agency Totals		HSA Program		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	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total
Physical Therapist	\$115,856	0.65	50%	0.33	\$37,653	\$119,332	0.65	49%	0.32	\$37,653	\$122,912	0.65	47%	0.31	\$37,653	\$126,599	0.65	46%	0.30	\$37,654	\$150,613
Occupational Therapist	\$106,371	0.60	50%	0.30	\$31,911	\$109,562	0.60	49%	0.29	\$31,911	\$111,754	0.60	48%	0.29	\$31,911	\$113,989	0.60	47%	0.28	\$31,912	\$127,645
Registered Nurse	\$92,602	1.00	50%	0.50	\$46,301	\$95,380	1.00	49%	0.49	\$46,301	\$97,287	1.00	48%	0.48	\$46,301	\$99,233	1.00	47%	0.47	\$46,300	\$185,203
Registered Nurse	\$92,602	1.00	50%	0.50	\$46,301	\$95,380	1.00	49%	0.49	\$46,301	\$97,287	1.00	48%	0.48	\$46,301	\$99,233	1.00	47%	0.47	\$46,300	\$185,203
Registered Nurse	\$92,602	0.13	50%	0.07	\$6,019	\$95,380	0.13	49%	0.06	\$6,019	\$97,287	0.13	48%	0.06	\$6,019	\$99,233	0.13	47%	0.06	\$6,019	\$24,076
Speech Therapist	\$180,960	0.04	50%	0.02	\$3,619	\$186,389	0.04	49%	0.02	\$3,619	\$190,117	0.04	48%	0.02	\$3,619	\$193,919	0.04	47%	0.02	\$3,620	\$14,477
Registered Dietitian	\$95,368	0.15	50%	0.08	\$7,153	\$98,229	0.15	49%	0.07	\$7,153	\$100,194	0.15	48%	0.07	\$7,153	\$102,198	0.15	47%	0.07	\$7,152	\$28,611
Program Aide	\$41,600	0.75	100%	0.75	\$31,200	\$42,848	0.75	97%	0.73	\$31,200	\$43,705	0.75	95%	0.71	\$31,200	\$44,579	0.75	93%	0.70	\$31,200	\$124,800
Program Aide	\$41,600	0.75	100%	0.75	\$31,200	\$42,848	0.75	97%	0.73	\$31,200	\$43,705	0.75	95%	0.71	\$31,200	\$44,579	0.75	93%	0.70	\$31,200	\$124,800
Program Aide	\$41,600	0.75	40%	0.30	\$12,480	\$42,848	0.75	39%	0.29	\$12,480	\$43,705	0.75	38%	0.29	\$12,480	\$44,579	0.75	37%	0.28	\$12,480	\$49,920
TOTALS	\$901,160	5.82	590%	3.59	\$253,837	\$928,195	5.82	573%	3.48	\$253,837	\$947,953	5.82	561%	3.41	\$253,837	\$968,141	5.82	550%	3.34	\$253,837	\$1,015,348
FRINGE BENEFIT RATE	25%					25%					25%					25%					
EMPLOYEE FRINGE BENEFITS					\$61,539					\$63,459					\$63,459					\$63,459	\$251,916
TOTAL SALARIES & BENEFITS					\$315,376					\$317,296					\$317,296					\$317,296	\$1,267,264

Grantee: Self-Help for the Elderly
Program: Adult Day Program

Appendix B, Page 3

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/26 - 6/30/27 Original	7/1/27 - 6/30/28 Original	7/1/24 - 6/30/28 Total
Expenditure Category					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Garbage)		\$2,541	\$5,000	\$5,000	\$12,541
Office Supplies, Postage			\$2,000	\$2,000	\$4,000
Building Maintenance Supplies and Repair		\$3,000	\$3,000	\$5,000	\$11,000
Printing and Reproduction					
Insurance		\$2,000	\$4,037	\$8,664	\$14,701
Staff Training					
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
Consultant/Subcontractor (\$25,000 & Under)					
Activity Contractors					
Other					
Software					
Program Supplies					
Senior Outing					
Transportation Services					
Supplies					
Total Operating Expense		\$7,541	\$14,037	\$20,664	\$42,242

HSA Budget Form (3/24)

Appendix F-SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

PROGRAM: ADP, Neighborhood based choirs creative arts ADP program (please select one)

FISCAL YEAR: 07/01/2024- 06/30/2028 for ADP Program

AGENCY: Self Help for the Elderly – Adult Day Services

DIRECTOR: Ziyang (Kelvin) Yu

PHONE No: 415-677-7556

SITES:					
Name of Site	Self-Help for the Elderly Adult Day Services	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Address and Zip	408 22nd Avenue San Francisco, CA 94121	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Phone Number	415-677-7556	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Fax Number	415-666-1899	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Neighborhood	Richmond District	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Muni Line #s	38; 38R; 1; 2	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Person in Charge	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Site Manger	Ziyang (Kelvin) Yu	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Programs Offered at Site	ADP, ADHC, ADCRC	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8:30AM – 5:00PM	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of <u>scheduled</u> programming	9:15AM – 2:30PM	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of service	9:15AM – 2:30PM	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Annual number of units at site	15000	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Average number of units per day	60	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Total number of service days in FY	249	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days closed	116	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
Catholic Charities
July 1, 2024 – June 30, 2028
Alzheimer’s Day Care Resource Center (ADCRC)

I. Purpose

The purpose of this grant is to support the operations of Alzheimer’s Day Care Resource Centers (ADCRCs) at licensed Adult Day Programs (ADPs) or Adult Day Health Care programs (ADHCs). ADCRCs uniquely address psychosocial, mental, functional, and cognitive needs of people with dementia by assisting them to function at their highest level, while providing caregiver support and respite. ADCRCs provide educational, training, and counseling support to families, caregivers, and the community on topics related to Alzheimer’s disease and/or other dementia related disorders.

II. Definitions

ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
Adult Day Health Care (ADHC)	A community-based day health program that offers a medical model of care through an outpatient day program for older persons and adults with chronic medical, cognitive, or mental health conditions and/or disabilities who are at risk of needing institutional care. ADHC facilities are licensed by the California Department of Public Health (CDPH)
Adult Day Program (ADP)	A community-based program providing non-medical care to persons 18 years of age or older in need of personal care services, supervision, or the assistance essential for sustaining the activities of daily living or for the protection of the individual on less than a 24-hour basis. ADP facilities are typically licensed by the California Department of Social Services (CDSS). ADHC facilities, with dual licensure from CDPH, can offer ADP services alongside its ADHC services. ADP is not eligible for Centers for Medicare & Medicaid Services (CMS) reimbursement.
Adult with a Disability	A person 18-59 years of age living with a disability.
Alzheimer's Day Care Resource Center (ADCRC)	A community-based program that serves persons with Alzheimer’s disease or other dementia related disorders, particularly those in the middle to late stages, whose care needs and behavior make it difficult for them to participate in other day programs. The operation of an ADCRC takes place within the framework of a licensed Adult Day Program or Adult Day Health Care.

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, transfer mobility, bathing, toileting, and ambulating 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 Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive 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 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	Catholic Charities
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, gender queer, 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 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, and not to be used as a means test to qualify for the program.
OCM	Office of Contract Management
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior.
SFDAS GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).
UDC	Unduplicated Consumer; A unique consumer receiving services in the Grantee's ADCRC program.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for ADCRC Services

To be eligible for services, clients must be:

- 1) An adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and

- 4) In need of Adult Day Program services and
- 5) Deemed to have Alzheimer's disease or other dementia related disorders, particularly in the middle to late stages. Stages of Alzheimer's are described at: <https://alz.org/alzheimers-dementia/stages>

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an ADP or ADHC program that is in good standing with the State licensing department. A license in good standing requires that a license is active and not expired, suspended, revoked, surrendered, conditioned, or otherwise in a status that in any manner restricts the activity of a licensee under the authority of the license.

Grantee will provide ADCRC programming within the framework of a licensed ADP or ADHC. Grantee will develop a program and maintain a physical environment suitable to care for participants with conditions associated with dementia and provide support and respite for the participant's caregivers. ADCRC programming is comprised of four components: 1) Alzheimer's day care, 2) caregiver support, 3) education and training, and 4) volunteer services.

1) Alzheimer's day care:

- Grantee will offer ADP or ADHC services to eligible participants who require care or supervision in a protective setting for a portion of a 24-hour day. Services typically include socialization and recreational activities, health monitoring, meals and snacks and assistance with ADL.
- Grantee will develop individualized care plans for each participant, considering their unique needs, preferences, and stage of Alzheimer's or related dementia.
- Grantee will provide participants with enriching activities, socialization opportunities, and encourage participant engagement.
- In circumstances wherein in-person engagement is not feasible due to public health orders, the grantee will deliver services through virtual, telephonic, and/or other safe methods of engagement.

2) Caregiver support:

- Grantee will provide supportive counseling assistance for caregivers to enable them to resolve problems and make informed decisions about memory care options. Support may include home visits to provide advice and assistance, and emotional support by phone or in-person
- Grantee will coordinate and conduct support groups to connect participants, caregivers and their families with community resources, support services, and

healthcare professionals specializing in Alzheimer's care for additional assistance and support.

3) Education and training:

- Grantee will plan and conduct education and training sessions to staff, volunteers, caregivers, and the community on topics related to Alzheimer's disease or other dementia related disorders.
- Grantee will offer education and training sessions conducted by experienced staff, subject matter experts, and/or medical/clinical professionals. Training topics will include care issues surrounding Alzheimer's disease and/or other dementia related disorders, common behaviors associated with dementia, communication methods, and how to work with individuals with dementia. Training sessions may also include workshops on caregiving, team building, and client-centered approaches to care and health related issues.

4) Volunteer services:

- Grantee will recruit, screen, train and incorporate volunteers to the care teams within ADCRC programming. The leveraged skills, talents, and compassion of volunteers enhance the quality of care and support of individuals living with Alzheimer's disease and their families.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADCRC services within the fiscal year.

UNIT: One (1) unduplicated consumer

Alzheimer's Day Care–

The units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

Caregiver Support –

The units of service to be reported is the cumulative number of contacts the caregiver support services is provided

UNIT: One (1) contact

Support Group –

The units of service to be reported is the cumulative number of planned and completed support group sessions.

UNIT: One (1) session

Education and Training–

The units of service to be reported is the cumulative number of planned and completed education and training sessions.

UNIT: One (1) session

Volunteers –

A unique individual trained and enlisted as a volunteer to help provide ADCRC services within the fiscal year.

UNIT: One (1) volunteer

Volunteer Time –

The units of service to be reported is the cumulative number of hours of service provided by individual volunteers for the ADCRC.

UNIT: One (1) hour

VIII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

	FY24/25	FY25/26	FY26/27	FY27/28
Unduplicated consumers	30	30	30	30
Alzheimer’s Day Care Hours	12000	12000	12000	12000
Caregiver Support Contacts	350	350	350	350
Support Group Sessions	12	12	12	12
Education and Training Sessions	12	12	12	12
Volunteers	40	40	40	40
Volunteer Time	500	500	500	500

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey with a sample size of at least seventy-five percent (75%) of the unduplicated consumer enrollment at the time the survey is administered by the grantee.

1. Caregivers report that the program helped their care recipients living in the community instead of being institutionalized: Target: 85%
2. Caregivers report a positive impact on their care recipients’ wellness by participating in social and/or physical activities offered in the program. Target: 85%

3. Caregivers report that they are more aware of services for Alzheimer's disease or other dementia related disorders that are available to them and their care recipients as a result of participation in ADCRC services. Target: 85%
4. Caregivers report that they are better able to provide care to their care recipients living with Alzheimer's disease or other dementia related disorders as a result of the education and trainings they receive from the ADCRC. Target: 85%
5. Caregivers report that they are better able to attend to their own personal health and well-being due to the caregiver support they receive from the ADCRC. Target: 85%
6. Caregivers rate the quality of respite services received from the ADCRC as good or excellent. Target: 85%

X. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SFDAS GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the SFDAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
4. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
5. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using a DAS OCP approved intake form, into the SF DAS GetCare database. This will include SOGI data.
8. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
9. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on

an annual basis. The grantee will maintain evidence of staff completion of these trainings.

10. 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.
11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. For assistance with reporting and contract requirements, please contact:

Patrick Garcia
Contracts Manager
Patrick.Garcia@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

Kevin Byrne
Program Analyst
Kevin.P.Byrne@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

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 SFDAS 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; review of 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 VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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**

Grantee: Catholic Charities				Full Term:	7/1/24 - 6/30/28
Program: Alzheimer's Day Care Resource Center				Effective Date:	
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (check One)				Modification #	
	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
Expenses	Original	Original	Original	Original	Total
Salaries & Benefits	\$136,186	\$138,913	\$141,689	\$144,523	\$561,311
Operating-Direct	\$13,059	\$14,810	\$15,108	\$15,410	\$58,387
Subtotal	\$149,245	\$153,723	\$156,797	\$159,933	\$619,698
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$22,387	\$23,058	\$23,520	\$23,990	\$92,955
CODB Eligible Expenses	\$171,632	\$176,781	\$180,317	\$183,923	\$712,653
Consultant/Subcontractor (\$25,000+)					
Direct Client Pass-Through					
Capital Expenses					
Total Expenses	\$171,632	\$176,781	\$180,317	\$183,923	\$712,653
HSA / DAS Revenues					
Total HSA / DAS Revenues	\$171,632	\$176,781	\$180,317	\$183,923	\$712,653
Grantee/Contractor Revenues					
Total Grantee/Contractor Revenues					
Total Revenues	\$171,632	\$176,781	\$180,317	\$183,923	\$712,653
Prepared by:					
<i>Telephone No. & Email:</i>				<i>HSA Budget Form (3/24)</i>	

Salaries & Benefits Detail																										
POSITION TITLE	Agency Totals		HSA Program		7/1/24 - 6/30/25		Agency Totals		HSA Program		7/1/25 - 6/30/26		Agency Totals		HSA Program		7/1/26 - 6/30/27		Agency Totals		HSA Program		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	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total
Director of Client Services	\$165,764	0.20	50%	0.10	\$16,576	\$169,079	0.20	50%	0.10	\$16,908	\$172,461	0.20	50%	0.10	\$17,246	\$175,910	0.20	50%	0.10	\$17,591	\$175,910	0.20	50%	0.10	\$17,591	\$68,321
Program Director	\$84,457	1.00	25%	0.25	\$21,114	\$86,146	1.00	25%	0.25	\$21,537	\$87,869	1.00	25%	0.25	\$21,967	\$89,627	1.00	25%	0.25	\$22,407	\$89,627	1.00	25%	0.25	\$22,407	\$87,025
Activity/Volunteer Coordinator	\$57,710	1.00	40%	0.40	\$23,084	\$58,864	1.00	40%	0.40	\$23,546	\$60,042	1.00	40%	0.40	\$24,017	\$61,242	1.00	40%	0.40	\$24,497	\$61,242	1.00	40%	0.40	\$24,497	\$95,144
Prog/Activity Asst- #1	\$51,154	1.00	43%	0.43	\$21,740	\$52,177	1.00	43%	0.43	\$22,175	\$53,220	1.00	43%	0.43	\$22,619	\$54,285	1.00	43%	0.43	\$23,071	\$54,285	1.00	43%	0.43	\$23,071	\$89,605
Prog/Activity Asst- #2 (Food Serv)	\$48,340	0.85	29%	0.24	\$11,710	\$49,307	0.85	29%	0.24	\$11,945	\$50,293	0.85	29%	0.24	\$12,183	\$51,299	0.85	29%	0.24	\$12,427	\$51,299	0.85	29%	0.24	\$12,427	\$48,265
Senior Program Admin	\$85,207	0.35	30%	0.11	\$8,947	\$86,911	0.35	30%	0.11	\$9,126	\$88,649	0.35	30%	0.11	\$9,308	\$90,422	0.35	30%	0.11	\$9,494	\$90,422	0.35	30%	0.11	\$9,494	\$36,875
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TOTALS	\$492,632	4.40	2.16	1.52	\$103,171	\$502,484	4.40	2.16%	1.52	\$105,237	\$512,534	4.40	2.16%	1.52	\$107,340	\$522,785	4.40	2.16%	1.52	\$109,487	\$522,785	4.40	2.16%	1.52	\$109,487	\$425,235
FRINGE BENEFIT RATE	32%							32%					32%					32%						32%		
EMPLOYEE FRINGE BENEFITS					\$33,015					\$33,676					\$34,349										\$35,036	\$136,076
TOTAL SALARIES & BENEFITS					\$136,186					\$138,913					\$141,689										\$144,523	\$561,311

HSA Budget Form (3/24)

Grantee: Catholic Charities
Program: Alzheimer's Day Care Resource Center

Appendix B, Page 3

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/26 - 6/30/27 Original	7/1/27 - 6/30/28 Original	7/1/24 - 6/30/28 Total
Expenditure Category					
Rental of Property	\$10,607	\$12,235	\$12,404	\$12,571	\$47,817
Utilities(Elec, Water, Gas, Phone, Garbage)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance	\$2,452	\$2,575	\$2,704	\$2,839	\$10,570
Staff Training					
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
Consultant/Subcontractor (\$25,000 & Under)					
Other					
Total Operating Expense	\$13,059	\$14,810	\$15,108	\$15,410	\$58,387

HSA Budget Form (3/24)

SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

PROGRAM: Alzheimer’s Day Care Resource Center (ADCRC)

FISCAL YEAR: 07/01/2024 - 06/30/2028

AGENCY: Catholic Charities San Francisco

DIRECTOR: Kelly Phelps

PHONE No: 415-452-3500

SITES:					
Name of Site	Catholic Charities San Francisco				
Address and Zip	50 Broad Street San Francisco, CA 94112				
Phone Number	415-452-3500				
Fax Number	415-452-3505				
Neighborhood	City of San Francisco District 11				
Muni Line #s	“M” and Bus 54				
Person in Charge	Patty Clement-Cihak				
Site Manger	Kelly Phelps				
Programs Offered at Site	ADCRC Scheduled Activities				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun				
Hours Open	8:00 AM – 5:00 PM				
Hours of <u>scheduled</u> programming	9:30 AM – 3:00 PM				
Hours of service	8:00 AM – 5:00 PM				
Annual number of units at site	12000				
Average number of units per day	67				
Total number of service days in FY	246				
Days closed	New Year’s Day/Martin Luther King Day/President’s Day/2 Staff Training Days/Good Friday/Memorial Day/Juneteenth/Labor Day/Thanksgiving Day/Black Friday/Christmas Eve/Christmas Day				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
 Institute on Aging
 July 1, 2024 – June 30, 2028
 Alzheimer’s Day Care Resource Center (ADCRC)

I. Purpose

The purpose of this grant is to support the operations of Alzheimer’s Day Care Resource Centers (ADCRCs) at licensed Adult Day Programs (ADPs) or Adult Day Health Care programs (ADHCs). ADCRCs uniquely address psychosocial, mental, functional, and cognitive needs of people with dementia by assisting them to function at their highest level, while providing caregiver support and respite. ADCRCs provide educational, training, and counseling support to families, caregivers, and the community on topics related to Alzheimer’s disease and/or other dementia related disorders.

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Communities of Color	An inclusive 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 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	Institute on Aging
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, gender queer, 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 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, and not to be used as a means test to qualify for the program.
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UDC	Unduplicated Consumer; A unique consumer receiving services in the Grantee's ADCRC program.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for ADCRC Services

To be eligible for services, clients must be:

- 1) An adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and

- 4) In need of Adult Day Program services and
- 5) Deemed to have Alzheimer's disease or other dementia related disorders, particularly in the middle to late stages. Stages of Alzheimer's are described at: <https://alz.org/alzheimers-dementia/stages>

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VI. Description of Services

Grantee will operate an ADP or ADHC program that is in good standing with the State licensing department. A license in good standing requires that a license is active and not expired, suspended, revoked, surrendered, conditioned, or otherwise in a status that in any manner restricts the activity of a licensee under the authority of the license.

Grantee will provide ADCRC programming within the framework of a licensed ADP or ADHC. Grantee will develop a program and maintain a physical environment suitable to care for participants with conditions associated with dementia and provide support and respite for the participant's caregivers. ADCRC programming is comprised of four components: 1) Alzheimer's day care, 2) caregiver support, 3) education and training, and 4) volunteer services.

1) Alzheimer's day care:

- Grantee will offer ADP or ADHC services to eligible participants who require care or supervision in a protective setting for a portion of a 24-hour day. Services typically include socialization and recreational activities, health monitoring, meals and snacks and assistance with ADL.
- Grantee will develop individualized care plans for each participant, considering their unique needs, preferences, and stage of Alzheimer's or related dementia.
- Grantee will provide participants with enriching activities, socialization opportunities, and encourage participant engagement.
- In circumstances wherein in-person engagement is not feasible due to public health orders, the grantee will deliver services through virtual, telephonic, and/or other safe methods of engagement.

2) Caregiver support:

- Grantee will provide supportive counseling assistance for caregivers to enable them to resolve problems and make informed decisions about memory care options. Support may include home visits to provide advice and assistance, and emotional support by phone or in-person
- Grantee will coordinate and conduct support groups to connect participants, caregivers and their families with community resources, support services, and

healthcare professionals specializing in Alzheimer's care for additional assistance and support.

3) Education and training:

- Grantee will plan and conduct education and training sessions to staff, volunteers, caregivers, and the community on topics related to Alzheimer's disease or other dementia related disorders.
- Grantee will offer education and training sessions conducted by experienced staff, subject matter experts, and/or medical/clinical professionals. Training topics will include care issues surrounding Alzheimer's disease and/or other dementia related disorders, common behaviors associated with dementia, communication methods, and how to work with individuals with dementia. Training sessions may also include workshops on caregiving, team building, and client-centered approaches to care and health related issues.

4) Volunteer services:

- Grantee will recruit, screen, train and incorporate volunteers to the care teams within ADCRC programming. The leveraged skills, talents, and compassion of volunteers enhance the quality of care and support of individuals living with Alzheimer's disease and their families.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADCRC services within the fiscal year.

UNIT: One (1) unduplicated consumer

Alzheimer's Day Care–

The units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

Caregiver Support –

The units of service to be reported is the cumulative number of contacts the caregiver support services is provided

UNIT: One (1) contact

Support Group –

The units of service to be reported is the cumulative number of planned and completed support group sessions.

UNIT: One (1) session

Education and Training–

The units of service to be reported is the cumulative number of planned and completed education and training sessions.

UNIT: One (1) session

Volunteers –

A unique individual trained and enlisted as a volunteer to help provide ADCRC services within the fiscal year.

UNIT: One (1) volunteer

Volunteer Time –

The units of service to be reported is the cumulative number of hours of service provided by individual volunteers for the ADCRC.

UNIT: One (1) hour

VIII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

	FY24/25	FY25/26	FY26/27	FY27/28
Unduplicated consumers	33	33	33	33
Alzheimer’s Day Care Hours	12350	12350	12350	12350
Caregiver Support Contacts	400	400	400	400
Support Group Sessions	12	12	12	12
Education and Training Sessions	6	6	6	6
Volunteers	50	50	50	50
Volunteer Time	700	700	700	700

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey with a sample size of at least seventy-five percent (75%) of the unduplicated consumer enrollment at the time the survey is administered by the grantee.

1. Caregivers report that the program helped their care recipients living in the community instead of being institutionalized: Target: 85%
2. Caregivers report a positive impact on their care recipients’ wellness by participating in social and/or physical activities offered in the program. Target: 85%
3. Caregivers report that they are more aware of services for Alzheimer’s disease or other dementia related disorders that are available to them and their care recipients as a result of participation in ADCRC services. Target: 85%

4. Caregivers report that they are better able to provide care to their care recipients living with Alzheimer's disease or other dementia related disorders as a result of the education and trainings they receive from the ADCRC. Target: 85%
5. Caregivers report that they are better able to attend to their own personal health and well-being due to the caregiver support they receive from the ADCRC. Target: 85%
6. Caregivers rate the quality of respite services received from the ADCRC as good or excellent. Target: 85%

X. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SFDAS GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the SFDAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
4. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
5. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using a DAS OCP approved intake form, into the SF DAS GetCare database. This will include SOGI data.
8. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
9. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.

10. 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.
11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. For assistance with reporting and contract requirements, please contact:

Tara Alvarez Contracts Manager P.O. Box 7988 San Francisco, CA 94120 Tara Alvarez@sfgov.org	Sarah Chan Program Analyst P.O. Box 7988 San Francisco, CA 94120 Sarah.Chan@sfgov.org
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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 SFDAS 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; review of 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 VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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**

Grantee/Contractor: Institute on Aging					7/1/24 - 6/30/28
Program: ADCRC					
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> Check One)					
	FY24-25	FY25-26	FY26-27	FY27-28	7/1/24 - 6/30/28
Expenses	Original	Original	Original	Original	Total
Salaries & Benefits	\$ 120,420	\$ 124,033	\$ 126,514	\$ 129,044	\$ 500,011
Operating-Direct	\$ 13,670	\$ 14,080	\$ 14,362	\$ 14,649	\$ 56,761
Subtotal	\$ 134,090	\$ 138,113	\$ 140,876	\$ 143,693	\$ 556,772
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$ 20,114	\$ 20,717	\$ 21,131	\$ 21,554	\$ 83,516
CODB Eligible Expenses	\$ 154,204	\$ 158,830	\$ 162,007	\$ 165,247	\$ 640,288
Total Expenses	\$ 154,204	\$ 158,830	\$ 162,007	\$ 165,247	\$ 640,288
HSA / DAS Revenues					
Total HSA / DAS Revenues	\$ 154,204	\$ 158,830	\$ 162,007	\$ 165,247	\$ 640,288
Grantee/Contractor Revenues					
					\$ -
					\$ -
					\$ -
					\$ -
Total Grantee/Contractor Revenues	\$ -	\$ -	\$ -	\$ -	\$ -
Total Revenues	\$ 154,204	\$ 158,830	\$ 162,007	\$ 165,247	\$ 640,288
Prepared by: Jade Luo					
Telephone No. & Email: 415.750.4151, jluo@joaging.org					HSA Budget Form (3/24)

Grantee/Contractor: Institute on Aging Program: ADCR																			Appendix B, Page 2							
Salaries & Benefits Detail																										
POSITION TITLE	Agency Totals		HSA Program		FY24-25		Agency Totals		HSA Program		FY25-26		Agency Totals		HSA Program		FY26-27		Agency Totals		HSA Program		FY27-28		7/1/24 - 6/30/28	
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total
Manager, Enrichment Center Program	\$113,300	1.00	50%	0.50	\$56,650	\$116,699	1.00	50%	0.50	\$58,350	\$119,033	1.00	50%	0.50	\$59,517	\$121,414	1.00	50%	0.50	\$60,707	\$235,224					
Program Coordinator, Senior	\$64,401	1.00	40%	0.40	\$25,760	\$66,333	1.00	40%	0.40	\$26,533	\$67,660	1.00	40%	0.40	\$27,064	\$69,013	1.00	40%	0.40	\$27,605	\$106,962					
Engagement Coordinator	\$69,628	1.00	20%	0.20	\$13,926	\$71,717	1.00	20%	0.20	\$14,343	\$73,151	1.00	20%	0.20	\$14,630	\$74,614	1.00	20%	0.20	\$14,923	\$57,822					
				-					-					-					-							
				-					-					-					-							
				-					-					-					-							
				-					-					-					-							
				-					-					-					-							
				-					-					-					-							
TOTALS	\$247,329	3.00	1.10	1.10	\$96,336	\$254,749	3.00	110%	1.10	\$99,226				\$101,211						\$103,235	\$400,008					
FRINGE BENEFIT RATE	25%					25%				25%					25%											
EMPLOYEE FRINGE BENEFITS					\$24,084					\$24,807					\$25,303						\$25,809	\$100,003				
TOTAL SALARIES & BENEFITS					\$120,420					\$124,033					\$126,514						\$129,044	\$500,011				

HSA Budget Form (3/24)

Grantee/Contractor: Institute on Aging
 Program: ADCR

Appendix B, Page 3

Operating Expenses Detail

FY24-25 Original	FY25-26 Original	FY26-27 Original	FY27-28 Original	7/1/24 - 6/30/28 Total
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Expenditure Category

Rental of Property
 Utilities(Elec, Water, Gas, Phone, Garbage)
 Office Supplies, Postage
 Building Maintenance Supplies and Repair
 Printing and Reproduction
 Insurance
 Staff Training
 Staff Travel-(Local & Out of Town)
 Rental of Equipment

\$500	\$500	\$500	\$500	\$2,000
\$350	\$350	\$350	\$350	\$1,400

Consultant/Subcontractor (\$25,000 & Under)

Consultant A
 Subcontractor A

Other

Licenses and Fees
 Food Supplies
 Client Transportation
 Program Supplies

\$500	\$500	\$500	\$500	\$2,000
\$7,000	\$7,000	\$7,000	\$7,000	\$28,000
\$4,820	\$5,230	\$5,512	\$5,799	\$21,361
\$500	\$500	\$500	\$500	\$2,000

Total Operating Expense

\$13,670	\$14,080	\$14,362	\$14,649	\$56,761
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HSA Budget Form (3/24)

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

PROGRAM: ADCRC

FISCAL YEAR: 07/01/2024 - 06/30/2028 for ADCRC

AGENCY: Institute on Aging

DIRECTOR: J. Thomas Briody

PHONE No: (415) 728-9260

SITES:					
Name of Site	The Enrichment Center	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Address and Zip	386 Moraga Ave	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Phone Number	(415) 728-9260	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Fax Number	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Neighborhood	Presidio	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Muni Line #s	PresidGo, 43 Muni	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Person in Charge	Stephanie Schmutz	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Site Manager	Clara Allen	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Programs Offered at Site	ADP, ADCRC, Companioa	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9am-3pm; extended hours as needed as staff are on site 8am-5pm	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of <u>scheduled</u> programming	9am-3pm	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of service	12,350	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Annual number of units at site	33 clients	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Average number of units per day	31 clients	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Total number of service days in FY	252	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days closed	New Year's Day, Martin Luther King Jr. Day, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, The day after Thanksgiving Day, Christmas Day	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
 Self-Help for the Elderly
 July 1, 2024 – June 30, 2028
 Alzheimer’s Day Care Resource Center (ADCRC)

I. Purpose

The purpose of this grant is to support the operations of Alzheimer’s Day Care Resource Centers (ADCRCs) at licensed Adult Day Programs (ADPs) or Adult Day Health Care programs (ADHCs). ADCRCs uniquely address psychosocial, mental, functional, and cognitive needs of people with dementia by assisting them to function at their highest level, while providing caregiver support and respite. ADCRCs provide educational, training, and counseling support to families, caregivers, and the community on topics related to Alzheimer’s disease and/or other dementia related disorders.

II. Definitions

ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
Adult Day Health Care (ADHC)	A community-based day health program that offers a medical model of care through an outpatient day program for older persons and adults with chronic medical, cognitive, or mental health conditions and/or disabilities who are at risk of needing institutional care. ADHC facilities are licensed by the California Department of Public Health (CDPH)
Adult Day Program (ADP)	A community-based program providing non-medical care to persons 18 years of age or older in need of personal care services, supervision, or the assistance essential for sustaining the activities of daily living or for the protection of the individual on less than a 24-hour basis. ADP facilities are typically licensed by the California Department of Social Services (CDSS). ADHC facilities, with dual licensure from CDPH, can offer ADP services alongside its ADHC services. ADP is not eligible for Centers for Medicare & Medicaid Services (CMS) reimbursement.
Adult with a Disability	A person 18-59 years of age living with a disability.
Alzheimer's Day Care Resource Center (ADCRC)	A community-based program that serves persons with Alzheimer’s disease or other dementia related disorders, particularly those in the middle to late stages, whose care needs and behavior make it difficult for them to participate in other day programs. The operation of an ADCRC takes place within the framework of a licensed Adult Day Program or Adult Day Health Care.

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, transfer mobility, bathing, toileting, and ambulating 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 Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive 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 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	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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, gender queer, 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 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, and not to be used as a means test to qualify for the program.
OCM	Office of Contract Management
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior.
SFDAS GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).
UDC	Unduplicated Consumer; A unique consumer receiving services in the Grantee's ADCRC program.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for ADCRC Services

To be eligible for services, clients must be:

- 1) An adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and

- 4) In need of Adult Day Program services and
- 5) Deemed to have Alzheimer's disease or other dementia related disorders, particularly in the middle to late stages. Stages of Alzheimer's are described at: <https://alz.org/alzheimers-dementia/stages>

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an ADP or ADHC program that is in good standing with the State licensing department. A license in good standing requires that a license is active and not expired, suspended, revoked, surrendered, conditioned, or otherwise in a status that in any manner restricts the activity of a licensee under the authority of the license.

Grantee will provide ADCRC programming within the framework of a licensed ADP or ADHC. Grantee will develop a program and maintain a physical environment suitable to care for participants with conditions associated with dementia and provide support and respite for the participant's caregivers. ADCRC programming is comprised of four components: 1) Alzheimer's day care, 2) caregiver support, 3) education and training, and 4) volunteer services.

1) Alzheimer's day care:

- Grantee will offer ADP or ADHC services to eligible participants who require care or supervision in a protective setting for a portion of a 24-hour day. Services typically include socialization and recreational activities, health monitoring, meals and snacks and assistance with ADL.
- Grantee will develop individualized care plans for each participant, considering their unique needs, preferences, and stage of Alzheimer's or related dementia.
- Grantee will provide participants with enriching activities, socialization opportunities, and encourage participant engagement.
- In circumstances wherein in-person engagement is not feasible due to public health orders, the grantee will deliver services through virtual, telephonic, and/or other safe methods of engagement.

2) Caregiver support:

- Grantee will provide supportive counseling assistance for caregivers to enable them to resolve problems and make informed decisions about memory care options. Support may include home visits to provide advice and assistance, and emotional support by phone or in-person
- Grantee will coordinate and conduct support groups to connect participants, caregivers and their families with community resources, support services, and

healthcare professionals specializing in Alzheimer's care for additional assistance and support.

3) Education and training:

- Grantee will plan and conduct education and training sessions to staff, volunteers, caregivers, and the community on topics related to Alzheimer's disease or other dementia related disorders.
- Grantee will offer education and training sessions conducted by experienced staff, subject matter experts, and/or medical/clinical professionals. Training topics will include care issues surrounding Alzheimer's disease and/or other dementia related disorders, common behaviors associated with dementia, communication methods, and how to work with individuals with dementia. Training sessions may also include workshops on caregiving, team building, and client-centered approaches to care and health related issues.

4) Volunteer services:

- Grantee will recruit, screen, train and incorporate volunteers to the care teams within ADCRC programming. The leveraged skills, talents, and compassion of volunteers enhance the quality of care and support of individuals living with Alzheimer's disease and their families.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADCRC services within the fiscal year.

UNIT: One (1) unduplicated consumer

Alzheimer's Day Care–

The units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

Caregiver Support –

The units of service to be reported is the cumulative number of contacts the caregiver support services is provided

UNIT: One (1) contact

Support Group –

The units of service to be reported is the cumulative number of planned and completed support group sessions.

UNIT: One (1) session

Education and Training–

The units of service to be reported is the cumulative number of planned and completed education and training sessions.

UNIT: One (1) session

Volunteers –

A unique individual trained and enlisted as a volunteer to help provide ADCRC services within the fiscal year.

UNIT: One (1) volunteer

Volunteer Time –

The units of service to be reported is the cumulative number of hours of service provided by individual volunteers for the ADCRC.

UNIT: One (1) hour

VIII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

	FY24/25	FY25/26	FY26/27	FY27/28
Unduplicated consumers	32	32	32	32
Alzheimer’s Day Care Hours	16000	16000	16000	16000
Caregiver Support Contacts	60	60	60	60
Support Group Sessions	12	12	12	12
Education and Training Sessions	8	8	8	8
Volunteers	100	100	100	100
Volunteer Time	800	800	800	800

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey with a sample size of at least seventy-five percent (75%) of the unduplicated consumer enrollment at the time the survey is administered by the grantee.

1. Caregivers report that the program helped their care recipients living in the community instead of being institutionalized: Target: 85%
2. Caregivers report a positive impact on their care recipients’ wellness by participating in social and/or physical activities offered in the program. Target: 85%

3. Caregivers report that they are more aware of services for Alzheimer’s disease or other dementia related disorders that are available to them and their care recipients as a result of participation in ADCRC services. Target: 85%
4. Caregivers report that they are better able to provide care to their care recipients living with Alzheimer’s disease or other dementia related disorders as a result of the education and trainings they receive from the ADCRC. Target: 85%
5. Caregivers report that they are better able to attend to their own personal health and well-being due to the caregiver support they receive from the ADCRC. Target: 85%
6. Caregivers rate the quality of respite services received from the ADCRC as good or excellent. Target: 85%

X. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SFDAS GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the SFDAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
4. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
5. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using a DAS OCP approved intake form, into the SF DAS GetCare database. This will include SOGI data.
8. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
9. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on

an annual basis. The grantee will maintain evidence of staff completion of these trainings.

10. 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.
11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. For assistance with reporting and contract requirements, please contact:

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

Kevin Byrne
Program Analyst
Kevin.P.Byrne@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

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 SFDAS 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; review of 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 VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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**

Grantee: Self-Help for the Elderly				Full Term:	7/1/24 - 6/30/28
Program: Alzheimer's Day Care Resource Center				Effective Date:	
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> Check One) <input type="checkbox"/>				Modification #	
	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
Expenses	Original	Original	Original	Original	Total
Salaries & Benefits	\$126,371	\$126,371	\$126,371	\$126,371	\$505,484
Operating-Direct	\$3,199	\$7,086	\$9,755	\$12,477	\$32,517
Subtotal	\$129,570	\$133,457	\$136,126	\$138,848	\$538,001
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$19,435	\$20,018	\$20,419	\$20,827	\$80,699
COB Eligible Expenses	\$149,005	\$153,475	\$156,545	\$159,675	\$618,700
Consultant/Subcontractor (\$25,000+)					
Direct Client Pass-Through					
Capital Expenses					
Total Expenses	\$149,005	\$153,475	\$156,545	\$159,675	\$618,700
HSA / DAS Revenues					
Total HSA / DAS Revenues	\$149,005	\$153,475	\$156,545	\$159,675	\$618,700
Grantee/Contractor Revenues					
In-Kind Match	\$15,000	\$15,000	\$15,000	\$15,000	\$60,000
Total Grantee/Contractor Revenues	\$15,000	\$15,000	\$15,000	\$15,000	\$60,000
Total Revenues	\$164,005	\$168,475	\$171,545	\$174,675	\$678,700
Prepared by: Leny Nair					
Telephone No. & Email: 415-677-7682				HSA Budget Form (3/24)	

Grantee: Self-Help for the Elderly Program: Alzheimer's Day Care Resource Center																						Appendix B, Page 2				
Salaries & Benefits Detail																										
POSITION TITLE	Agency Totals		HSA Program		7/1/24 - 6/30/25		Agency Totals		HSA Program		7/1/25 - 6/30/26		Agency Totals		HSA Program		7/1/26 - 6/30/27		Agency Totals		HSA Program		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	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total
Program Aide	\$41,600	0.75	100%	0.75	\$31,200	\$42,848	0.75	97%	0.73	\$31,200	\$43,705	0.75	95%	0.71	\$31,200	\$44,579	0.75	93%	0.70	\$31,200	\$44,579	0.75	93%	0.70	\$31,200	\$124,800
Program Aide	\$41,600	0.75	100%	0.75	\$31,200	\$42,848	0.75	97%	0.73	\$31,200	\$43,705	0.75	95%	0.71	\$31,200	\$44,579	0.75	93%	0.70	\$31,200	\$44,579	0.75	93%	0.70	\$31,200	\$124,800
Program Aide	\$41,600	0.75	100%	0.75	\$31,200	\$42,848	0.75	97%	0.73	\$31,200	\$43,705	0.75	95%	0.71	\$31,200	\$44,579	0.75	93%	0.70	\$31,200	\$44,579	0.75	93%	0.70	\$31,200	\$124,800
Care Coordinator	\$53,768	1.00	17%	0.17	\$9,141	\$55,381	1.00	17%	0.17	\$9,141	\$56,489	1.00	16%	0.16	\$9,141	\$57,619	1.00	16%	0.16	\$9,141	\$57,619	1.00	16%	0.16	\$9,141	\$36,564
TOTALS	\$178,568	3.25	317%	2.42	\$102,741	\$183,925	3.25	308%	2.35	\$102,741	\$187,604	3.25	302%	2.30	\$102,741	\$191,356	3.25	296%	2.26	\$102,741	\$191,356	3.25	296%	2.26	\$102,741	\$410,964
FRINGE BENEFIT RATE	23%																									
EMPLOYEE FRINGE BENEFITS					\$23,630					\$23,630					\$23,630										\$23,630	\$94,520
TOTAL SALARIES & BENEFITS					\$126,371					\$126,371					\$126,371										\$126,371	\$505,484

HSA Budget Form (3/24)

Grantee: Self-Help for the Elderly Appendix B, Page 3					
Program: Alzheimer's Day Care Resource Center					
Operating Expenses Detail					
	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/26 - 6/30/27 Original	7/1/27 - 6/30/28 Original	7/1/24 - 6/30/28 Total
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Garbage)	\$3,199	\$3,511	\$4,501	\$4,492	\$15,703
Office Supplies, Postage					
Building Maintenance Supplies and Repair		\$3,575	\$3,575	\$3,575	\$10,725
Printing and Reproduction					
Insurance			\$1,679	\$4,410	\$6,089
Staff Training					
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
<u>Consultant/Subcontractor (\$25,000 & Under)</u>					
Activity Contractors					
<u>Other</u>					
Software					
Program Supplies					
Senior Outing					
Transportation Services					
Supplies					
<u>Total Operating Expense</u>	\$3,199	\$7,086	\$9,755	\$12,477	\$32,517

HSA Budget Form (3/24)

Appendix F-SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

PROGRAM: ADCRC , Neighborhood based choirs creative arts ADCRC Program (please select one)

FISCAL YEAR: 07/01/2024- 06/30/2028 for ADCRC Program

AGENCY: Self Help for the Elderly – Adult Day Services

DIRECTOR: Ziyang (Kelvin) Yu

PHONE No: 415-677-7556

SITES:					
Name of Site	Self-Help for the Elderly Adult Day Services	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Address and Zip	408 22nd Avenue San Francisco, CA 94121	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Phone Number	415-677-7556	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Fax Number	415-666-1899	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Neighborhood	Richmond District	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Muni Line #s	38; 38R; 1; 2	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Person in Charge	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Site Manger	Ziyang (Kelvin) Yu	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Programs Offered at Site	ADCRC, ADHC, ADP	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8:30AM – 5:00PM	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of <u>scheduled</u> programming	9:15AM – 2:30PM	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Hours of service	9:15AM – 2:30PM	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Annual number of units at site	16000	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Average number of units per day	64	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Total number of service days in FY	249	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Days closed	116	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
 North and South of Market Adult Day Health Corporation dba SteppingStone
 July 1, 2024 – June 30, 2028
 Alzheimer’s Day Care Resource Center (ADCRC)

I. Purpose

The purpose of this grant is to support the operations of Alzheimer’s Day Care Resource Centers (ADCRCs) at licensed Adult Day Programs (ADPs) or Adult Day Health Care programs (ADHCs). ADCRCs uniquely address psychosocial, mental, functional, and cognitive needs of people with dementia by assisting them to function at their highest level, while providing caregiver support and respite. ADCRCs provide educational, training, and counseling support to families, caregivers, and the community on topics related to Alzheimer’s disease and/or other dementia related disorders.

II. Definitions

ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
Adult Day Health Care (ADHC)	A community-based day health program that offers a medical model of care through an outpatient day program for older persons and adults with chronic medical, cognitive, or mental health conditions and/or disabilities who are at risk of needing institutional care. ADHC facilities are licensed by the California Department of Public Health (CDPH)
Adult Day Program (ADP)	A community-based program providing non-medical care to persons 18 years of age or older in need of personal care services, supervision, or the assistance essential for sustaining the activities of daily living or for the protection of the individual on less than a 24-hour basis. ADP facilities are typically licensed by the California Department of Social Services (CDSS). ADHC facilities, with dual licensure from CDPH, can offer ADP services alongside its ADHC services. ADP is not eligible for Centers for Medicare & Medicaid Services (CMS) reimbursement.
Adult with a Disability	A person 18-59 years of age living with a disability.
Alzheimer's Day Care Resource Center (ADCRC)	A community-based program that serves persons with Alzheimer’s disease or other dementia related disorders, particularly those in the middle to late stages, whose care needs and behavior make it difficult for them to participate in other day programs. The operation of an ADCRC takes place within the framework of a licensed Adult Day Program or Adult Day Health Care.

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, transfer mobility, bathing, toileting, and ambulating 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 Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive 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 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	North and South of Market Adult Day Health Corporation dba SteppingStone
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, gender queer, 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 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, and not to be used as a means test to qualify for the program.
OCM	Office of Contract Management
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior.
SFDAS GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).
UDC	Unduplicated Consumer; A unique consumer receiving services in the Grantee's ADCRC program.

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:

- 1) Persons with low income
- 2) Persons who are socially isolated
- 3) Persons with limited English-speaking proficiency
- 4) Persons from communities of color
- 5) Persons who identify as LGBTQ+
- 6) Persons at risk of institutionalization

IV. Eligibility for ADCRC Services

To be eligible for services, clients must be:

- 1) An adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and

- 3) A resident of San Francisco and
- 4) In need of Adult Day Program services and
- 5) Deemed to have Alzheimer's disease or other dementia related disorders, particularly in the middle to late stages. Stages of Alzheimer's are described at: <https://alz.org/alzheimers-dementia/stages>

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an ADP or ADHC program that is in good standing with the State licensing department. A license in good standing requires that a license is active and not expired, suspended, revoked, surrendered, conditioned, or otherwise in a status that in any manner restricts the activity of a licensee under the authority of the license.

Grantee will provide ADCRC programming within the framework of a licensed ADP or ADHC. Grantee will develop a program and maintain a physical environment suitable to care for participants with conditions associated with dementia and provide support and respite for the participant's caregivers. ADCRC programming is comprised of four components: 1) Alzheimer's day care, 2) caregiver support, 3) education and training, and 4) volunteer services.

1) Alzheimer's day care:

- Grantee will offer ADP or ADHC services to eligible participants who require care or supervision in a protective setting for a portion of a 24-hour day. Services typically include socialization and recreational activities, health monitoring, meals and snacks and assistance with ADL.
- Grantee will develop individualized care plans for each participant, considering their unique needs, preferences, and stage of Alzheimer's or related dementia.
- Grantee will provide participants with enriching activities, socialization opportunities, and encourage participant engagement.
- In circumstances wherein in-person engagement is not feasible due to public health orders, the grantee will deliver services through virtual, telephonic, and/or other safe methods of engagement.

2) Caregiver support:

- Grantee will provide supportive counseling assistance for caregivers to enable them to resolve problems and make informed decisions about memory care options. Support may include home visits to provide advice and assistance, and emotional support by phone or in-person
- Grantee will coordinate and conduct support groups to connect participants, caregivers and their families with community resources, support services, and

healthcare professionals specializing in Alzheimer's care for additional assistance and support.

3) Education and training:

- Grantee will plan and conduct education and training sessions to staff, volunteers, caregivers, and the community on topics related to Alzheimer's disease or other dementia related disorders.
- Grantee will offer education and training sessions conducted by experienced staff, subject matter experts, and/or medical/clinical professionals. Training topics will include care issues surrounding Alzheimer's disease and/or other dementia related disorders, common behaviors associated with dementia, communication methods, and how to work with individuals with dementia. Training sessions may also include workshops on caregiving, team building, and client-centered approaches to care and health related issues.

4) Volunteer services:

- Grantee will recruit, screen, train and incorporate volunteers to the care teams within ADCRC programming. The leveraged skills, talents, and compassion of volunteers enhance the quality of care and support of individuals living with Alzheimer's disease and their families.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADCRC services within the fiscal year.

UNIT: One (1) unduplicated consumer

Alzheimer's Day Care–

The units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

Caregiver Support –

The units of service to be reported is the cumulative number of contacts the caregiver support services is provided

UNIT: One (1) contact

Support Group –

The units of service to be reported is the cumulative number of planned and completed support group sessions.

UNIT: One (1) session

Education and Training–

The units of service to be reported is the cumulative number of planned and completed education and training sessions.

UNIT: One (1) session

Volunteers –

A unique individual trained and enlisted as a volunteer to help provide ADCRC services within the fiscal year.

UNIT: One (1) volunteer

Volunteer Time –

The units of service to be reported is the cumulative number of hours of service provided by individual volunteers for the ADCRC.

UNIT: One (1) hour

VIII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

	FY24/25	FY25/26	FY26/27	FY27/28
Unduplicated consumers	22	22	22	22
Alzheimer’s Day Care Hours	15000	15000	15000	15000
Caregiver Support Contacts	280	280	280	280
Support Group Sessions	12	12	12	12
Education and Training Sessions	6	6	6	6
Volunteers	20	20	20	20
Volunteer Time	500	500	500	500

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey with a sample size of at least seventy-five percent (75%) of the unduplicated consumer enrollment at the time the survey is administered by the grantee.

1. Caregivers report that the program helped their care recipients living in the community instead of being institutionalized: Target: 85%
2. Caregivers report a positive impact on their care recipients’ wellness by participating in social and/or physical activities offered in the program. Target: 85%
3. Caregivers report that they are more aware of services for Alzheimer’s disease or other dementia related disorders that are available to them and their care recipients as a result of participation in ADCRC services. Target: 85%

4. Caregivers report that they are better able to provide care to their care recipients living with Alzheimer's disease or other dementia related disorders as a result of the education and trainings they receive from the ADCRC. Target: 85%
5. Caregivers report that they are better able to attend to their own personal health and well-being due to the caregiver support they receive from the ADCRC. Target: 85%
6. Caregivers rate the quality of respite services received from the ADCRC as good or excellent. Target: 85%

X. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the SFDAS GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the SFDAS GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
4. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
5. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
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10. 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.
11. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
12. For assistance with reporting and contract requirements, please contact

Patrick Garcia
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P.O. Box 7988
San Francisco, CA 94120
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Sarah Chan
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P.O. Box 7988
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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 SFDAS 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; review of 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 VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 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**

Grantee: SteppingStone				Full Term:	7/1/24 - 6/30/28
Program: Alzheimer's Day Care Resource Center				Effective Date:	
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (check One)				Modification #	
	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
Expenses	Original	Original	Original	Original	Total
Salaries & Benefits	\$116,700	\$120,352	\$122,861	\$125,416	\$485,329
Operating-Direct	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Subtotal	\$121,700	\$125,352	\$127,861	\$130,416	\$505,329
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$18,256	\$18,803	\$19,177	\$19,563	\$75,799
CODB Eligible Expenses	\$139,956	\$144,155	\$147,038	\$149,979	\$581,128
Consultant/Subcontractor (\$25,000+)					
Direct Client Pass-Through					
Capital Expenses					
Total Expenses	\$139,956	\$144,155	\$147,038	\$149,979	\$581,128
HSA / DAS Revenues					
Total HSA / DAS Revenues	\$139,956	\$144,155	\$147,038	\$149,979	\$581,128
Grantee Revenues					
Total Grantee Revenues					
Total Revenues	\$139,956	\$144,155	\$147,038	\$149,979	\$581,128
Prepared by:					
<i>Telephone No. & Email:</i>				<i>HSA Budget Form (3/24)</i>	

Grantee: SteppingStone Program: Alzheimer's Day Care Resource Center																				Appendix B, Page 2						
Salaries & Benefits Detail																										
POSITION TITLE	Agency Totals		HSA Program		7/1/24 - 6/30/25		Agency Totals		HSA Program		7/1/25 - 6/30/26		Agency Totals		HSA Program		7/1/26 - 6/30/27		Agency Totals		HSA Program		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	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total					
Program Coordinator	\$79,483	1.00	75%	0.75	\$59,612	\$79,483	1.00	75%	0.75	\$59,863	\$79,483	1.00	78%	0.78	\$61,913	\$79,483	1.00	80%	0.80	\$63,904	\$245,292					
Activity Coordinator	\$54,674	0.50	50%	0.25	\$13,669	\$54,674	0.50	60%	0.30	\$16,402	\$54,674	0.50	60%	0.30	\$16,402	\$54,674	0.50	60%	0.30	\$16,498	\$62,971					
Program Aide	\$44,133	0.50	50%	0.25	\$11,033	\$44,133	0.50	50%	0.25	\$11,033	\$44,133	0.50	50%	0.25	\$11,033	\$44,133	0.50	50%	0.25	\$11,033	\$44,132					
Volunteer Coordinator	\$44,133	0.50	50%	0.25	\$11,033	\$44,133	0.50	50%	0.25	\$11,033	\$44,133	0.50	50%	0.25	\$11,033	\$44,133	0.50	50%	0.25	\$11,033	\$44,132					
				-					-					-					-							
				-					-					-					-							
				-					-					-					-							
				-					-					-					-							
				-					-					-					-							
TOTALS	\$222,423	2.50	2.25	1.50	\$95,347	\$222,423	2.50	235%	1.55	\$98,331	\$222,423	2.50	238%	1.58	\$100,381	\$222,423	2.50	241%	1.61	\$102,468	\$396,527					
FRINGE BENEFIT RATE	22%									22%																
EMPLOYEE FRINGE BENEFITS					\$21,353					\$22,021					\$22,480					\$22,948	\$88,802					
TOTAL SALARIES & BENEFITS					\$116,700					\$120,352					\$122,861					\$125,416	\$485,329					

HSA Budget Form (3/24)

Grantee: SteppingStone
Program: Alzheimer's Day Care Resource Center

Appendix B, Page 3

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/26 - 6/30/27 Original	7/1/27 - 6/30/28 Original	7/1/24 - 6/30/28 Total
Expenditure Category					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Garbage)					
Office Supplies, Postage					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Staff Training					
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
Consultant/Subcontractor (\$25,000 & Under)					
Other					
Program Activity Supplies	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000
Total Operating Expense	\$5,000	\$5,000	\$5,000	\$5,000	\$20,000

HSA Budget Form (3/24)

SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

PROGRAM: Alzheimer’s Day Care Resource Center (ADCRC)

FISCAL YEAR: 07/01/2024 - 06/30/2028

AGENCY: SteppingStone Health

DIRECTOR: Daniel Gallagher

PHONE No: 415-974-6784

SITES:					
Name of Site	SteppingStone Mission Creek Day Health				
Address and Zip	930 Fourth Street, SF, CA 94158				
Phone Number	415-974-6784				
Fax Number	415-974-6785				
Neighborhood	South of Market				
Muni Line #s	K, L, N, T				
Person in Charge	Madeleine Barry, MSW				
Site Manger	Maria Fernandez				
Programs Offered at Site	ADCRC, ADHC				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun				
Hours Open	7am-5pm				
Hours of <u>scheduled</u> programming	9am-3pm				
Hours of service	9am-3:30pm				
Annual number of units at site	15000				
Average number of units per day	60				
Total number of service days in FY	250				
Days closed	Saturday, Sunday, Holidays				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				