



**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](http://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)** TO PROVIDE AGING AND DISABILITY RESOURCE CENTERS (see table on page 2)

DS  
EL

**GRANT TERM:** 7/1/2024-6/30/2026

<b>GRANT AMOUNT:</b>	<u>New</u>	<u>Contingency</u>	<u>Total</u>
	\$1,831,212	\$183,121	\$2,014,333

<b>ANNUAL AMOUNT</b>	<u>FY 24/25</u>	<u>FY 25/26</u>
	\$902,075	\$929,137



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$1,574,842	\$256,370		\$183,121	\$2,014,333
<b>PERCENTAGE:</b>	86%	14%			100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into grants with multiple providers for the period of July 1, 2024 to June 30, 2026, in an amount of \$1,831,212, plus a 10% contingency for a total amount not to exceed \$2,014,333. The purpose of the grants are to provide aging and disability resource centers at locations throughout San Francisco.

<b>Grantee</b>	<b>FY 24/25</b>	<b>FY 25/26</b>	<b>Total</b>	<b>10% Contingency</b>	<b>Not to Exceed</b>
Episcopal Community Services	\$149,068	\$153,540	\$302,608	\$30,261	\$332,869
Self-Help for the Elderly	\$753,007	\$775,597	\$1,528,604	\$152,860	\$1,681,464
<b>Total</b>	<b>\$902,075</b>	<b>\$929,137</b>	<b>\$1,831,212</b>	<b>\$183,121</b>	<b>\$2,014,333</b>

### **Background**

The Aging and Disability Resource Center (ADRC) serves as a one-stop shop for information, referral, assistance, and translation services throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. Specifically, ADRCs around the City provide services that assist people to continue living independently in the community, connecting them with long-term services and supports. ADRCs are located throughout the City and each ADRC has trained staff and on-site supervisors.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts in San Francisco. Some districts have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. There are two citywide ADRCs, one specializing in serving the disability community and the other specializing in serving the LGBTQ+ community. Each ADRC must demonstrate the capability to serve older people, adults with disabilities, and caregivers in their supervisory district or citywide in their area of specialty.

### **Services to be Provided**

The ADRC provides one-stop shop access to information, referral, assistance, and translation services for older people, adults with disabilities, and caregivers at key neighborhood locations. ADRC staff work in multiple sites which are already hubs for older people and adults with disabilities accessing other services. The ADRC staff provide services a minimum of five days a week. Additionally, ADRC staff conduct multi-cultural, multi-lingual outreach at various locations and during various events throughout the district and City. An additional Citywide ADRC Coordinator meets with staff employed by ADRC sites on a weekly and monthly basis. This coordinator is responsible for providing training, clinical consultation, technical assistance, and executing an outreach plan for the ADRC sites.

<b>Grantee</b>	<b>District(s)</b>	<b>Unduplicated clients</b>
Episcopal Community Services	6	550
Self-Help for the Elderly	3,4,7,11	5790

**Selection**

Grantees were selected through Request for Proposals 1105, which was competitively bid in March 2024.

**Funding**

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

**ATTACHMENTS**

**Episcopal Community Services**

Appendix A: Services to be provided

Appendix B: Program budget

**Self-Help for the Elderly**

Appendix A: Services to be provided

Appendix B: Program budget

**APPENDIX A – SERVICES TO BE PROVIDED  
EPISCOPAL COMMUNITY SERVICES OF SAN FRANCISCO  
AGING AND DISABILITY RESOURCE CENTER (ADRC)  
July 1, 2024 to June 30, 2026**

**I. Purpose of Grant**

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

**II. Definitions**

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage their own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CARBON	Contracts Administration, Reporting and Billing On Line System

Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
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 clients they serve (Chapter 104, Sections 104.1 through 104.9).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

**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 needs:

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

**IV. Client Eligibility for ADRC Services**

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

**V. Location and Time of Services**

Services will take place at the Canon Kip Senior Center, 705 Natoma St, San Francisco, CA 94103. Hours of operation are from 9:00am-4:00pm, Monday to Friday.

**VI. Description of Services**

Aging and Disability Resource Centers (ADRC) provide information and referral, assistance, follow-up, and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities, and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts throughout San Francisco, with a concentration in areas that have dense populations of high need and with an ability to serve younger adults with disabilities. There are also 2 Citywide ADRCs, one with a focus on providing services to the LGBTQ+ community and the other focused on services for the disability community. Episcopal Community Services of San Francisco will be required to serve older adults, adults with disabilities, and caregivers in District 6.

Grantee shall provide the following services during the term of this grant:

1. Grantee will conduct client assessments to identify service needs to be addressed;
2. Grantee will provide Information and Referral of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, veterans services, vocational training, LGBTQ+ programs/services and transportation;
3. Grantee will provide assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
4. Grantee will provide follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider;

5. Grantee will conduct a minimum of 3 outreach events per quarter per 1.0 FTE. At least one of these quarterly events should be conducted at a community center or senior service provider at a location within the supervisorial district. At least one of these quarterly events must target the adult with disability population.
6. Grantee will demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs can be met by their services.
7. Grantee will designate at least one 1.0 FTE as the ADRC service provider.
8. Grantee will offer back-up staff who can offer services in case of any absence.
9. Grantee will develop a procedure for keeping abreast of relevant programs and resources for clients.
10. Grantee will develop and demonstrate targeted outreach to adults with disabilities.
11. Grantee will conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services.
12. Grantee will participate in weekly staff consultations with Citywide ADRC Coordinator.
13. Grantee will work with Citywide ADRC Coordinator in developing and scheduling outreach events.
14. Grantee will participate in monthly ADRC group meeting/training organized and hosted by Citywide ADRC Coordinator.
15. Grantee will attend quarterly meeting between on-site supervisor and ADRC Coordinator.
16. Grantee will collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
17. Grantee will develop partnerships with other organizations working within the district to ensure a robust network of service provision.
18. Grantee will administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
19. Grantee will ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
20. Grantee will make all efforts to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

## **VII. Service Objectives**

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



	<b>FY 24/25</b>	<b>FY 25/26</b>
Unduplicated Consumers	550	550
Units of Information and Referral	660	660
Units of Assistance	880	880
Units of Follow-up	330	330
Outreach Events	12	12
Percentage of unduplicated consumers who are disabled.	15%	15%

### **VIII. Outcome Objectives**

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

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

### **IX. Reporting Requirements**

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

- A.** Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B.** Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5<sup>th</sup> working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10<sup>th</sup> day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

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

Patrick Garcia  
Contract Manager  
Human Services Agency  
Patrick.Garcia@SFgov.org

**X. Monitoring Activities**

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

<b>Grantee: Episcopal Community Services</b>		Full Term:	7/1/24 - 6/30/26
<b>Program: ADRC</b>		Effective Date:	
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (Check One)		Modification #	
	<b>7/1/24 - 6/30/25</b>	<b>7/1/25 - 6/30/26</b>	<b>7/1/24 - 6/30/26</b>
<b>Expenses</b>	<b>Original</b>	<b>Original</b>	<b>Total</b>
Salaries & Benefits	\$127,624	\$131,513	\$259,137
Operating-Direct	\$2,000	\$2,000	\$4,000
<b>Subtotal</b>	<b>\$129,624</b>	<b>\$133,513</b>	<b>\$263,137</b>
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$19,444	\$20,027	\$39,471
CODB Eligible Expenses	\$149,068	\$153,540	\$302,608
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
<b>Total Expenses</b>	<b>\$149,068</b>	<b>\$153,540</b>	<b>\$302,608</b>
<b>HSA / DAS Revenues</b>			
<b>Total HSA / DAS Revenues</b>	<b>\$149,068</b>	<b>\$153,540</b>	<b>\$302,608</b>
<b>Grantee Revenues</b>			
<b>Total Grantee Revenues</b>			
<b>Total Revenues</b>	<b>\$149,068</b>	<b>\$153,540</b>	<b>\$302,608</b>
<b>Prepared by:</b>			
<i>Telephone No. &amp; Email:</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: Episcopal Community Services											Appendix B, Page 2	
Program: ADRC												
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	7/1/24 - 6/30/26	
	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	
I&R Specialist	\$64,210	1.00	100%	1.00	\$64,210	\$66,163	1.00	100%	1.00	\$66,163	\$130,373	
Associate Director of Healthy Aging	\$126,991	0.25	100%	0.25	\$31,748	\$130,877	0.25	100%	0.25	\$32,719	\$64,467	
				-					-			
				-					-			
				-					-			
<b>TOTALS</b>	<b>\$191,201</b>	<b>1.25</b>	<b>2.00</b>	<b>1.25</b>	<b>\$95,958</b>	<b>\$197,040</b>	<b>1.25</b>	<b>200%</b>	<b>1.25</b>	<b>\$98,882</b>	<b>\$194,840</b>	
<b>FRINGE BENEFIT RATE</b>	<b>33%</b>											<b>33%</b>
<b>EMPLOYEE FRINGE BENEFITS</b>					\$31,666					\$32,631	\$64,297	
<b>TOTAL SALARIES &amp; BENEFITS</b>					\$127,624					\$131,513	\$259,137	

HSA Budget Form (3/24)

**Grantee: Episcopal Community Services**  
**Program: ADRC**

**Appendix B, Page 3**

**Operating Expenses Detail**

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/24 - 6/30/26 Total
<b><u>Expenditure Category</u></b>			
Rental of Property			
Utilities(Elec, Water, Gas, Phone, Garbage)			
Office Supplies, Postage	\$500	\$1,500	\$2,000
Building Maintenance Supplies and Repair			
Printing and Reproduction			
Insurance			
Staff Training			
Staff Travel-(Local & Out of Town)			
Rental of Equipment	\$1,500	\$500	\$2,000
<b><u>Consultant/Subcontractor (\$25,000 &amp; Under)</u></b>			
<b><u>Other</u></b>			
<b><u>Total Operating Expense</u></b>	<b>\$2,000</b>	<b>\$2,000</b>	<b>\$4,000</b>

*HSA Budget Form (3/24)*

**APPENDIX A-1 – SERVICES TO BE PROVIDED  
SELF-HELP FOR THE ELDERLY  
AGING AND DISABILITY RESOURCE CENTER (ADRC)  
July 1, 2024 to June 30, 2028**

**I. Purpose of Grant**

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

**II. Definitions**

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transferring, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage their 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.
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Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
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SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

### 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 needs:

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

#### IV. Client Eligibility for ADRC Services

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

#### V. Location and Time of Services

Services will take place at the Self-Help for the Elderly sites detailed below:

District 3  
Social Services Department  
829 Kearny Street  
San Francisco, CA 94133  
Monday-Friday  
9:00am-5:00pm

District 3  
Geen Mun Senior Center  
777 Stockton St #106  
San Francisco, CA 94108  
Monday-Friday  
9:00am-5:00pm  
Saturday 9:00am-1:00pm

District 4  
South Sunset Senior Center  
2601 40<sup>th</sup> Ave  
San Francisco, CA 94116  
Monday-Friday  
9:00am-3:00pm

District 7  
West Portal Clubhouse  
131 Lenox Way  
San Francisco, CA 94127  
Monday-Friday  
9:00am-2:00pm

District 11  
Geneva Community Center  
5050 Mission St, Suite C  
San Francisco, CA 94112  
Monday-Friday  
9:00am-5:00pm

#### VI. Description of Services

Aging and Disability Resource Centers (ADRC) provide information and referral, assistance, follow-up, and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities, and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts throughout San Francisco, with a concentration in areas that have dense populations of high need and with an ability to serve younger adults with disabilities. There are also 2 Citywide ADRCs,

one with a focus on providing services to the LGBTQ+ community and the other focused on services for the disability community. Self-Help for the Elderly will be required to serve older adults, adults with disabilities, and caregivers in Districts 3,4,7 and 11.

Grantee shall provide the following services during the term of this grant:

1. Grantee will conduct client assessments to identify service needs to be addressed;
2. Grantee will provide Information and Referral of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, veterans services, vocational training, LGBTQ+ programs/services and transportation;
3. Grantee will provide assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
4. Grantee will provide follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider;
5. Grantee will conduct a minimum of 3 outreach events per quarter per 1.0 FTE. At least one of these quarterly events should be conducted at a community center or senior service provider at a location within the supervisorial district. At least one of these quarterly events must target the adult with disability population.
6. Grantee will demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs can be met by their services.
7. Grantee will designate at least one 1.0 FTE as the ADRC service provider.
8. Grantee will offer back-up staff who can offer services in case of any absence.
9. Grantee will develop a procedure for keeping abreast of relevant programs and resources for clients.
10. Grantee will develop and demonstrate targeted outreach to adults with disabilities.
11. Grantee will conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services.
12. Grantee will participate in weekly staff consultations with Citywide ADRC Coordinator.
13. Grantee will work with Citywide ADRC Coordinator in developing and scheduling outreach events.
14. Grantee will participate in monthly ADRC group meeting/training organized and hosted by Citywide ADRC Coordinator.
15. Grantee will attend quarterly meeting between on-site supervisor and ADRC Coordinator.

16. Grantee will collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
17. Grantee will develop partnerships with other organizations working within the district to ensure a robust network of service provision.
18. Grantee will administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
19. Grantee will ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
20. Grantee will make all efforts to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

## VII. Service Objectives

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

	FY 24/25	FY 25/26
Unduplicated Consumers	5790	5790
Units of Information and Referral	8180	8180
Units of Assistance	9880	9880
Units of Follow-up	4090	4090
Outreach Events	100	100
Percentage of unduplicated consumers who are disabled.	15%	15%

## VIII. Outcome Objectives

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

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

## IX. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15<sup>th</sup> of the following month. Monthly service objectives include an

unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.

- B.** Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5<sup>th</sup> working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10<sup>th</sup> day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

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

Tahir Shaikh  
Contract Manager  
Human Services Agency  
Tahir.Shaikh@SFgov.org

## **X. Monitoring Activities**

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

## HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

<b>SELF HELP FOR THE ELDERLY</b>		Full Term:	7/1/24 - 6/30/26
<b>Program: ADRC</b>		Effective Date:	
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (Check One)		Modification #	
	<b>7/1/24 - 6/30/25</b>	<b>7/1/25 - 6/30/26</b>	<b>7/1/24 - 6/30/26</b>
<b>Expenses</b>	<b>Original</b>	<b>Original</b>	<b>Total</b>
Salaries & Benefits	\$614,491	\$631,888	\$1,246,379
Operating-Direct	\$40,298	\$42,545	\$82,843
<b>Subtotal</b>	<b>\$654,789</b>	<b>\$674,433</b>	<b>\$1,329,222</b>
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$98,218	\$101,164	\$199,382
CODB Eligible Expenses	\$753,007	\$775,597	\$1,528,604
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
<b>Total Expenses</b>	<b>\$753,007</b>	<b>\$775,597</b>	<b>\$1,528,604</b>
<b>HSA / DAS Revenues</b>			
<b>Total HSA / DAS Revenues</b>	<b>\$753,007</b>	<b>\$775,597</b>	<b>\$1,528,604</b>
<b>Grantee Revenues</b>			
<b>Total Grantee Revenues</b>			
<b>Total Revenues</b>	<b>\$753,007</b>	<b>\$775,597</b>	<b>\$1,528,604</b>
<b>Prepared by:</b>			
<b>Telephone No. &amp; Email:</b>		<b>HSA Budget Form (3/24)</b>	

SELF HELP FOR THE ELDERLY												Appendix B, Page 2	
Program: ADRC													
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	7/1/24 - 6/30/26		
	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		
I & A Specialist Coordinator - 829 Kea	\$58,552	1.00	100%	1.00	\$58,552	\$60,309	1.00	100%	1.00	\$60,309	\$118,861		
I & A Specialist - 829 Kearny Street	\$51,480	1.00	100%	1.00	\$51,480	\$53,024	1.00	100%	1.00	\$53,024	\$104,504		
I & A Specialist-Geen Mun	\$51,480	1.00	100%	1.00	\$51,480	\$53,024	1.00	100%	1.00	\$53,024	\$104,504		
I & A Specialist -South Sunset/Geen M	\$51,480	0.80	100%	0.80	\$41,184	\$53,024	0.80	100%	0.80	\$42,419	\$83,603		
I & A Specialist -South Sunset	\$51,480	1.00	100%	1.00	\$51,480	\$53,024	1.00	100%	1.00	\$53,024	\$104,504		
I & A Specialist -West Portal	\$51,480	0.80	100%	0.80	\$41,184	\$53,024	0.80	100%	0.80	\$42,419	\$83,603		
I & A Specialist -Vietnamese	\$56,576	1.00	68%	0.68	\$38,189	\$58,273	1.00	68%	0.68	\$39,625	\$77,814		
I & A Specialist -Excelsior	\$51,480	1.00	100%	1.00	\$51,480	\$53,024	1.00	100%	1.00	\$53,024	\$104,504		
I & A Specialist -Excelsior Filipino	\$51,480	1.00	100%	1.00	\$51,480	\$53,024	1.00	100%	1.00	\$53,024	\$104,504		
Director of Social Services	\$120,000	1.00	10%	0.10	\$12,000	\$123,600	1.00	10%	0.10	\$12,000	\$24,000		
Program Manager	\$85,000	1.00	20%	0.20	\$17,000	\$87,550	1.00	19%	0.19	\$17,000	\$34,000		
Program Assistant	\$47,840	1.00	15%	0.15	\$7,176	\$49,275	1.00	15%	0.15	\$7,176	\$14,352		
				-					-				
<b>TOTALS</b>	<b>\$728,328</b>	<b>11.60</b>	<b>9.13</b>	<b>8.73</b>	<b>\$472,685</b>	<b>\$750,175</b>	<b>11.60</b>	<b>912%</b>	<b>8.72</b>	<b>\$486,068</b>	<b>\$958,753</b>		
<b>FRINGE BENEFIT RATE</b>	<b>30%</b>								<b>30%</b>				
<b>EMPLOYEE FRINGE BENEFITS</b>					<b>\$141,806</b>					<b>\$145,820</b>	<b>\$287,626</b>		
<b>TOTAL SALARIES &amp; BENEFITS</b>					<b>\$614,491</b>					<b>\$631,888</b>	<b>\$1,246,379</b>		

HSA Budget Form (3/24)

**SELF HELP FOR THE ELDERLY**  
**Program: ADRC**

**Operating Expenses Detail**

	<b>7/1/24 - 6/30/25</b>	<b>7/1/25 - 6/30/26</b>	<b>7/1/24 - 6/30/26</b>
<b>Expenditure Category</b>	<b>Original</b>	<b>Original</b>	<b>Total</b>
Rental of Property	\$24,542	\$25,139	\$49,681
Utilities(Elec, Water, Gas, Phone, Garbage)	\$1,550	\$2,500	\$4,050
Office Supplies, Postage	\$1,100	\$1,100	\$2,200
Building Maintenance Supplies and Repair	\$1,500	\$2,000	\$3,500
Printing and Reproduction			
Insurance	\$3,844	\$3,844	\$7,688
Licenses and Fees			
Staff Training	\$250	\$250	\$500
Staff Travel-(Local & Out of Town)	\$400	\$400	\$800
Rental of Equipment	\$300	\$300	\$600
<b>Consultant/Subcontractor (\$25,000 &amp; Under)</b>			
<b>Other</b>			
Communications	\$6,512	\$6,512	\$13,024
Recruitment	\$300	\$500	\$800
<b>Total Operating Expense</b>	<b>\$40,298</b>	<b>\$42,545</b>	<b>\$82,843</b>

*HSA Budget Form (3/24)*