



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

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



London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DATE: WEDNESDAY, JUNE 5, 2024

SUBJECT: NEW GRANTS: **MULTIPLE VENDORS (NON-PROFIT)** TO PROVIDE LEGAL SERVICES FOR OLDER ADULTS, YOUNGER ADULTS WITH DISABILITIES

DS
EL

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

GRANT AMOUNT:	New	Contingency	Total
	\$4,294,792	\$429,479	\$4,724,271

ANNUAL AMOUNT See Table below

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$2,705,719	\$1,589,073	\$429,479	\$4,724,271	
PERCENTAGE:	63%	37%	100%		

The Department of Disability and Aging Services (DAS) requests authorization to enter into grants with multiple vendors for the period of July 1, 2024 through June 30, 2026, in an amount of \$4,294,792, plus a 10% contingency for a total amount not to exceed \$4,724,271. The purpose of the grants is to provide legal services for older adults and younger adults with disabilities.

	FY 24/25	FY 25/26	Total	Contingency	Not to Exceed
<u>Older Adults</u>					
Asian Pacific Islander Legal Outreach (APILO)	\$216,300	\$222,789	\$439,089	\$43,909	\$482,998
La Raza Centro Legal	\$328,992	\$338,862	\$667,854	\$66,785	\$734,639
Legal Assistance to the Elderly	\$804,553	\$828,690	\$1,633,243	\$163,324	\$1,796,567
Open Door Legal	\$110,947	\$114,276	\$225,223	\$22,522	\$247,745
UC Law SF MLPS	\$180,250	\$185,658	\$365,908	\$36,591	\$402,499
<u>Younger Adults with Disabilities</u>					
Asian Pacific Islander Legal Outreach (APILO)	\$141,110	\$145,343	\$286,453	\$28,645	\$315,098
Independent Living Resource Center SF	\$183,340	\$188,840	\$372,180	\$37,218	\$409,398
La Raza Centro Legal	\$38,368	\$39,519	\$77,887	\$7,789	\$85,676
Legal Assistance to the Elderly	\$66,950	\$68,959	\$135,909	\$13,591	\$149,500
Open Door Legal	\$44,850	\$46,196	\$91,046	\$9,105	\$100,151
Total (Older Adults + Adults with Disabilities)	\$2,115,660	\$2,179,132	\$4,294,792	\$429,479	\$4,724,271

Background

Effective legal interventions can be critical to maintaining or securing a better quality of life for older adults and adults with disabilities. DAS funded legal services programs provide their clients with information and guidance designed to allow them to make informed decisions and assert their rights on a variety of issues. Examples of some of these areas of assistance include:

- Enforcing rights to safe and habitable living situation
- Appealing incorrect determinations relating to retirement or disability payments and benefits
- Will and advance directive preparation
- Protective orders stopping physical abuse and/or reversing financial abuse
- Deterring illegal business practices or predatory debt collection
- Ensuring accessibility to services and resources

DAS legal services grants are separated into “Older Adult” (clients aged 60+) and “Younger Adult with a Disability” (aged 18-59) grants due to

eligibility criteria tied to funding sources. Specifically, Federal funds are leveraged to support the older adult grants, which focus eligibility on clients aged 60+. DAS grants for younger adults with a disability utilize local funds which do not have these restrictions.

Services to be Provided

Grantees will operate a legal services program offering legal information and representation to clients in need of assistance. Grantees have and will continue to develop legal expertise in areas most impacting older adults and adults with disabilities. Grantees are also expected to be knowledgeable about changes in the law which might affect provision of services. Grantees are asked to be as culturally and linguistically competent as possible to best serve a diverse San Francisco.

Grantees will each offer an initial intake process for clients in need of services. Upon completion of screening, further services will fall into one of the following modules of services:

Information and Referral: the client concern is more appropriately referred to another service for assistance.

Advise and Close: the client issue is very easily addressed, advice is provided and the case is closed.

Brief Services: assistance is provided to prepare legal correspondence, fill out an official form, review legal documents, etc.

Case Acceptance / Legal Representation: client is provided with legal representation including representation in court or administrative law proceedings.

Selection

Grantees were selected through Request for Proposals #1112 which was competitively bid in February 2024.

Funding

Funding for these grants is provided through Federal and Local Funds.

ATTACHMENTS

Older Adults

Asian Pacific Islander Legal Outreach (APILO)

Appendix A – Scope of Services

Appendix B – Budget

La Raza Centro Legal

Appendix A – Scope of Services

Appendix B - Budget

Legal Assistance to the Elderly

Appendix A – Scope of Services

Appendix B - Budget

Open Door Legal

Appendix A – Scope of Services

Appendix B - Budget

UC LAW MLPS

Appendix A – Scope of Services

Appendix B - Budget

Younger Adults with Disabilities

Asian Pacific Islander Legal Outreach (APILO)

Appendix A – Scope of Services

Appendix B – Budget

Independent Living Resource Center SF

Appendix A – Scope of Services

Appendix B - Budget

La Raza Centro Legal

Appendix A – Scope of Services

Appendix B - Budget

Legal Assistance to the Elderly

Appendix A – Scope of Services

Appendix B - Budget

Open Door Legal

Appendix A – Scope of Services

Appendix B - Budget

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**Effective July 1, 2024 – June 30, 2026****Nihonmachi Legal Outreach, dba Asian Pacific Islander Legal Outreach****Legal Services for Older Adults****I. Purpose**

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder or dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
California State Bar	The State Bar of California, regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	Nihonmachi Legal Outreach dba Asian Pacific Islander Legal Outreach
HSA	Human Services Agency of the City and County of San Francisco

Legal Assistance	Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
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 participants to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
Older Americans Act	Federal legislation originally signed in 1965 and reauthorized in subsequent years. Creates a nationwide network of services focused on older adults.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform participant 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 participants they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

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

- Persons with low income

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) An older adult aged 60 years or older *and*
- 3) In need of legal services

V. Location and Time of Services

Services will be based at Grantee’s offices, 1121 Mission Street, San Francisco, CA 94103. Offices are open Monday through Friday 9 am – 5 pm except holidays.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to older adults, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client’s independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder/dependent abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging’s California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment

- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least **80** unduplicated clients.

- 2) Grantee will provide at least **2,025** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
- B. Grantee will enter into the SF DAS GetCare database all units of service by the 5th working day of the month for the preceding month.
- C. 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.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- F. Grantee will develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee program staff will complete an elder abuse mandated reporter training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.
- I. Grantee will 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.

- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

Community Focal Point	District	Address
Richmond Senior Center	1	6221 Geary Blvd, 94121
Aquatic Park Senior Center	2	890 Beach Street, 94109
Geen Mun Senior Center	3	777 Stockton St, 94108
South Sunset Activity Center	4	2601 40 th Ave, 94116
Western Addition Senior Center	5	1390 ½ Turk Street, 94115
Downtown Senior Center	5	481 O’Farrell St, 94102
Canon Kip Senior Center	6	705 Natoma, 94103
West Portal Clubhouse	7	131 Lenox Way, 94127
30th Street Senior Center (On Lok)	8	225 30th St, 94131
Mission Neighborhood Centers	9	362 Capp St, 94110
Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102
Toolworks	Disability Focus	22 Battery Street, Suite 300, 94111
DAS Benefits and Resources Hub	Citywide	2 Gough, 94103

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

Emmy Miller
 Contracts Manager/HSA
 P.O. Box 7988
 San Francisco, CA 94120
emmy.miller@sfgov.org

Michael Zaugg
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120
michael.zaugg@sfgov.org

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee: Nihonmachi dba API Legal Outreach		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Older Adults		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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$144,193	\$144,193	\$288,386
Operating-Direct	\$43,894	\$53,537	\$97,431
Subtotal	\$188,087	\$197,730	\$385,817
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$28,213	\$25,059	\$53,272
COB Eligible Expenses	\$216,300	\$222,789	\$439,089
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$216,300	\$222,789	\$439,089
Total HSA / DAS Revenues	\$216,300	\$222,789	\$439,089
Grantee Revenues			
Total Grantee/Contractor Revenues			
Total Revenues	\$216,300	\$222,789	\$439,089
Prepared by: Ted Tang			
<i>Telephone No. & Email:</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: Nihonmachi dba API Legal Outreach
 Program: Legal Services for Older Adults

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	
	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	
Managing Attorney	\$130,000	0.20	100%	0.20	\$26,000	\$130,000	0.20	100%	0.20	\$26,000	\$52,000	
Supervising Attorney	\$85,592	0.30	100%	0.30	\$25,678	\$85,592	0.30	100%	0.30	\$25,678	\$51,356	
Staff Attorney(s)	\$72,426	0.50	100%	0.50	\$36,213	\$72,426	0.50	100%	0.50	\$36,213	\$72,426	
Legal Assistant / Case Manager	\$65,790	0.35	100%	0.35	\$23,027	\$65,790	0.35	100%	0.35	\$23,027	\$46,054	
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TOTALS	\$353,808	1.35	4.00	1.35	\$110,918	\$353,808	1.35	400%	1.35	\$110,918	\$221,836	
FRINGE BENEFIT RATE	30%								30%			
EMPLOYEE FRINGE BENEFITS					\$33,275					\$33,275	\$66,550	
TOTAL SALARIES & BENEFITS					\$144,193					\$144,193	\$288,386	

HSA Budget Form (3/24)

Grantee: Nihonmachi dba API Legal Outreach
Program: Legal Services for Older Adults

Appendix B, Page 3

Operating Expenses Detail

	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/24 - 6/30/26
	Original	Original	Total
<u>Expenditure Category</u>			
Rental of Property			
Utilities(Elec, Water, Gas, Phone, Garbage)	\$6,500	\$8,500	\$15,000
Office Supplies, Postage	\$8,500	\$9,500	\$18,000
Building Maintenance Supplies and Repair	\$6,500	\$8,500	\$15,000
Printing and Reproduction			
Insurance	\$5,500	\$6,500	\$12,000
Staff Training			
Staff Travel-(Local & Out of Town)			
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
Audit	\$5,500	\$6,500	\$12,000
<u>Other</u>			
Building occupancy - mortgage interest	\$11,394	\$14,037	\$25,431
<u>Total Operating Expense</u>	\$43,894	\$53,537	\$97,431

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**Effective July 1, 2024 – June 30, 2026****La Raza Centro Legal****Legal Services for Older Adults****I. Purpose**

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder/dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

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Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	La Raza Centro Legal
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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.
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III. Target Population

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

- Persons with low income

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) An older adult aged 60 years or older *and*
- 3) In need of legal services

V. Location and Time of Services

Services will be based at Grantee's offices, 474 Valencia Street, Suite 295, San Francisco 94110. Offices are open Monday through Friday 9 am – Noon, 1 pm – 5 pm. Closed for holidays.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to older adults, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client's independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

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- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder/dependent abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder or Dependent Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Legal Services Bulletin

Grantee will serve as the lead agency among DAS funded legal services providers in the production and distribution of a legal newsletter for older adults and adults with disabilities. The “Senior Rights Bulletin” will be issued 3 times per year (spring, summer, fall) and cover legal topics relevant to older adults and adults with disabilities living in San Francisco. Past topics have included tenants rights, avoiding scams, changes to benefits such as CalFresh, and the importance of participating in the Census.

Grantee responsibilities for the Senior Rights Bulletin shall include:

- Collaboration with other DAS funded legal services providers for development of relevant content for the newsletter. This includes scheduling of regular meetings, identifying subject areas for content, and assigning content development among DAS legal services providers.

- Translation of newsletter information into Spanish, Chinese, English, Vietnamese, and Tagalog.
- Publication and distribution of newsletter in both print and electronic format in spring, summer, and fall each calendar year (3 issues per year)

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least **170** unduplicated clients.
- 2) Grantee will provide at least **3000** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
- B. Grantee will enter into the SF DAS GetCare database all units of service by the 5th working day of the month for the preceding month.
- C. Monthly and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- F. Grantee will develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee program staff will complete an elder abuse mandated reporter training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.
- I. Grantee will 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.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

Community Focal Point	District	Address
Richmond Senior Center	1	6221 Geary Blvd, 94121
Aquatic Park Senior Center	2	890 Beach Street, 94109
Geen Mun Senior Center	3	777 Stockton St, 94108
South Sunset Activity Center	4	2601 40 th Ave, 94116
Western Addition Senior Center	5	1390 ½ Turk Street, 94115
Downtown Senior Center	5	481 O’Farrell St, 94102
Canon Kip Senior Center	6	705 Natoma, 94103
West Portal Clubhouse	7	131 Lenox Way, 94127
30th Street Senior Center (On Lok)	8	225 30th St, 94131
Mission Neighborhood Centers	9	362 Capp St, 94110
Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102

Toolworks	Disability Focus	22 Battery Street, Suite 300, 94111
DAS Benefits and Resources Hub	Citywide	2 Gough, 94103

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

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

Michael Zaugg
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120
 michael.zaugg@sfgov.org

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee: La Raza Centro Legal		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Older Adults		Effective Date:	
New <input 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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$267,229	\$275,225	\$542,454
Operating-Direct	\$18,851	\$19,438	\$38,289
Subtotal	\$286,080	\$294,663	\$580,743
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$42,912	\$44,199	\$87,111
COB Eligible Expenses	\$328,992	\$338,862	\$667,854
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$328,992	\$338,862	\$667,854
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$328,992	\$338,862	\$667,854
Grantee Revenues			
Total Grantee Revenues			
Total Revenues	\$328,992	\$338,862	\$667,854
Prepared by:			
<i>Telephone No. & Email:</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: La Raza Centro Legal											Appendix B, Page 2
Program: Legal Services for Older Adults											
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
Staff Attorney	\$89,950	0.90	100%	0.90	\$80,955	\$92,600	0.90	100%	0.90	\$83,340	\$164,295
Legal Assistant	\$63,850	0.65	100%	0.65	\$41,503	\$65,800	0.65	100%	0.65	\$42,770	\$84,273
Admin Assistant	\$68,600	0.10	100%	0.10	\$6,860	\$70,700	0.10	100%	0.10	\$7,070	\$13,930
Legal Director	\$110,300	0.65	100%	0.65	\$71,695	\$113,600	0.65	100%	0.65	\$73,840	\$145,535
Operations Specialist	\$63,850	0.20	100%	0.20	\$12,770	\$65,800	0.20	100%	0.20	\$13,160	\$25,930
				-					-		
				-					-		
				-					-		
				-					-		
				-					-		
TOTALS	\$396,550	2.50	5.00	2.50	\$213,783	\$408,500	2.50	500%	2.50	\$220,180	\$433,963
FRINGE BENEFIT RATE	25%						25%				
EMPLOYEE FRINGE BENEFITS					\$53,446					\$55,045	\$108,491
TOTAL SALARIES & BENEFITS					\$267,229					\$275,225	\$542,454

HSA Budget Form (3/24)

Grantee: La Raza Centro Legal **Appendix B, Page 3**
Program: Legal Services for Older Adults

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/24 - 6/30/26 Total
<u>Expenditure Category</u>			
Rental of Property	\$2,351	\$2,938	\$5,289
Utilities(Elec, Water, Gas, Phone, Garbage)			
Office Supplies, Postage			
Building Maintenance Supplies and Repair			
Printing and Reproduction	\$15,000	\$15,000	\$30,000
Insurance			
Staff Training			
Staff Travel-(Local & Out of Town)			
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
<u>Other</u>			
Design & Translation Fees	\$1,500	\$1,500	\$3,000
<u>Total Operating Expense</u>	\$18,851	\$19,438	\$38,289

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Effective July 1, 2024 – June 30, 2026

LEGAL ASSISTANCE TO THE ELDERLY

Legal Services for Older Adults

I. Purpose

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder or dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
California State Bar	The State Bar of California, regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	Legal Assistance to the Elderly (LAE)

HSA	Human Services Agency of the City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
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 participants to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
Older Americans Act	Federal legislation originally signed in 1965 and reauthorized in subsequent years. Creates a nationwide network of services focused on older adults.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform participant 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 participants they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

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

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) An older adult aged 60 years or older *and*
- 3) In need of legal services

V. Location and Time of Services

Legal Assistance to the Elderly's offices are located at 1663 Mission Street, Suite 225. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to older adults, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client's independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder or dependent abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least **573** unduplicated clients.
- 2) Grantee will provide at least **7,920** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
- B. Grantee will enter into the SF DAS GetCare database all units of service by the 5th working day of the month for the preceding month.
- C. 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.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- F. Grantee will develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee program staff will complete an elder abuse mandated reporter training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.

- I. Grantee will 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.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

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Western Addition Senior Center	5	1390 ½ Turk Street, 94115
Downtown Senior Center	5	481 O’Farrell St, 94102
Canon Kip Senior Center	6	705 Natoma, 94103
West Portal Clubhouse	7	131 Lenox Way, 94127
30th Street Senior Center (On Lok)	8	225 30th St, 94131
Mission Neighborhood Centers	9	362 Capp St, 94110
Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102
Toolworks	Disability Focus	22 Battery Street, Suite 300, 94111
DAS Benefits and Resources Hub	Citywide	2 Gough, 94103

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

Jason Chommanard
 Contracts Manager/HSA
 P.O. Box 7988
 San Francisco, CA 94120
jason.chommanard@sfgov.org

Katherine Moser
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120
katherine.moser@sfgov.org

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Grantee: Legal Assistance to the Elderly		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Older Adults		Effective Date:	
New <input 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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$608,199	\$626,445	\$1,234,644
Operating-Direct	\$91,412	\$94,155	\$185,567
Subtotal	\$699,611	\$720,600	\$1,420,211
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$104,942	\$108,090	\$213,032
CODB Eligible Expenses	\$804,553	\$828,690	\$1,633,243
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$804,553	\$828,690	\$1,633,243
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$804,553	\$828,690	\$1,633,243
Grantee Revenues			
Fundraising	\$27,500	\$30,000	\$57,500
State Bar Funding for Legal Services	\$56,392	\$56,392	\$112,784
MOHCD Funding for Tenant Right to Cou	\$1,237,020	\$1,237,020	\$2,474,040
Total Grantee Revenues	\$1,320,912	\$1,323,412	\$2,644,324
Total Revenues	\$2,125,465	\$2,152,102	\$4,277,567
Prepared by: Kitania Folk			
<i>Telephone No. & Email:</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: Legal Assistance to the Elderly **Appendix B, Page 2**
Program: Legal Services for Older Adults

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
Executive Director/Managing Atto	\$165,000	1.00	3%	0.03	\$4,950	\$169,950	1.00	3%	0.03	\$5,099	\$10,049
Director of Litigation	\$150,000	1.00	14%	0.14	\$20,892	\$154,500	1.00	14%	0.14	\$21,519	\$42,411
Supervising Attorney	\$116,200	1.00	53%	0.53	\$61,700	\$119,686	1.00	53%	0.53	\$63,551	\$125,251
Supervising Attorney	\$125,000	1.00	18%	0.18	\$22,137	\$128,750	1.00	18%	0.18	\$22,801	\$44,938
Senior Staff Attorney	\$120,324	1.00	99%	0.99	\$118,824	\$123,934	1.00	99%	0.99	\$122,389	\$241,213
Senior Staff Attorney	\$65,100	0.60	88%	0.53	\$57,070	\$67,053	0.60	88%	0.53	\$58,782	\$115,852
Staff Attorney	\$110,000	1.00	9%	0.09	\$10,000	\$113,300	1.00	9%	0.09	\$10,300	\$20,300
Staff Attorney	\$89,000	1.00	2%	0.02	\$2,000	\$91,670	1.00	2%	0.02	\$2,060	\$4,060
Staff Attorney	\$89,000	1.00	85%	0.85	\$75,747	\$91,670	1.00	85%	0.85	\$78,019	\$153,766
Paralegal	\$80,400	1.00	51%	0.51	\$41,145	\$82,812	1.00	51%	0.51	\$42,379	\$83,524
Paralegal	\$74,200	1.00	75%	0.75	\$55,468	\$76,426	1.00	75%	0.75	\$57,132	\$112,600
Frontline Screener	\$73,700	1.00	10%	0.10	\$7,500	\$75,911	1.00	10%	0.10	\$7,725	\$15,225
Outreach Lead	\$70,500	1.00	3%	0.03	\$2,000	\$72,615	1.00	3%	0.03	\$2,060	\$4,060
Grants Manager	\$85,000	1.00	13%	0.13	\$11,050	\$87,550	1.00	13%	0.13	\$11,382	\$22,432
				-					-		
TOTALS	\$1,413,424	13.60	5.23	4.87	\$490,483	\$1,455,827	13.60	523%	4.87	\$505,198	\$995,681
FRINGE BENEFIT RATE	24%					24%					
EMPLOYEE FRINGE BENEFITS					\$117,716					\$121,247	\$238,963
TOTAL SALARIES & BENEFITS					\$608,199					\$626,445	\$1,234,644

HSA Budget Form (3/24)

**Grantee: Legal Assistance to the Elderly
Program: Legal Services for Older Adults**

Appendix B, Page 3

Operating Expenses Detail

Expenditure Category	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/24 - 6/30/26
	Original	Original	Total
Rental of Property	\$35,024	\$36,075	\$71,099
Utilities(Elec, Water, Gas, Phone, Garbage)	\$3,587	\$3,695	\$7,282
Office Supplies, Postage	\$8,537	\$8,794	\$17,331
Building Maintenance Supplies and Repair			
Printing and Reproduction	\$259	\$267	\$526
Insurance	\$7,950	\$8,189	\$16,139
Licenses and Fees	\$1,994	\$2,054	\$4,048
Staff Training	\$1,500	\$1,545	\$3,045
Staff Travel-(Local & Out of Town)	\$1,562	\$1,609	\$3,171
Rental of Equipment	\$732	\$754	\$1,486
Consultant/Subcontractor (\$25,000 & Under)			
DEI Training	\$2,152	\$2,217	\$4,369
IT Support	\$1,200	\$1,236	\$2,436
Database Support	\$1,042	\$1,073	\$2,115
Other			
Cloud Based Services	\$3,946	\$4,064	\$8,010
Meeting Support	\$1,500	\$1,545	\$3,045
Legal Research Resources	\$8,275	\$8,523	\$16,798
Membership dues	\$2,152	\$2,217	\$4,369
Litigation Expenses	\$10,000	\$10,300	\$20,300
Total Operating Expense	\$91,412	\$94,155	\$185,567

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**Effective July 1, 2024 – June 30, 2026****Open Door Legal****Legal Services for Older Adults****I. Purpose**

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder or dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
California State Bar	The State Bar of California, regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	Open Door Legal
HSA	Human Services Agency of the City and County of San Francisco

Legal Assistance	Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
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 participants to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
Older Americans Act	Federal legislation originally signed in 1965 and reauthorized in subsequent years. Creates a nationwide network of services focused on older adults.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform participant 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 participants they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

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

- Persons with low income

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) An older adult aged 60 years or older *and*
- 3) In need of legal services

V. Location and Time of Services

Grantee services under this agreement are offered at the following Open Door Legal office locations:

- 4634 3rd Street, San Francisco, CA 94124
- 60 Ocean Avenue, San Francisco, CA 94112
- 1113 Fillmore Street, San Francisco, CA 94115

Offices are open Monday through Friday from 10 am – 4 pm, closed Noon – 1 pm. Closed for holidays.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to older adults, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client's independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder/dependent abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the

provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder/Dependent Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least **46** unduplicated clients.
- 2) Grantee will provide at least **1,305** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
- B. Grantee will enter into the SF DAS GetCare database all units of service by the 5th working day of the month for the preceding month.
- C. 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.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.

- F. Grantee will develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee program staff will complete an elder abuse mandated reporter training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.
- I. Grantee will 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.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

Community Focal Point	District	Address
Richmond Senior Center	1	6221 Geary Blvd, 94121
Aquatic Park Senior Center	2	890 Beach Street, 94109
Geen Mun Senior Center	3	777 Stockton St, 94108
South Sunset Activity Center	4	2601 40 th Ave, 94116
Western Addition Senior Center	5	1390 ½ Turk Street, 94115
Downtown Senior Center	5	481 O’Farrell St, 94102
Canon Kip Senior Center	6	705 Natoma, 94103
West Portal Clubhouse	7	131 Lenox Way, 94127
30th Street Senior Center (On Lok)	8	225 30th St, 94131
Mission Neighborhood Centers	9	362 Capp St, 94110
Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102
Toolworks	Disability Focus	22 Battery Street, Suite 300, 94111
DAS Benefits and Resources Hub	Citywide	2 Gough, 94103

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

Jason Chommanard
 Contracts Manager/HSA
 P.O. Box 7988
 San Francisco, CA 94120

Michael Zaugg
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120

jason.chommanard@sfgov.orgmichael.zaugg@sfgov.org

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee: Open Door Legal		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Older Adults		Effective Date:	
New <input 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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$81,600	\$84,120	\$165,720
Operating-Direct	\$14,870	\$15,250	\$30,120
Subtotal	\$96,470	\$99,370	\$195,840
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$14,477	\$14,906	\$29,383
CODB Eligible Expenses	\$110,947	\$114,276	\$225,223
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$110,947	\$114,276	\$225,223
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$110,947	\$114,276	\$225,223
Grantee Revenues			
Total Grantee Revenues			
Total Revenues	\$110,947	\$114,276	\$225,223
Prepared by: Marisol Gutierrez, May 17, 2024			
<i>Telephone No. & Email: 4157354124</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: Open Door Legal											Appendix B, Page 2	
Program: Legal Services for Older Adults												
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	
	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	
Senior Elder Law Attorney	\$99,000	1.00	6%	0.06	\$6,200	\$101,970	1.00	6%	0.06	\$6,300	\$12,500	
Family Law Attorney	\$88,500	1.00	3%	0.03	\$2,400	\$91,155	1.00	3%	0.03	\$2,500	\$4,900	
Elder Law Legal Secretary	\$87,700	1.00	8%	0.08	\$6,900	\$90,331	1.00	8%	0.08	\$7,000	\$13,900	
Managing Family Law Attorney	\$109,000	1.00	3%	0.03	\$3,000	\$112,270	1.00	3%	0.03	\$3,100	\$6,100	
Community Law Attorney	\$87,000	1.00	6%	0.06	\$5,600	\$89,610	1.00	6%	0.06	\$5,700	\$11,300	
Senior Employment Litigation Attorney	\$100,100	1.00	1%	0.01	\$1,000	\$103,103	1.00	1%	0.01	\$1,100	\$2,100	
Managing Civil Litigation Attorney	\$108,000	1.00	3%	0.03	\$2,700	\$111,240	1.00	3%	0.03	\$2,800	\$5,500	
Housing Attorney	\$86,900	1.00	7%	0.07	\$5,700	\$89,507	1.00	6%	0.06	\$5,800	\$11,500	
Managing Housing Attorney	\$106,000	1.00	3%	0.03	\$2,700	\$109,180	1.00	3%	0.03	\$2,800	\$5,500	
Staff Attorney	\$90,000	1.00	6%	0.06	\$5,800	\$92,700	1.00	6%	0.06	\$5,900	\$11,700	
Paralegals	\$86,000	1.00	3%	0.03	\$3,000	\$88,580	1.00	3%	0.03	\$3,100	\$6,100	
Advocates	\$80,000	1.00	6%	0.06	\$5,000	\$82,400	1.00	6%	0.06	\$5,100	\$10,100	
Director of Legal Services	\$149,500	1.00	3%	0.03	\$4,000	\$153,985	1.00	3%	0.03	\$4,100	\$8,100	
Frontline Team	\$80,000	2.00	14%	0.29	\$11,400	\$82,400	2.00	15%	0.29	\$12,000	\$23,400	
Talent Coordinator	\$79,500	1.00	2%	0.02	\$1,300	\$81,885	1.00	2%	0.02	\$1,400	\$2,700	
Volunteer Coordinator	\$83,000	1.00	2%	0.02	\$1,300	\$85,490	1.00	2%	0.02	\$1,400	\$2,700	
				-					-			
TOTALS	\$1,520,200	17.00	0.75	0.89	\$68,000	\$1,565,806	17.00	75%	0.90	\$70,100	\$138,100	
FRINGE BENEFIT RATE	20%					20%						
EMPLOYEE FRINGE BENEFITS					\$13,600					\$14,020	\$27,620	
TOTAL SALARIES & BENEFITS					\$81,600					\$84,120	\$165,720	

HSA Budget Form (3/24)

Grantee: Open Door Legal **Appendix B, Page 3**
Program: Legal Services for Older Adults

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/24 - 6/30/26 Total
<u>Expenditure Category</u>			
Rental of Property	\$4,000	\$4,050	\$8,050
Utilities(Elec, Water, Gas, Phone, Garbage)	\$1,200	\$1,250	\$2,450
Office Supplies, Postage	\$1,000	\$1,050	\$2,050
Building Maintenance Supplies and Repair			
Printing and Reproduction			
Insurance	\$1,500	\$1,550	\$3,050
Staff Training	\$800	\$800	\$1,600
Staff Travel-(Local & Out of Town)	\$570	\$650	\$1,220
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
<u>Other</u>			
Design & Translation Fees	\$1,500	\$1,550	\$3,050
Software	\$2,800	\$2,800	\$5,600
Court Filing & Litigation Fees	\$1,500	\$1,550	\$3,050
<u>Total Operating Expense</u>	\$14,870	\$15,250	\$30,120

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**Effective July 1, 2024 – June 30, 2026****UC Law – San Francisco
Medical Legal Partnership for Seniors****Legal Services for Older Adults****I. Purpose**

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder/dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
California State Bar	The State Bar of California, regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	UC Law San Francisco – Medical Legal Partnership for Seniors

HSA	Human Services Agency of the City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to older individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
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 participants to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
Older Americans Act	Federal legislation originally signed in 1965 and reauthorized in subsequent years. Creates a nationwide network of services focused on older adults.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform participant 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 participants they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

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

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) An older adult aged 60 years or older *and*
- 3) In need of legal services

V. Location and Time of Services

Services will be based at Grantee’s offices 333 Golden Gate Avenue, Floor 4, San Francisco, CA 94102. Services are offered Monday through Friday 9 am – 5 pm except for holidays. Additional off-site services will be offered at times and locations to be determined.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to older adults, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client’s independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder/dependent abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging’s California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder or Dependent Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least 157 unduplicated clients.
- 2) Grantee will provide at least 1,800 units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
- B. Grantee will enter into the SF DAS GetCare database all units of service by the 5th working day of the month for the preceding month.
- C. 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.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- F. Grantee will develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee program staff will complete an elder abuse mandated reporter training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.

- I. Grantee will 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.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

Community Focal Point	District	Address
Richmond Senior Center	1	6221 Geary Blvd, 94121
Aquatic Park Senior Center	2	890 Beach Street, 94109
Geen Mun Senior Center	3	777 Stockton St, 94108
South Sunset Activity Center	4	2601 40 th Ave, 94116
Western Addition Senior Center	5	1390 ½ Turk Street, 94115
Downtown Senior Center	5	481 O’Farrell St, 94102
Canon Kip Senior Center	6	705 Natoma, 94103
West Portal Clubhouse	7	131 Lenox Way, 94127
30th Street Senior Center (On Lok)	8	225 30th St, 94131
Mission Neighborhood Centers	9	362 Capp St, 94110
Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102
Toolworks	Disability Focus	22 Battery Street, Suite 300, 94111
DAS Benefits and Resources Hub	Citywide	2 Gough, 94103

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

Rocio Duenas
 Contracts Manager/HSA
 P.O. Box 7988
 San Francisco, CA 94120
 rocio.duenas@sfgov.org

Michael Zaugg
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120
 michael.zaugg@sfgov.org

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Grantee: UC College of the Law, San Francisco (formerly UC)		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Older Adults		Effective Date:	
New <input 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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$152,871	\$152,871	\$305,742
Operating-Direct	\$8,066	\$11,427	\$19,493
Subtotal	\$160,937	\$164,298	\$325,235
Indirect Percentage (%)	12%	13%	14%
Indirect Costs (Line 16 X Line 15)	\$19,313	\$21,360	\$40,673
COB Eligible Expenses	\$180,250	\$185,658	\$365,908
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$180,250	\$185,658	\$365,908
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$180,250	\$185,658	\$365,908
Grantee Revenues			
UC Law SF - In Kind	\$41,658	\$41,658	\$83,316
UCSF Subgrant - GWEP	\$25,000	\$25,000	\$50,000
UCSF Subgrant - DCA	\$78,927		\$78,927
UCSF Subgrant - CAPCT	\$87,523	\$106,175	\$193,698
Total Grantee Revenues	\$233,108	\$172,833	\$405,941
Total Revenues	\$413,358	\$358,491	\$771,849
Prepared by:			
Telephone No. & Email:		HSA Budget Form (3/24)	

Grantee: UC College of the Law, San Francisco (formerly UC Hastings College of the Law) Appendix B, Page 2
 Program: Legal Services for Older Adults

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
Managing Attorney	\$92,419	1.00	100.00%	1.00	\$92,419	\$92,419	1.00	100%	1.00	\$92,419	\$184,838
Legal Fellow	\$80,000	1.00	20.00%	0.20	\$16,000	\$80,000	1.00	20%	0.20	\$16,000	\$32,000
				-					-		
				-					-		
				-					-		
				-					-		
				-					-		
TOTALS	\$172,419	2.00	1.20	1.20	\$108,419	\$172,419	2.00	120%	1.20	\$108,419	\$216,838
FRINGE BENEFIT RATE	41%					41%					
EMPLOYEE FRINGE BENEFITS					\$44,452					\$44,452	\$88,904
TOTAL SALARIES & BENEFITS					\$152,871					\$152,871	\$305,742

HSA Budget Form (3/24)

Grantee: UC College of the Law, San Francisco (formerly UC Hastings College of the Law) Appendix B, Page 3
Program: Legal Services for Older Adults

Operating Expenses Detail

	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/24 - 6/30/26
Expenditure Category	Original	Original	Total
Office Supplies, Postage	\$1,381	\$3,721	\$5,102
Building Maintenance Supplies and Repair			
Printing and Reproduction	\$1,520	\$1,297	\$2,817
Insurance	\$1,317	\$1,317	\$2,634
Licenses and Fees	\$1,348	\$2,022	\$3,370
Staff Training		\$570	\$570
Staff Travel	\$2,500	\$2,500	\$5,000
Rental of Equipment			
Consultant/Subcontractor (\$25,000 & Under)			
Other			
Total Operating Expense	\$8,066	\$11,427	\$19,493

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**Effective July 1, 2024 – June 30, 2026****Nihonmachi Legal Outreach dba Asian Pacific Islander Legal Outreach****Legal Services for Younger Adults with a Disability****I. Purpose**

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder or dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
California State Bar	The State Bar of California, regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	Nihonmachi Legal Outreach dba Asian Pacific Islander Legal Outreach
HSA	Human Services Agency of the City and County of San Francisco

Legal Assistance	Legal advice and representation provided by an attorney to individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
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 participants to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
Older Americans Act	Federal legislation originally signed in 1965 and reauthorized in subsequent years. Creates a nationwide network of services focused on older adults.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform participant 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 participants they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

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

- Persons with low income

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) A younger adult with a disability, ages 18-59, *and*
- 3) In need of legal services

V. Location and Time of Services

Services will be based at Grantee’s offices, 1121 Mission Street, San Francisco, CA 94103. Offices are open Monday through Friday 9 am – 5 pm except holidays.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to adults with a disability, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client’s independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging’s California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities

- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder/Dependent Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
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- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with people with disabilities. Grantee is expected to keep up with changes in the law that affect this population, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least **61** unduplicated clients.
- 2) Grantee will provide at least **1,425** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
- B. Grantee will enter into the SF DAS GetCare database all units of service by the 5th working day of the month for the preceding month.
- C. 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.
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- G. Grantee program staff will complete an elder abuse mandated reporter training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.
- I. Grantee will 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.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these

Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

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30th Street Senior Center (On Lok)	8	225 30th St, San Francisco, 94131
Mission Neighborhood Centers	9	362 Capp St, 94110
Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102
Toolworks	Disability Focus	22 Battery St, Suite 300, 94108
DAS Benefits and Resources Hub	Citywide	2 Gough St, San Francisco, 94103

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

Emmy Miller
Contracts Manager/HSA
P.O. Box 7988
San Francisco, CA 94120
emmy.miller@sfgov.org

Michael Zaugg
DAS, Office of Community Partnerships
P.O. Box 7988
San Francisco, CA 94120
michael.zaugg@sfgov.org

XI. Monitoring Activities

A. **Program Monitoring:** Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee: Nihonmachi dba API Legal Outreach		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Young Adults with Disabilities		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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$99,054	\$99,054	\$198,108
Operating-Direct	\$23,651	\$27,332	\$50,983
Subtotal	\$122,705	\$126,386	\$249,091
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$18,406	\$18,957	\$37,362
COB Eligible Expenses	\$141,111	\$145,343	\$286,453
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$141,111	\$145,343	\$286,453
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$141,110	\$145,343	\$286,453
Grantee Revenues			
Total Grantee/Contractor Revenues			
Total Revenues	\$141,110	\$145,343	\$286,453
Prepared by: Ted Tang			
<i>Telephone No. & Email:</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: Nihonmachi dba API Legal Outreach Appendix B, Page 2
 Program: Legal Services for Young Adults with Disabilities

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		
	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		
Managing Attorney	\$130,000	0.10	100%	0.10	\$13,000	\$130,000	0.10	100%	0.10	\$13,000	\$26,000		
Supervising Attorney	\$85,592	0.25	100%	0.25	\$21,398	\$85,592	0.25	100%	0.25	\$21,398	\$42,796		
Staff Attorney(s)	\$72,426	0.35	100%	0.35	\$25,349	\$72,426	0.35	100%	0.35	\$25,349	\$50,698		
Legal Assistant / Case Manager	\$65,790	0.25	100%	0.25	\$16,448	\$65,790	0.25	100%	0.25	\$16,448	\$32,896		
				-					-				
				-					-				
				-					-				
				-					-				
				-					-				
				-					-				
TOTALS	\$353,808	0.95	4.00	0.95	\$76,195	\$353,808	0.95	400%	0.95	\$76,195	\$152,390		
FRINGE BENEFIT RATE	30%											30%	
EMPLOYEE FRINGE BENEFITS					\$22,859					\$22,859	\$45,718		
TOTAL SALARIES & BENEFITS					\$99,054					\$99,054	\$198,108		

HSA Budget Form (3/24)

Grantee: Nihonmachi dba API Legal Outreach **Appendix B, Page 3**
Program: Legal Services for Young Adults with Disabilities

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/24 - 6/30/26 Total
<u>Expenditure Category</u>			
Rental of Property			
Utilities(Elec, Water, Gas, Phone, Garbage)	\$3,500	\$4,100	\$7,600
Office Supplies, Postage	\$3,500	\$4,100	\$7,600
Building Maintenance Supplies and Repair	\$3,500	\$4,100	\$7,600
Printing and Reproduction			
Insurance	\$2,500	\$2,900	\$5,400
Staff Training	\$1,500	\$1,700	\$3,200
Staff Travel-(Local & Out of Town)			
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
Audit	\$2,500	\$2,900	\$5,400
<u>Other</u>			
building occupancy: Mortgage Interest	\$6,651	\$7,532	\$14,183
<u>Total Operating Expense</u>	\$23,651	\$27,332	\$50,983

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**Effective July 1, 2024 – June 30, 2026****Independent Living Resource Center – San Francisco****Legal Services for Younger Adults with a Disability****I. Purpose**

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder or dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
California State Bar	The State Bar of California, regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	Independent Living Resource Center – San Francisco
HSA	Human Services Agency of the City and County of San Francisco

Legal Assistance	Legal advice and representation provided by an attorney to individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
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 participants to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
Older Americans Act	Federal legislation originally signed in 1965 and reauthorized in subsequent years. Creates a nationwide network of services focused on older adults.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform participant 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 participants they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

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

- Persons with low income

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) An adult aged 18+ with a disability, *and*
- 3) In need of legal services

V. Location and Time of Services

Services will be based at Grantee’s offices, located at 825 Howard Street, San Francisco, CA 94103. Services are offered Monday through Friday 9 am – 4:30 pm. Closed for holidays.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to adults with a disability, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client’s independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging’s California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities

- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder/Dependent Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with people with disabilities. Grantee is expected to keep up with changes in the law that affect this population, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least **150** unduplicated clients.
- 2) Grantee will provide at least **1,725** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
- B. Grantee will enter into the SF DAS GetCare database all units of service by the 5th working day of the month for the preceding month.
- C. Monthly and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- F. Grantee will develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee program staff will complete an elder abuse mandated reporter training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.
- I. Grantee will 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.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

Community Focal Point	District	Address
Richmond Senior Center	1	6221 Geary Blvd, 94121
Aquatic Park Senior Center	2	890 Beach Street, 94109
Geen Mun Activity Center	3	777 Stockton St, 94108
South Sunset Activity Center	4	2601 40 th Ave, 94116
Western Addition Senior Center	5	1390 ½ Turk Street, 94115
Downtown Senior Center	5	481 O'Farrell St, 94102
Canon Kip Senior Center	6	705 Natoma St, 94103
West Portal Clubhouse	7	131 Lenox Way, 94127
30th Street Senior Center (On Lok)	8	225 30th St, San Francisco, 94131
Mission Neighborhood Centers	9	362 Capp St, 94110
Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102
Toolworks	Disability Focus	22 Battery St, Suite 300, 94108
DAS Benefits and Resources Hub	Citywide	2 Gough St, San Francisco, 94103

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

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

Michael Zaugg
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120
michael.zaugg@sfgov.org

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee: Independent Living Resource Center		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Young Adults with Disabilities		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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$120,010	\$123,611	\$243,621
Operating-Direct	\$39,416	\$40,598	\$80,014
Subtotal	\$159,426	\$164,209	\$323,635
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$23,914	\$24,631	\$48,545
CODB Eligible Expenses	\$183,340	\$188,840	\$372,180
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$183,340	\$188,840	\$372,180
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$183,340	\$188,840	\$372,180
Grantee Revenues			
Total Grantee/Contractor Revenues			
Total Revenues	\$183,340	\$188,840	\$372,180
Prepared by:			
<i>Telephone No. & Email:</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: Independent Living Resource Center Appendix B, Page 2
 Program: Legal Services for Young Adults with Disabilities

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
Attorney	\$86,889	1.00	100%	1.00	\$86,889	\$89,496	1.00	100%	1.00	\$89,496	\$176,385
Administrative Director	\$75,942	0.01	100%	0.01	\$759	\$78,220	0.01	100%	0.01	\$782	\$1,541
Executive Director	\$136,818	0.01	100%	0.01	\$1,368	\$140,923	0.01	100%	0.01	\$1,409	\$2,777
Legal and Housing Assistant	\$67,771	0.15	100%	0.15	\$10,166	\$69,804	0.15	100%	0.15	\$10,471	\$20,637
				-					-		
				-					-		
				-					-		
				-					-		
				-					-		
				-					-		
TOTALS	\$367,420	1.17	4.00	1.17	\$99,182	\$378,443	1.17	400%	1.17	\$102,158	\$201,340
FRINGE BENEFIT RATE	21%						21%				
EMPLOYEE FRINGE BENEFITS					\$20,828					\$21,453	\$42,281
TOTAL SALARIES & BENEFITS					\$120,010					\$123,611	\$243,621

HSA Budget Form (3/24)

Grantee: Independent Living Resource Center **Appendix B, Page 3**
Program: Legal Services for Young Adults with Disabilities

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/24 - 6/30/26 Total
<u>Expenditure Category</u>			
Rental of Property	\$16,000	\$16,000	\$32,000
Utilities(Elec, Water, Gas, Phone, Garbage)	\$3,200	\$3,200	\$6,400
Office Supplies, Postage	\$866	\$900	\$1,766
Building Maintenance Supplies and Repair	\$600	\$600	\$1,200
Printing and Reproduction	\$200	\$200	\$400
Insurance	\$11,600	\$11,600	\$23,200
Staff Training	\$500	\$800	\$1,300
Staff Travel-(Local & Out of Town)	\$200	\$500	\$700
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
Translation Services	\$1,400	\$1,400	\$2,800
IT Support	\$700	\$700	\$1,400
Other Miscellaneous Shared Services	\$200	\$400	\$600
<u>Other</u>			
Dues and Subscriptions	\$3,900	\$4,248	\$8,148
Food for client meetings	\$50	\$50	\$100
<u>Total Operating Expense</u>	\$39,416	\$40,598	\$80,014

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**Effective July 1, 2024 – June 30, 2026****La Raza Centro Legal****Legal Services for Younger Adults with a Disability****I. Purpose**

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder/dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
California State Bar	The State Bar of California, regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	La Raza Centro Legal
HSA	Human Services Agency of the City and County of San Francisco

Legal Assistance	Legal advice and representation provided by an attorney to individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
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 participants to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
Older Americans Act	Federal legislation originally signed in 1965 and reauthorized in subsequent years. Creates a nationwide network of services focused on older adults.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform participant 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 participants they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

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

- Persons with low income

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) A younger adult with a disability, ages 18-59, *and*
- 3) In need of legal services

V. Location and Time of Services

Services will be based at Grantee's offices, 474 Valencia Street, Suite 295, San Francisco 94110. Offices are open Monday through Friday 9 am – Noon, 1 pm – 5 pm. Closed for holidays.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to adults with a disability, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client's independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder/dependent abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder or Dependent Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with people with disabilities. Grantee is expected to keep up with changes in the law that affect this population, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least **38** unduplicated clients.
- 2) Grantee will provide at least **465** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
- B. Grantee will enter into the SF DAS GetCare database all units of service by the 5th working day of the month for the preceding month.
- C. Monthly and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- F. Grantee will develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee program staff will complete an elder abuse mandated reporter training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.

- I. Grantee will 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.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

Community Focal Point	District	Address
Richmond Senior Center	1	6221 Geary Blvd, 94121
Aquatic Park Senior Center	2	890 Beach Street, 94109
Geen Mun Activity Center	3	777 Stockton St, 94108
South Sunset Activity Center	4	2601 40 th Ave, 94116
Western Addition Senior Center	5	1390 ½ Turk Street, 94115
Downtown Senior Center	5	481 O’Farrell St, 94102
Canon Kip Senior Center	6	705 Natoma St, 94103
West Portal Clubhouse	7	131 Lenox Way, 94127
30th Street Senior Center (On Lok)	8	225 30th St, San Francisco, 94131
Mission Neighborhood Centers	9	362 Capp St, 94110
Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102
Toolworks	Disability Focus	22 Battery St, Suite 300, 94108
DAS Benefits and Resources Hub	Citywide	2 Gough St, San Francisco, 94103

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

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

Michael Zaugg
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120
 michael.zaugg@sfgov.or

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee: La Raza Centro Legal		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Young Adults with Disabilities		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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$32,170	\$33,140	\$65,310
Operating-Direct	\$1,194	\$1,225	\$2,419
Subtotal	\$33,364	\$34,365	\$67,729
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$5,004	\$5,154	\$10,158
COB Eligible Expenses	\$38,368	\$39,519	\$77,887
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$38,368	\$39,519	\$77,887
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$38,368	\$39,519	\$77,887
Grantee/Contractor Revenues			
Total Grantee/Contractor Revenues			
Total Revenues	\$38,368	\$39,519	\$77,887
Prepared by:			
<i>Telephone No. & Email:</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: La Raza Centro Legal Appendix B, Page 2
 Program: Legal Services for Young Adults with Disabilities

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
Legal Director	\$110,300	0.14	100%	0.14	\$15,431	\$113,600	0.14	100%	0.14	\$15,893	\$31,324
Legal Assistant	\$63,850	0.14	100%	0.14	\$8,933	\$65,800	0.14	100%	0.14	\$9,205	\$18,138
Admin Assistant	\$68,600	0.02	100%	0.02	\$1,372	\$70,700	0.02	100%	0.02	\$1,414	\$2,786
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TOTALS	\$242,750	0.30	3.00	0.30	\$25,736	\$250,100	0.30	300%	0.30	\$26,512	\$52,248
FRINGE BENEFIT RATE	25%						25%				
EMPLOYEE FRINGE BENEFITS					\$6,434					\$6,628	\$13,062
TOTAL SALARIES & BENEFITS					\$32,170					\$33,140	\$65,310

HSA Budget Form (3/24)

Grantee: La Raza Centro Legal

Appendix B, Page 3

Program: Legal Services for Young Adults with Disabilities

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/24 - 6/30/26 Total
<u>Expenditure Category</u>			
Rental of Property	\$1,070	\$1,092	\$2,162
Utilities(Elec, Water, Gas, Phone, Garbage)			
Office Supplies, Postage			
Building Maintenance Supplies and Repair			
Printing and Reproduction			
Insurance	\$124	\$133	\$257
Staff Training			
Staff Travel-(Local & Out of Town)			
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
<u>Other</u>			
<u>Total Operating Expense</u>	\$1,194	\$1,225	\$2,419

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Effective July 1, 2024 – June 30, 2026

LEGAL ASSISTANCE TO THE ELDERLY

Legal Services for Younger Adults with a Disability

I. Purpose

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder or dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
California State Bar	The State Bar of California, regulatory agency for the State’s lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	Legal Assistance to the Elderly (LAE)

HSA	Human Services Agency of the City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
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 participants to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
Older Americans Act	Federal legislation originally signed in 1965 and reauthorized in subsequent years. Creates a nationwide network of services focused on older adults.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform participant 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 participants they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

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

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) A younger adult with a disability, ages 18-59, *and*
- 3) In need of legal services

V. Location and Time of Services

Legal Assistance to the Elderly's offices are located at 1663 Mission Street, Suite 225. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to adults with a disability, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client's independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder or dependent abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with people with disabilities. Grantee is expected to keep up with changes in the law that affect this population, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least **61** unduplicated clients.
- 2) Grantee will provide at least **660** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
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- C. 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.
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- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.
- I. Grantee will 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.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

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Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102
Toolworks	Disability Focus	22 Battery St, Suite 300, 94108
DAS Benefits and Resources Hub	Citywide	2 Gough St, San Francisco, 94103

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

Jason Chommanard
 Contracts Manager/HSA
 P.O. Box 7988
 San Francisco, CA 94120
jason.chommanard@sfgov.org

Katherine Moser
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120
katherine.moser@sfgov.org

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Grantee: Legal Assistance to the Elderly		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Young Adults with Disabilities		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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$53,254	\$54,851	\$108,105
Operating-Direct	\$4,963	\$5,113	\$10,076
Subtotal	\$58,217	\$59,964	\$118,181
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$8,733	\$8,995	\$17,728
COB Eligible Expenses	\$66,950	\$68,959	\$135,909
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$66,950	\$68,959	\$135,909
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$66,950	\$68,959	\$135,909
Grantee/Contractor Revenues			
Fundraising	\$10,000	\$10,000	\$20,000
MOHCD Funding for Tenant Right To Counsel	\$130,000	\$130,000	\$260,000
Total Grantee/Contractor Revenues	\$140,000	\$140,000	\$280,000
Total Revenues	\$206,950	\$208,959	\$415,909
Prepared by: Kitania Folk			
<i>Telephone No. & Email:</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: Legal Assistance to the Elderly **Appendix B, Page 2**
Program: Legal Services for Young Adults with Disabilities

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
Director of Litigation	\$150,000	1.00	1%	0.01	\$2,000	\$154,500	1.00	1%	0.01	\$2,060	\$4,060
Supervising Attorney	\$116,200	1.00	9%	0.09	\$10,575	\$119,686	1.00	9%	0.09	\$10,892	\$21,467
Senior Staff Attorney	\$65,100	0.60	21%	0.12	\$8,030	\$67,053	0.60	21%	0.12	\$8,270	\$16,300
Staff Attorney	\$89,000	1.00	15%	0.15	\$13,253	\$91,670	1.00	15%	0.15	\$13,651	\$26,904
Staff Attorney	\$90,000	1.00	6%	0.06	\$5,000	\$92,700	1.00	6%	0.06	\$5,150	\$10,150
Paralegal	\$74,200	1.00	4%	0.04	\$3,168	\$76,426	1.00	4%	0.04	\$3,263	\$6,431
Grants Manager	\$85,000	1.00	1%	0.01	\$921	\$87,550	1.00	1%	0.01	\$949	\$1,870
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TOTALS	\$669,500	6.60	0.57	0.49	\$42,947	\$689,585	6.60	57%	0.49	\$44,235	\$87,182
FRINGE BENEFIT RATE	24%					24%					
EMPLOYEE FRINGE BENEFITS					\$10,307					\$10,616	\$20,923
TOTAL SALARIES & BENEFITS					\$53,254					\$54,851	\$108,105

HSA Budget Form (3/24)

Grantee: Legal Assistance to the Elderly **Appendix B, Page 3**
Program: Legal Services for Young Adults with Disabilities

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/24 - 6/30/26 Total
<u>Expenditure Category</u>			
Rental of Property	\$2,123	\$2,186	\$4,309
Utilities(Elec, Water, Gas, Phone, Garbage)	\$178	\$183	\$361
Office Supplies, Postage	\$345	\$357	\$702
Building Maintenance Supplies and Repair			
Printing and Reproduction	\$15	\$20	\$35
Insurance	\$450	\$475	\$925
Staff Training	\$257	\$260	\$517
Staff Travel-(Local & Out of Town)	\$113	\$115	\$228
Rental of Equipment	\$173	\$178	\$351
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
IT Support	\$204	\$204	\$408
DEI Consultant	\$173	\$175	\$348
<u>Other</u>			
Legal Research Resources	\$369	\$380	\$749
Data Base Support	\$44	\$44	\$88
Cloud Based Services	\$275	\$283	\$558
Meeting Support	\$178	\$183	\$361
State Bar Dues	\$66	\$70	\$136
<u>Total Operating Expense</u>	\$4,963	\$5,113	\$10,076

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**Effective July 1, 2024 – June 30, 2026****Open Door Legal****Legal Services for Younger Adults with a Disability****I. Purpose**

Legal services programs help people with a variety of legal issues including benefit appeals, eviction prevention, consumer fraud/issues, elder or dependent abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal interventions in any of these areas are critical to maintaining independence, safety, and wellbeing.

II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
California State Bar	The State Bar of California, regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
DAS	Department of Disability and Aging Services
Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
Grantee	Open Door Legal
HSA	Human Services Agency of the City and County of San Francisco

Legal Assistance	Legal advice and representation provided by an attorney to individuals with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a nonlawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
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 participants to self-identify their income status, not to be used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior
Older Americans Act	Federal legislation originally signed in 1965 and reauthorized in subsequent years. Creates a nationwide network of services focused on older adults.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform participant 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 participants they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

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

- Persons with low income

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

IV. Client Eligibility

To be eligible for services, clients must be:

- 1) A resident of San Francisco *and*
- 2) A younger adult with a disability, ages 18-59, *and*
- 3) In need of legal services

V. Location and Time of Services

Grantee services under this agreement are offered at the following Open Door Legal office locations:

- 4634 3rd Street, San Francisco, CA 94124
- 60 Ocean Avenue, San Francisco, CA 94112
- 1113 Fillmore Street, San Francisco, CA 94115

Offices are open Monday through Friday from 10 am – 4 pm, closed Noon – 1 pm. Closed for holidays.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which are relevant to adults with a disability, with a focus on the target populations listed in this document. Legal issues to be prioritized are those essential to supporting a client's independence, safety, and wellbeing. Legal service providers will often work in conjunction with other non-legal service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) Information and Referral – the concern is more appropriately referred to another service for assistance
- 2) Advise and Close – the legal issue is very easily addressed, advice is provided and the case is closed
- 3) Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) Case Acceptance – the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder/dependent abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the

provision of Older Americans Act (OAA) legal services. While non-binding, the guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) Income/Nutrition: Supplemental Security Income (“SSI”), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) Healthcare: Medi-Cal, Medicare, managed care, provider/services access, private insurance
- 5) Protective Services/Elder/Dependent Abuse/Defense against Conservatorship: Conservatorship issues with a focus on defending persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with people with disabilities. Grantee is expected to keep up with changes in the law that affect this population, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

On an annual basis:

- 1) Grantee will serve at least **23** unduplicated clients.
- 2) Grantee will provide at least **525** units of service of Legal Assistance. A unit is one hour of Legal Assistance.

IX. Outcome Objectives

Grantee will participate in a standardized outcome reporting process which will be completed at the time each legal case is closed. This reporting process utilizes a series of standardized selections, built into the SF DAS GetCare reporting system, and linked to each client record.

First selection is “Case Closure Type” and includes a list of legal issue areas to choose from such as Housing, Immigration, or Income Maintenance. A second selection to be made is “Case Closure Outcome” and includes a subset of outcomes to choose from such as “obtained or preserved access to housing” or “enforced rights to safe and habitable housing.” These selections were developed in part by the State Bar of California and serve as the basis for this reporting framework. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services providers.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

X. Reporting Requirements

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

- A. Grantee will record the enrollment of eligible participants into the program funded through this contract agreement by entering participant data obtained from participants into the SF DAS GetCare database. This will include SOGI data.
- B. Grantee will enter into the SF DAS GetCare database all units of service by the 5th working day of the month for the preceding month.
- C. 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.
- D. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- E. Grantee will issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.

- F. Grantee will develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee program staff will complete an elder abuse mandated reporter training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- H. Grantee will develop a grievance policy consistent with DAS-OCP policy memorandum.
- I. Grantee will 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.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults and adults with disabilities connect to services throughout the City. Grantee shall be familiar with these Focal Points and be able to accept referrals from and make referrals to these sites. The Focal Points are:

Community Focal Point	District	Address
Richmond Senior Center	1	6221 Geary Blvd, 94121
Aquatic Park Senior Center	2	890 Beach Street, 94109
Geen Mun Activity Center	3	777 Stockton St, 94108
South Sunset Activity Center	4	2601 40 th Ave, 94116
Western Addition Senior Center	5	1390 ½ Turk Street, 94115
Downtown Senior Center	5	481 O’Farrell St, 94102
Canon Kip Senior Center	6	705 Natoma St, 94103
West Portal Clubhouse	7	131 Lenox Way, 94127
30th Street Senior Center (On Lok)	8	225 30th St, San Francisco, 94131
Mission Neighborhood Centers	9	362 Capp St, 94110
Bayview Senior Connections	10	1753 Carroll Ave, 94124
Geneva Community Center	11	5050 Mission St, Suite C, 94112
Openhouse Bob Ross LGBTQ+ Senior Center	LGBTQ+ Focus	65 Laguna St, 94102
Toolworks	Disability Focus	22 Battery St, Suite 300, 94108
DAS Benefits and Resources Hub	Citywide	2 Gough St, San Francisco, 94103

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

Jason Chommanard
 Contracts Manager/HSA
 P.O. Box 7988
 San Francisco, CA 94120

Michael Zaugg
 DAS, Office of Community Partnerships
 P.O. Box 7988
 San Francisco, CA 94120

jason.chommanard@sfgov.orgmichael.zaugg@sfgov.org

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; participant 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 participants 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, and HIPAA compliance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee: Open Door Legal		Full Term:	7/1/24 - 6/30/26
Program: Legal Services for Young Adults with Disabilities		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	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$32,880	\$33,720	\$66,600
Operating-Direct	\$6,120	\$6,450	\$12,570
Subtotal	\$39,000	\$40,170	\$79,170
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$5,850	\$6,026	\$11,876
CODB Eligible Expenses	\$44,850	\$46,196	\$91,046
Consultant/Subcontractor (\$25,000+)			
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$44,850	\$46,196	\$91,046
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$44,850	\$46,196	\$91,046
Grantee/Contractor Revenues			
Total Grantee/Contractor Revenues			
Total Revenues	\$44,850	\$46,196	\$91,046
Prepared by: Marisol Gutierrez, May 17, 2024			
<i>Telephone No. & Email: 4157354124</i>		<i>HSA Budget Form (3/24)</i>	

Grantee: Open Door Legal											Appendix B, Page 2	
Program: Legal Services for Young Adults with Disabilities												
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	
	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	
Community Law Attorney	\$87,000	1.00	3%	0.03	\$2,500	\$89,610	1.00	3%	0.03	\$3,000	\$5,500	
Senior Employment Litigation Atto	\$100,100	1.00	4%	0.04	\$4,000	\$103,103	1.00	4%	0.04	\$4,000	\$8,000	
Managing Civil Litigation Attorney	\$108,000	1.00	1%	0.01	\$1,300	\$111,240	1.00	1%	0.01	\$1,400	\$2,700	
Housing Attorneys	\$86,900	1.00	5%	0.05	\$4,600	\$89,507	1.00	5%	0.05	\$4,600	\$9,200	
Managing Housing Attorney	\$106,000	1.00	1%	0.01	\$1,300	\$109,180	1.00	1%	0.01	\$1,300	\$2,600	
Staff Attorney	\$90,000	1.00	3%	0.03	\$3,000	\$92,700	1.00	3%	0.03	\$3,000	\$6,000	
Paralegals	\$86,000	1.00	1%	0.01	\$1,200	\$88,580	1.00	1%	0.01	\$1,200	\$2,400	
Advocates	\$80,000	1.00	3%	0.03	\$2,000	\$82,400	1.00	2%	0.02	\$2,000	\$4,000	
Director of Legal Services	\$149,500	1.00	1%	0.01	\$1,600	\$153,985	1.00	1%	0.01	\$1,600	\$3,200	
Frontline Team	\$80,000	2.00	6%	0.12	\$4,800	\$82,400	2.00	6%	0.12	\$4,900	\$9,700	
Talent Coordinator	\$79,500	1.00	1%	0.01	\$550	\$81,885	1.00	1%	0.01	\$550	\$1,100	
Volunteer Coordinator	\$83,000	1.00	1%	0.01	\$550	\$85,490	1.00	1%	0.01	\$550	\$1,100	
				-					-			
TOTALS	\$1,136,000	13.00	0.30	0.36	\$27,400	\$1,170,080	13.00	30%	0.36	\$28,100	\$55,500	
FRINGE BENEFIT RATE	20%						20%					
EMPLOYEE FRINGE BENEFITS					\$5,480					\$5,620	\$11,100	
TOTAL SALARIES & BENEFITS					\$32,880					\$33,720	\$66,600	

HSA Budget Form (3/24)

Grantee: Open Door Legal **Appendix B, Page 3**
Program: Legal Services for Young Adults with Disabilities

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/24 - 6/30/26 Total
<u>Expenditure Category</u>			
Rental of Property	\$1,600	\$1,700	\$3,300
Utilities(Elec, Water, Gas, Phone, Garbage)	\$500	\$550	\$1,050
Office Supplies, Postage	\$400	\$450	\$850
Building Maintenance Supplies and Repair			
Printing and Reproduction			
Insurance	\$600	\$600	\$1,200
Staff Training	\$450	\$450	\$900
Staff Travel-(Local & Out of Town)	\$270	\$300	\$570
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
<u>Other</u>			
Telecommunication	\$600	\$650	\$1,250
Software	\$1,100	\$1,150	\$2,250
Court Filing & Litigation Fees	\$600	\$600	\$1,200
<u>Total Operating Expense</u>	\$6,120	\$6,450	\$12,570

HSA Budget Form (3/24)