



**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](http://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, JANUARY 8, 2025 DS  
EB

**SUBJECT:** NEW GRANT: **MULTIPLE GRANTEES (NON-PROFIT)** TO PROVIDE SUPPORT CIRCLE PROGRAMS

**GRANT TERM:** 1/1/2025 - 12/31/2026

**GRANT AMOUNT:**

<u>New</u>	<u>Contingency</u>	<u>Total</u>
\$60,000	\$6,000	\$66,000

**ANNUAL AMOUNT:** See table below

<b>Funding Source:</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$60,000			\$6,000	\$66,000
<b>PERCENTAGE:</b>	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into grant agreements with multiple grantees for the period of January 1, 2025 through December 31, 2026, in an amount of \$60,000, plus a 10% contingency for a total amount not to exceed \$66,000. The purpose of the grants is to provide "Support Circle" Programs.

**Support Circle Programs**

<b>Suppliers</b>	<b>FY 24-25</b>	<b>FY 25-26</b>	<b>FY 26-27</b>	<b>Total Contract Amount</b>	<b>10% Contingency</b>	<b>Not-to-Exceed</b>
Golden Gate Senior Services	\$5,000	\$10,000	\$5,000	\$20,000	\$2,000	\$22,000
NEXT Village SF	\$5,000	\$10,000	\$5,000	\$20,000	\$2,000	\$22,000
SteppingStone (North and South of Market Adult Day Health)	\$5,000	\$10,000	\$5,000	\$20,000	\$2,000	\$22,000
	<b>\$15,000</b>	<b>\$30,000</b>	<b>\$15,000</b>	<b>\$60,000</b>	<b>\$6,000</b>	<b>\$66,000</b>

**Background**

San Francisco’s Department of Disability and Aging Services (DAS) funds multiple community-based organizations to provide Community Center, Village, and Community Connector programs. These programs are part of the “Connection and Engagement” programs area, designed to provide opportunities to socialize, build community, and participate in a meaningful way in their community. At the program level, this might mean exercise classes, educational events, and organized trips.

Staff at these program sites serve as critical links for clients, but often do not have the clinical background (or the time capacity) to provide support around the negative mental health consequences of social isolation, loneliness, and other challenges older adults and adults with disabilities face in their lives.

Through this procurement, DAS recognizes this need and seeks to fund multiple short-term pilot programs tentatively called the “Support Circle” program model. These programs will be open programs, allowing participants to join as they are comfortable.

**Services to be Provided**

Through a request for proposals process, three grantees were identified. Each grantee will coordinate and host regularly scheduled groups facilitated by licensed professionals. Current facilitators are two licensed clinical social workers (LCSW) and one licensed marriage and family therapist (LMFT).

Planned topics among the three programs include: anxiety and depression, mindfulness, managing chronic health conditions, navigating solo aging, caregiver support, social isolation, healthy relationships, and lasting impacts of discrimination. Grantee SteppingStone’s support circle program will focus on LGBTQ+ clients.

Through the pilot phase, DAS staff will measure program performance and impacts. Information gathered during this initial phase will help inform DAS (and community providers) about the demand for and effectiveness of these programs.

**Selection**

Grantees were selected through Request for Proposals # 1141, which was competitively bid in September 2024.

**Funding**

Funding for this grant/contract is provided through County General Funds.

**ATTACHMENTS**

**Golden Gate Senior Services**

Appendix A – Services to be Provided

Appendix B – Budget

**NEXT Village SF**

Appendix A – Services to be Provided

Appendix B – Budget

**SteppingStone (North and South of Market Adult Day Health)**

Appendix A – Services to be Provided

Appendix B – Budget

**Appendix A – Services to be Provided  
 Golden Gate Senior Services – Richmond Senior Center  
 Support Circle – Program Pilot  
 January 1, 2025 – December 31, 2026**

**I. Purpose**

The purpose of this grant is to provide social programming supporting the mental and emotional health of older adults and adults with disabilities.

**II. Definitions**

Adult with a Disability	A person 18 years of age or older 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.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services.
Dignity Fund	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAS will expend monies in the Fund solely to help seniors and

	adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities. <a href="https://www.sfhsa.org/about/departments/department-aging-and-adult-services-daas/dignity-fund">https://www.sfhsa.org/about/departments/department-aging-and-adult-services-daas/dignity-fund</a>
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Grantee	Golden Gate Senior Services – Richmond Senior Center
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person’s primary language.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
OCP	Office of Community Partnerships.
Older Adult	Person who is 60 years of age or older; used interchangeably with “senior.”
Senior	Person who is 60 years of age or older; used interchangeably with the “older adult.”
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data

	concerning the sexual orientation and gender identity of the clients(consumers) they serve. (Chapter 104, Sections 104.1 through 104.9).
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**III. Target Population**

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

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

**IV. Eligibility for Program Participation**

To be eligible for services, clients must be:

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

**V. Description of Services**

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

- 1) Grantee will plan and host group meetings designed to address and support the emotional and mental health of participants at DAS funded Community Service programs. Meetings shall be designed to be a balance of informal, social discussions and more formalized guided support. Meetings shall be led by a facilitator with appropriate professional skills and experience.
- 2) Program facilitation / staffing requirements: Staff leading the Support Circle meetings shall be licensed professionals. Licensure should be from psychology, counseling, social work, or a related field. Acceptable examples are LCSW, PsyD, MFT. If grantee intends to have services facilitated by a licensure not listed above, please contact DAS-OCP analyst for approval in advance of services.
- 3) Grantee shall ensure that services are hosted in a welcoming, inclusive, and accessible environment.
- 4) Grantee shall ensure that program topics are relevant to participant interest and needs. Examples of possible topics include: loneliness and

isolation, grief, trauma, depression and anxiety. Grantee shall utilize existing client feedback pathways to identify and select topics.

- 5) Grantee shall develop and implement an outreach plan to raise awareness of services and to promote participation.
- 6) As dates/times/topics for Support Circle meetings are determined, Grantee shall develop written materials to inform potential participants of meetings and how to attend. Examples might be flyers or monthly calendars.
- 7) Grantee shall develop internal record keeping practices to meet the program guidelines and reporting practices described in this scope of services.

## **VI. Location and Time of Services**

Support Circle programs will be hosted at Grantee's Richmond Senior Center location at 6221 Geary Blvd, San Francisco, CA 94121. Specific dates and times of Support Circle programs shall be submitted to DAS-OCP staff in advance of services.

## **VII. Service Objectives**

- 1) For the period of 1/1/25 – 6/30/25, Grantee shall meet the following service objectives:

Grantee will provide at least **12** sessions of support circle services. A session is one facilitated meeting of the support circle group.

Grantee will provide at least **12** hours of support circle services. An hour of support circle services is one hour of facilitated meeting time of the support circle group.

- 2) For the period for 7/1/25 – 6/30/26, Grantee shall provide the following service objectives:

Grantee will provide at least **24** sessions of support circle services. A session is one facilitated meeting of the support circle group.

Grantee will provide at least **24** hours of support circle services. An hour of support circle services is one hour of facilitated meeting time of the support circle group.

- 3) For the period of 7/1/26 – 12/31/26, Grantee shall meet the following service objectives:

Grantee will provide at least **12** sessions of support circle services. A session is one facilitated meeting of the support circle group.

Grantee will provide at least **12** hours of support circle services. An hour of support circle services is one hour of facilitated meeting time of the support circle group.

## **VIII. Outcome Objectives**

On an annual basis, Grantee will meet the following service objectives:

- 1) Participants feel better able to manage their emotional and/or mental health due to program participation. (Target 85%)
- 2) Participants indicate that discussion topics are appropriate and useful. (Target 85%)
- 3) Participants feel like valued community members due to opportunity to share knowledge, skills, stories, etc. through this program. (Target 85%)
- 4) Participants report they improved or maintained their wellbeing due to program participation. (Target 85%)
- 5) Participants feel safe and welcomed by program staff. (Target 85%)

Outcome objectives shall be measured through the administration of an annual client survey. Based on response rates in the first year of administration, an agreed upon minimum response rate may be established. Additional details on survey administration are described in Section IX, below.

## **IX. Reporting and Other Requirements**

- 1) Grantee will develop an internal tracking system which collects dates, times, participant name, and sign-in for each service offered under this grant. Grantee will submit a sample template of these documents to assigned OCP analyst in advance of the start of services.
- 2) Upon approval of reporting template, Grantee will submit monthly service objectives delivered by the 5<sup>th</sup> working day of the subsequent month. Internal documentation supporting reported service objective deliverables shall be available upon request and during the annual program monitoring process.
- 3) Grantee will send a representative to attend and participate in quarterly provider meetings for Support Circle – Program Pilot providers. Quarterly provider meetings will be scheduled and hosted by DAS-OCP staff.



- 4) Grantee will participate in the hosting of administration of a client survey to be offered to all participants of services funded under this grant. Grantee will participate in the coordination of survey administration by DAS-OCP staff.
- 5) Grantee program staff will complete an Elder Abuse Mandated Reporter Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
- 6) Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- 7) Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- 8) The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules, as applicable.
- 9) For assistance with reporting requirements or submission of reports, contact:

Margarita Gatam  
Contract Manager, Office of Contract Management, SFHSA  
Margarita.Gatam@sfgov.org

*and*

Michael Zaugg  
Program Director, Office of Community Partnerships, DAS  
Michael.Zaugg@sfgov.org

## **X. Monitoring Activities**

- 1) Program Monitoring: Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports, 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; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; board of director list; and whether services are provided appropriately according to Sections III-VII.

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

Name <b>Golden Gate Senior Services</b>		Term Jan 1, 2025 - Dec 31, 2026		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
<b>Program: Support Circles (at Richmond Senior Center/RSC)</b>				
Budget Reference Page No.(s)				(Total)
Program Term	<b>1/1/25-6/30/25</b> (6 months)	<b>7/1/25-6/30/26</b> (12 months)	<b>7/1/26-12/31/26</b> (6 months)	<b>Jan 1, 2025 - Dec 31, 2026</b>
<b>DAS Expenditures</b>				
Salaries & Benefits				
Operating Expenses	\$4,348	\$8,696	\$4,348	\$17,392
<b>Subtotal</b>	<b>\$4,348</b>	<b>\$8,696</b>	<b>\$4,348</b>	<b>\$17,392</b>
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$652	\$1,304	\$652	\$2,608
Capital/Subcontractor Expenditures				
<b>Total DAS Expenditures</b>	<b>\$5,000</b>	<b>\$10,000</b>	<b>\$5,000</b>	<b>\$20,000</b>
<b>DAS Revenue</b>				
General County Fund	\$5,000	\$10,000	\$5,000	\$20,000
<b>Total DAS Revenue</b>	<b>\$5,000</b>	<b>\$10,000</b>	<b>\$5,000</b>	<b>\$20,000</b>
<b>Non DAS Expenditures</b>				
Salaries & Benefits				
Operating Expenses	\$780	\$1,560	\$780	\$3,120
<b>Subtotal</b>				
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$117	\$234	\$117	\$468
<b>Total Non DAS Expenditures</b>	<b>\$897</b>	<b>\$1,794</b>	<b>\$897</b>	<b>\$3,588</b>
<b>Non DAS Revenue</b>				
GGSS - In-Kind (unrestricted)	\$897	\$1,794	\$897	\$3,588
<b>Total Non DAS Revenue</b>	<b>\$897</b>	<b>\$1,794</b>	<b>\$897</b>	<b>\$3,588</b>
<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$5,897</b>	<b>\$11,794</b>	<b>\$5,897</b>	<b>\$23,588</b>
Prepared by: Christine Ness				Date: 10/27/24
HSA-CO Review Signature:				
HSA #1				

<b>Operating Expense Detail</b>				
	1/1/25-6/30/25 (6 months)	7/1/25-6/30/26 (12 months)	7/1/26-12/31/26 (6 months)	(Total) Jan 1, 2025 - Dec 31, 2026
<b>DAS Operating Expenses</b>				
<u>Expenditure Category</u>				
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Licenses and Fees				
Staff Training				
Programs and Events	\$178	\$356	\$178	\$712
Rental of Equipment				
<u>Consultants</u>				
Independent Contractor/Student Assistant (78 hrs per year)	\$1,170	\$2,340	\$1,170	\$4,680
Licensed Therapist Group Facilitator	\$3,000	\$6,000	\$3,000	\$12,000
<b>Total DAS Operating Expenses</b>	<b>\$4,348</b>	<b>\$8,696</b>	<b>\$4,348</b>	<b>\$17,392</b>
<b>Non DAS Operating Expenses</b>				
<u>Consultants</u>				
Independent Contractor/Student Assistant (52 hrs per year)	\$780	\$1,560	\$780	\$3,120
<b>Total Non DAS Operating Expenses</b>	<b>\$780</b>	<b>\$1,560</b>	<b>\$780</b>	<b>\$3,120</b>
<b>HSA #2</b>				

**Appendix A – Services to be Provided  
 NEXT Village SF  
 Support Circle – Program Pilot  
 January 1, 2025 – December 31, 2026**

**I. Purpose**

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**II. Definitions**

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Grantee	NEXT Village SF
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	of the clients(consumers) they serve. (Chapter 104, Sections 104.1 through 104.9).
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- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

**IV. Eligibility for Program Participation**

To be eligible for services, clients must be:

- An older adult aged 60 years or older or
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- A resident of San Francisco

**V. Description of Services**

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

- 1) Grantee will plan and host group meetings designed to address and support the emotional and mental health of participants at DAS funded Community Service programs. Meetings shall be designed to be a balance of informal, social discussions and more formalized guided support. Meetings shall be led by a facilitator with appropriate professional skills and experience.
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- 6) As dates/times/topics for Support Circle meetings are determined, Grantee shall develop written materials to inform potential participants of meetings and how to attend. Examples might be flyers or monthly calendars.
- 7) Grantee shall develop internal record keeping practices to meet the program guidelines and reporting practices described in this scope of services.

## **VI. Location and Time of Services**

Support Circle programs will be hosted at Grantee's service site located at 704 Filbert Street, San Francisco, CA 94133. Specific dates and times of Support Circle programs shall be submitted to DAS-OCP staff in advance of services.

## **VII. Service Objectives**

- 1) For the period of 1/1/25 – 6/30/25, Grantee shall meet the following service objectives:

Grantee will provide at least **18** sessions of support circle services. A session is one facilitated meeting of the support circle group.

Grantee will provide at least **27** hours of support circle services. An hour of support circle services is one hour of facilitated meeting time of the support circle group.

- 2) For the period for 7/1/25 – 6/30/26, Grantee shall provide the following service objectives:

Grantee will provide at least **36** sessions of support circle services. A session is one facilitated meeting of the support circle group.

Grantee will provide at least **54** hours of support circle services. An hour of support circle services is one hour of facilitated meeting time of the support circle group.

- 3) For the period of 7/1/26 – 12/31/26, Grantee shall meet the following service objectives:



Grantee will provide at least **18** sessions of support circle services. A session is one facilitated meeting of the support circle group.

Grantee will provide at least **27** hours of support circle services. An hour of support circle services is one hour of facilitated meeting time of the support circle group.

## **VIII. Outcome Objectives**

On an annual basis, Grantee will meet the following service objectives:

- 1) Participants feel better able to manage their emotional and/or mental health due to program participation. (Target 85%)
- 2) Participants indicate that discussion topics are appropriate and useful. (Target 85%)
- 3) Participants feel like valued community members due to opportunity to share knowledge, skills, stories, etc. through this program. (Target 85%)
- 4) Participants report they improved or maintained their wellbeing due to program participation. (Target 85%)
- 5) Participants feel safe and welcomed by program staff. (Target 85%)

Outcome objectives shall be measured through the administration of an annual client survey. Based on response rates in the first year of administration, an agreed upon minimum response rate may be established. Additional details on survey administration are described in Section IX, below.

## **IX. Reporting and Other Requirements**

- 1) Grantee will develop an internal tracking system which collects dates, times, participant name, and sign-in for each service offered under this grant. Grantee will submit a sample template of these documents to assigned OCP analyst in advance of the start of services.
- 2) Upon approval of reporting template, Grantee will submit monthly service objectives delivered by the 5<sup>th</sup> working day of the subsequent month. Internal documentation supporting reported service objective deliverables shall be available upon request and during the annual program monitoring process.
- 3) Grantee will send a representative to attend and participate in quarterly provider meetings for Support Circle – Program Pilot providers. Quarterly provider meetings will be scheduled and hosted by DAS-OCP staff.

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- 7) Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- 8) The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules, as applicable.
- 9) For assistance with reporting requirements or submission of reports, contact:

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*and*

Michael Zaugg  
Program Director, Office of Community Partnerships, DAS  
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## **X. Monitoring Activities**

- 1) **Program Monitoring:** Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports, 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; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; board of director list; and whether services are provided appropriately according to Sections III-VII.

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

Name <b>NEXT Village SF</b>	Term Jan 1, 2025 - Dec 31, 2026			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
If modification, Effective Date of Mod. _____ No. of Mod. _____				
<b>Program: Support Circles for Community Centers</b>				
Budget Reference Page No.(s)				(Total)
Program Term	<b>1/1/25-6/30/25</b> (6 months)	<b>7/1/25-6/30/26</b> (12 months)	<b>7/1/26-12/31/26</b> (6 months)	<b>Jan 1, 2025 - Dec 31, 2026</b>
<b>DAS Expenditures</b>				
Salaries & Benefits	\$1,534	\$3,068	\$1,534	\$6,136
Operating Expenses	\$966	\$1,932	\$966	\$3,864
<b>Subtotal</b>	<b>\$2,500</b>	<b>\$5,000</b>	<b>\$2,500</b>	<b>\$10,000</b>
Indirect Percentage (%)				
Indirect Cost				
Capital/Subcontractor Expenditures	\$2,500	\$5,000	\$2,500	\$5,000
<b>Total DAS Expenditures</b>	<b>\$5,000</b>	<b>\$10,000</b>	<b>\$5,000</b>	<b>\$20,000</b>
<b>DAS Revenues</b>				
General County Fund	\$5,000	\$10,000	\$5,000	\$20,000
<b>Total DAS Revenue</b>	<b>\$5,000</b>	<b>\$10,000</b>	<b>\$5,000</b>	<b>\$20,000</b>
<b>Non DAS Revenues</b>				
<i>NEXT Village Direct Costs</i>				\$11,966
<i>NEXT Village Benefits &amp; P/R taxes</i>				\$848
<i>Subtotal</i>				\$12,814
<i>NEXT Village Indirect Costs @ 50%</i>				\$6,407
<b>Total Non DAS Revenue</b>				<b>\$19,221</b>
<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$5,000</b>	<b>\$10,000</b>	<b>\$5,000</b>	<b>\$39,221</b>
Full Time Equivalent (FTE)	1.00	1.00	1.00	<b>3.00</b>
Prepared by: Gail Switzer				Date: 10/25/24
HSA-CO Review Signature:				
<b>HSA #1</b>				

**Salaries & Benefits Detail**

(Total)

DAS Salaries & Benefits	Agency Totals		HSA Program		1/1/25-6/30/25 (6 months)	7/1/25-6/30/26 (12 months)	7/1/26-12/31/26 (6 months)	Jan 1, 2025 - Dec 31, 2026
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Executive Director	\$122,698	100%	2.50%	0.025	\$1,534	\$3,068	\$1,534	\$6,136
<b>Totals</b>	\$122,698	1.00	2.50%	0.03	\$1,534	\$3,068	\$1,534	\$6,136
Fringe Benefits Rate								
Employee Fringe Benefits								
<b>Total DAS Salaries and Benefits</b>	\$122,698				\$1,534	\$3,068	\$1,534	\$6,136
<b>HSA #2</b>								

<b>Operating Expense Detail</b>				
	1/1/25-6/30/25 (6 months)	7/1/25-6/30/26 (12 months)	7/1/26-12/31/26 (6 months)	(Total) Jan 1, 2025 - Dec 31, 2026
<b>DAS Operating Expenses</b>				
<u>Expenditure Category</u>				
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)				
Office Supplies, Postage				
Building Maintenance Supplies and Repair				
Printing and Reproduction				
Insurance				
Licenses and Fees				
Staff Training				
Staff Travel				
Rental of Equipment				
<u>Consultants/Subcontractors</u>				
James Wong, Interepreter	\$966	\$1,932	\$966	\$3,864
<u>Other</u>				
<b>Total DAS Operating Expenses</b>	<b>\$966</b>	<b>\$1,932</b>	<b>\$966</b>	<b>\$3,864</b>
<b>HSA #3</b>				

### Capital & Subcontractor Expenditure Detail

<b>DAS Capital Expenditure</b>	<b>(Total)</b>			
<u>Equipment (Qty)</u>	1/1/25-6/30/25 (6 months)	7/1/25-6/30/26 (12 months)	7/1/26-12/31/26 (6 months)	Jan 1, 2025 - Dec 31, 2026
<b>Total Equipment Cost</b>				
<u>Remodeling</u>	1/1/25-6/30/25 (6 months)	7/1/25-6/30/26 (12 months)	7/1/26-12/31/26 (6 months)	Jan 1, 2025 - Dec 31, 2026
<b>Total Remodeling Cost</b>				
<u>Subcontractor</u>	1/1/25-6/30/25 (6 months)	7/1/25-6/30/26 (12 months)	7/1/26-12/31/26 (6 months)	Jan 1, 2025 - Dec 31, 2026
Seniors at Home	\$2,500	\$5,000	\$2,500	\$5,000
<b>Total Subcontractor Cost</b>	<b>\$2,500</b>	<b>\$5,000</b>	<b>\$2,500</b>	<b>\$5,000</b>
<b>Total DAS Capital &amp; Subcontractor Expenditure</b>	<b>\$2,500</b>	<b>\$5,000</b>	<b>\$2,500</b>	<b>\$5,000</b>
<b>HSA #4</b>				

**Appendix A – Services to be Provided**  
**SteppingStone**  
**Support Circle – Program Pilot**  
**January 1, 2025 – December 31, 2026**

**I. Purpose**

The purpose of this grant is to provide social programming supporting the mental and emotional health of older adults and adults with disabilities.

**II. Definitions**

Adult with a Disability	A person 18 years of age or older 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.
SF DAS GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services.
Dignity Fund	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAS will expend monies in the Fund solely to help seniors and



	adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities. <a href="https://www.sfhsa.org/about/departments/department-aging-and-adult-services-daas/dignity-fund">https://www.sfhsa.org/about/departments/department-aging-and-adult-services-daas/dignity-fund</a>
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Grantee	North and South of Market Adult Day Health Corporation dba Stepping Stone
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person’s primary language.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
OCP	Office of Community Partnerships.
Older Adult	Person who is 60 years of age or older; used interchangeably with “senior.”
Senior	Person who is 60 years of age or older; used interchangeably with the “older adult.”
SF-HSA	Human Services Agency of the City and County of San Francisco.
Socially Isolated	Having few social relationships and few people to interact with regularly.
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data

	concerning the sexual orientation and gender identity of the clients(consumers) they serve. (Chapter 104, Sections 104.1 through 104.9).
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**III. Target Population**

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

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

**IV. Eligibility for Program Participation**

To be eligible for services, clients must be:

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

**V. Description of Services**

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

- 1) Grantee will plan and host group meetings designed to address and support the emotional and mental health of participants at DAS funded Community Service programs. Meetings shall be designed to be a balance of informal, social discussions and more formalized guided support. Meetings shall be led by a facilitator with appropriate professional skills and experience.
- 2) Program facilitation / staffing requirements: Staff leading the Support Circle meetings shall be licensed professionals. Licensure should be from psychology, counseling, social work, or a related field. Acceptable examples are LCSW, PsyD, MFT. If grantee intends to have services facilitated by a licensure not listed above, please contact DAS-OCP analyst for approval in advance of services.
- 3) Grantee shall ensure that services are hosted in a welcoming, inclusive, and accessible environment.
- 4) Grantee shall ensure that program topics are relevant to participant interest and needs. Examples of possible topics include: loneliness and

isolation, grief, trauma, depression and anxiety. Grantee shall utilize existing client feedback pathways to identify and select topics.

- 5) Grantee shall develop and implement an outreach plan to raise awareness of services and to promote participation.
- 6) As dates/times/topics for Support Circle meetings are determined, Grantee shall develop written materials to inform potential participants of meetings and how to attend. Examples might be flyers or monthly calendars.
- 7) Grantee shall develop internal record keeping practices to meet the program guidelines and reporting practices described in this scope of services.

## **VI. Location and Time of Services**

Support Circle programs will be hosted at Grantee's Mission Creek Center located at 930 4<sup>th</sup> Street, San Francisco, CA 94158. Specific dates and times of Support Circle programs shall be submitted to DAS-OCP staff in advance of services.

## **VII. Service Objectives**

- 1) For the period of 1/1/25 – 6/30/25, Grantee shall meet the following service objectives:

Grantee will provide at least **25** sessions of support circle services. A session is one facilitated meeting of the support circle group.

Grantee will provide at least **25** hours of support circle services. An hour of support circle services is one hour of facilitated meeting time of the support circle group.

- 2) For the period for 7/1/25 – 6/30/26, Grantee shall provide the following service objectives:

Grantee will provide at least **50** sessions of support circle services. A session is one facilitated meeting of the support circle group.

Grantee will provide at least **50** hours of support circle services. An hour of support circle services is one hour of facilitated meeting time of the support circle group.

- 3) For the period of 7/1/26 – 12/31/26, Grantee shall meet the following service objectives:

Grantee will provide at least **25** sessions of support circle services. A session is one facilitated meeting of the support circle group.

Grantee will provide at least **25** hours of support circle services. An hour of support circle services is one hour of facilitated meeting time of the support circle group.

### **VIII. Outcome Objectives**

On an annual basis, Grantee will meet the following service objectives:

- 1) Participants feel better able to manage their emotional and/or mental health due to program participation. (Target 85%)
- 2) Participants indicate that discussion topics are appropriate and useful. (Target 85%)
- 3) Participants feel like valued community members due to opportunity to share knowledge, skills, stories, etc. through this program. (Target 85%)
- 4) Participants report they improved or maintained their wellbeing due to program participation. (Target 85%)
- 5) Participants feel safe and welcomed by program staff. (Target 85%)

Outcome objectives shall be measured through the administration of an annual client survey. Based on response rates in the first year of administration, an agreed upon minimum response rate may be established. Additional details on survey administration are described in Section IX, below.

### **IX. Reporting and Other Requirements**

- 1) Grantee will develop an internal tracking system which collects dates, times, participant name, and sign-in for each service offered under this grant. Grantee will submit a sample template of these documents to assigned OCP analyst in advance of the start of services.
- 2) Upon approval of reporting template, Grantee will submit monthly service objectives delivered by the 5<sup>th</sup> working day of the subsequent month. Internal documentation supporting reported service objective deliverables shall be available upon request and during the annual program monitoring process.
- 3) Grantee will send a representative to attend and participate in quarterly provider meetings for Support Circle – Program Pilot providers. Quarterly provider meetings will be scheduled and hosted by DAS-OCP staff.

- 4) Grantee will participate in the hosting of administration of a client survey to be offered to all participants of services funded under this grant. Grantee will participate in the coordination of survey administration by DAS-OCP staff.
- 5) Grantee program staff will complete an Elder Abuse Mandated Reporter Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
- 6) Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- 7) Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- 8) The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules, as applicable.
- 9) For assistance with reporting requirements or submission of reports, contact:

Margarita Gatam  
Contract Manager, Office of Contract Management, SFHSA  
Margarita.Gatam@sfgov.org

*and*

Michael Zaugg  
Program Director, Office of Community Partnerships, DAS  
Michael.Zaugg@sfgov.org

## **X. Monitoring Activities**

- 1) **Program Monitoring:** Program monitoring will include review of client eligibility, and back-up documentation for reporting progress towards meeting service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports, 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; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; board of director list; and whether services are provided appropriately according to Sections III-VI.

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

Name <b>SteppingStone</b>	Term Jan 1, 2025 - Dec 31, 2026
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(Check One) New  Renewal  Modification

If modification, Effective Date of Mod. \_\_\_\_\_ No. of Mod. \_\_\_\_\_

**Program: Support Circles for Community Centers**

Budget Reference Page No.(s)				(Total)
Program Term	<b>1/1/25-6/30/25</b> (6 months)	<b>7/1/25-6/30/26</b> (12 months)	<b>7/1/26-12/31/26</b> (6 months)	<b>Jan 1, 2025 - Dec 31, 2026</b>
<b>DAS Expenditures</b>				
Salaries & Benefits				
Operating Expenses	\$598	\$1,196	\$598	\$2,392
<b>Subtotal</b>	<b>\$598</b>	<b>\$1,196</b>	<b>\$598</b>	<b>\$2,392</b>
Indirect Percentage (%)	15.00%	15.00%	15.00%	15.00%
Indirect Cost	\$652	\$1,304	\$652	\$2,608
Capital/Subcontractor Expenditures	\$3,750	\$7,500	\$3,750	\$15,000
<b>Total DAS Expenditures</b>	<b>\$5,000</b>	<b>\$10,000</b>	<b>\$5,000</b>	<b>\$20,000</b>
<b>DAS Revenues</b>				
<i>General County Fund</i>	\$5,000	\$10,000	\$5,000	\$20,000
<b>Total DAS Revenue</b>	<b>\$5,000</b>	<b>\$10,000</b>	<b>\$5,000</b>	<b>\$20,000</b>
<b>Non DAS Revenues</b>				
<b>Total Non DAS Revenue</b>				
<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$5,000</b>	<b>\$10,000</b>	<b>\$5,000</b>	<b>\$20,000</b>
Full Time Equivalent (FTE)				

Prepared by: \_\_\_\_\_ Date: \_\_\_\_\_

HSA-CO Review Signature: \_\_\_\_\_

HSA #1

**Operating Expense Detail**

	1/1/25-6/30/25 (6 months)	7/1/25-6/30/26 (12 months)	7/1/26-12/31/26 (6 months)	(Total) Jan 1, 2025 - Dec 31, 2026
<b>DAS Operating Expenses</b>				
<u>Expenditure Category</u>				
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$148	\$296	\$148	\$592
Office Supplies, Postage	\$150	\$300	\$150	\$600
Building Maintenance Supplies and Repair				
Printing and Reproduction	\$200	\$400	\$200	\$800
Insurance				
Licenses and Fees				
Staff Training				
Staff Travel	\$100	\$200	\$100	\$400
Rental of Equipment				
<b>Total DAS Operating Expenses</b>	<b>\$598</b>	<b>\$1,196</b>	<b>\$598</b>	<b>\$2,392</b>

HSA #2



**Capital & Subcontractor Expenditure Detail**

**DAS Capital Expenditure**

(Total)

	1/1/25-6/30/25 (6 months)	7/1/25-6/30/26 (12 months)	7/1/26-12/31/26 (6 months)	Jan 1, 2025 - Dec 31, 2026
<u>Equipment (Qty)</u>				
<b>Total Equipment Cost</b>				
<u>Remodeling</u>				
<b>Total Remodeling Cost</b>				
<u>Subcontractor</u>				
Curry Senior Center (LCSW)	\$3,750	\$7,500	\$3,750	\$15,000
<b>Total Subcontractor Cost</b>	<b>\$3,750</b>	<b>\$7,500</b>	<b>\$3,750</b>	<b>\$15,000</b>
<b>Total DAS Capital &amp; Subcontractor Expenditure</b>	<b>\$3,750</b>	<b>\$7,500</b>	<b>\$3,750</b>	<b>\$15,000</b>

**HSA #4**