



Edwin M. Lee, Mayor

Trent Rhorer, Executive Director  
Shireen McSpadden, Executive Director

MEMORANDUM

TO: AGING and ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR  
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

DATE: JANUARY 4, 2017

SUBJECT: NEW GRANT: **FAMILY SERVICES AGENCY OF SAN FRANCISCO dba FELTON INSTITUTE** (NON-PROFIT) FOR COMMUNITY SERVICES AT 66 RAYMOND AVENUE

GRANT TERM: 1/1/17-6/30/18

GRANT AMOUNT:	<u>New</u>	<u>Contingency</u>	<u>Total</u>		
	\$190,000	\$19,000	\$209,000		

ANNUAL AMOUNT:	<u>FY16/17</u>	<u>FY17/18</u>			
	\$85,000	\$105,000			

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$190,000			\$19,000	\$209,000
PERCENTAGE:	100%				100%

The Department of Aging and Adult Services requests authorization to enter into a new grant with Family Services Agency of San Francisco dba Felton Institute for the time period starting January 1, 2017 and ending on June 30, 2018, in the amount of \$190,000 plus a 10% contingency for a total amount not to exceed \$209,000. The purpose of the grant is to provide Community Services in the Visitacion Valley Community Center located at 66 Raymond Avenue.

**Background**

Visitacion Valley is a neighborhood located in the southeastern section of the City near the border with Daly City with main corridors along Leland Avenue and Bayshore Boulevard. It is home to recent immigrants and long-time San Francisco families alike. Over 13,060 people live within a one-quarter mile radius of the Leland Avenue commercial corridor. According to a report by San Francisco Department of Public Health, approximately 13% percent of its residents are age 65 and over. Moreover, about 11 percent of the residents are reported to have a disability. Through this grant agreement, Felton Institute will provide community services at 66 Raymond Avenue to address the needs of the diverse aging population.

①

### **Services to be Provided**

Community Services consist of activities/services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Such services are provided in the agency's community center and in the community. The Centers play an important role in promoting socialization and maintaining independence among aging adults and adults living with disabilities. In addition to providing a positive avenue to create new friendships and social networks, the centers offer a wide array of activities and programming to enhance the cultural, educational, mental and physical well-being of participants. Focus is placed on the centers to be inclusive of the various diverse communities that comprise San Francisco. Activity/senior centers are often times the entry point for seniors/adults with disabilities in need of additional services.

There are four main categories of services associated with Senior Community Service programs are as follows and described below: (1) Activity Scheduling, (2) Enhanced Outreach, (3) Social Services/Other and (4) Translation.

Activity Scheduling: Grantee will schedule activities which may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and other group activities that bring people together for education or wellness purposes to help consumers maintain/enhance their level of functioning.

Enhanced Outreach: Grantee will provide more formal outreach efforts and/or specific campaigns to address access barriers in the Visitacion Valley community. Enhanced outreach efforts may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, e.g., safety issues, transportation needs, etc.

Social Services/Other: Grantee will provide one-on-one assistance to individuals enabling them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.

Translation: Grantee will provide translation assistance to consumers that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may comprise translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

Grantee will subcontract with Asian Pacific American Community Center to provide culturally and linguistically appropriate social services and activities such as intergenerational activities that bring together youth, older adults, and people with disabilities.

### **Selection**

Grantee was selected through Request for Proposals #718, which was competitively bid in September 2016.

### **Funding**

The funding for this grant is supported by add-back funds for FY17-18 and matching DAAS funds for FY16-17. This grant will be funded entirely through City and County General funds.

### **ATTACHMENTS**

Appendix A – Services to be Provided

Appendix B – Program Budget

Appendix F – Site Chart

## APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Effective January 1, 2017 to June 30, 2018  
Family Services Agency of San Francisco/Felton Institute  
Community Services at 66 Raymond

### I. Purpose

The purpose of this grant is to maintain and/or improve the wellbeing of older adults and people living with disabilities through the provision of a variety of services and activities programmed at 66 Raymond in the Visitacion Valley area of San Francisco.

### II. Definitions

City	City and County of San Francisco, a municipal corporation
Controller	Controller of the City and County of San Francisco or designated agent
Grantee	Felton Institute
HSA	Human Services Agency of the City and County of San Francisco
OCM	Office of Contract Management, Human Services Agency
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent.
DAAS	Department of Aging and Adult Services
OOA	Office on the Aging
Adult with Disability	Person 18 years of age or older living with a disability
Older Adults	Person who is 60 years or older
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results 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, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Unit of Service	Defined as one hour of service

Low Income Having income at or below 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.

Minority An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

CARBON Contracts Administration, Reporting and Billing On Line System

### III. Target Population

This grant will serve adults aged 60 and over and adults age 18-59 with disabilities who reside in the City and County of San Francisco with one or more of the following target priorities:

1. Low-income
2. Non or limited English speaking
3. Minority
4. Frail
5. Lesbian/Gay/Bisexual/Transgender

### IV. Eligibility for Community Services

- Adults aged 60 and above
- Adults 18 years of age or older living with a disability

### V. Location and Time of Services

The details of the site and operation hours are as attached in the Site Chart (Appendix F).

### VI. Description of Services

Community Services consist of activities/services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Such services are provided in the agency's community center and in the community.

There are four main categories of Community Services: Activity Scheduling, Enhanced Outreach Social Services/Other, and Translation as each described below.

Activity Scheduling: Service units are captured by the number of scheduled activity hours sponsored by the Activity/Senior Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes that help consumers maintain/enhance their level of functioning.

Enhanced Outreach: Service units are captured by providing more formal outreach efforts and enhanced services to support the outreach efforts. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc.

Social Services/Other: Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.

Translation: Service units are captured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

Services should be provided according to OOA Community Services Standards. The Visitacion Valley Community Center is a longtime hub in the neighborhood, recently re-opened for senior lunches and other senior programming. Providing an inclusive environment to all members of the community will be paramount.

## **VII. Contractor Responsibilities**

Provide quality services that attain a high satisfaction level from participants, as evidenced in annual Consumer Satisfaction Surveys

- Provide services that meet the needs of the individual.
- Provide physical activities that may increase the health of participants.
- Increase access to informational and educational presentations that enable individuals to maintain independent living.
- Provide activities to increase socialization opportunities for individuals.

## **VIII. Service Objectives**

Fiscal Year 2016-17, Services to begin January 1<sup>st</sup> 2016:

- Grantee will serve 125 unduplicated older adults and younger adults with disabilities composed of consumers from the Visitacion Valley neighborhood of San Francisco.
- Grantee will provide 480 units of service of scheduled activities approved by the Office on the Aging, of those 480 service units 80 units will be comprised of intergenerational activities. (Intergenerational activities are defined as activities that join children, youth, and older adults together in a structured, supervised activity.)
- Grantee will provide 150 units of service of translation services.
- Grantee will provide 100 units of service of social services.

- Grantee will provide 75 units of Enhanced Outreach to older adult and disabled residents of the Visitacion Valley neighborhood, striving to create and maintain an inclusive community center for the diverse locality.

#### Fiscal Year 2017-18

- Grantee will serve 250 unduplicated older adults and younger adults with disabilities composed of consumers from the Visitacion Valley neighborhood of San Francisco.
- Grantee will provide 960 units of service of scheduled activities approved by the Office on the Aging, of those 960 service units 260 units will be comprised of intergenerational activities. (Intergenerational activities are defined as activities that join children, youth and older adults together in a structured, supervised activity.)
- Grantee will provide 300 units of service of translation services.
- Grantee will provide 200 units of service of social services.
- Grantee will provide 150 units of Enhanced Outreach to older adult and dis disabled residents of the Visitacion Valley neighborhood, striving to create and maintain an inclusive community center for the diverse locality.

#### **IX. Outcome Objectives**

- At least 35% of unduplicated clients served in the course of the contract year will complete and return a consumer satisfaction survey.
- At least 85% of participants surveyed will indicate excellent or good in rating the quality of services they receive.
- At least 85% of participants surveyed will indicate that they receive the services and/or activities they need from the agency.
- At least 80% of participants surveyed who participate in one or more physical activities will report feeling more healthy due to participation.
- At least 80% of participants surveyed who participate in one or more informational/educational presentations will report they receive information to help them maintain independent living.
- At least 85% of participants surveyed report that center activities increase their socialization opportunities and interaction with others.

#### **X. Reporting and Other Requirements**

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

- A. The grantee will enter into the CA Getcare -consumers' data in the Community Services module.
- B. The grantee will enter into the CA Getcare Service Unit section all the units of service by the 5th working day of the month for the preceding month.





- C. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
1. Number of unduplicated consumers served during the month.
  2. Number of units of service of scheduled activities at an activity/senior center or venues approved by the Office on the Aging provided during the month.
  3. Number of units of translation services provided during the month.
  4. Number of units of social services provided during the month.
- D. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis:
- The percentage of participants surveyed that have indicated excellent or good in rating the quality of services they received.
  - The percentage of participants surveyed that have indicated they have received the services and/or activities they needed from the agency.
  - The percentage of participants surveyed that have participated in one or more physical activities, have reported feeling healthier due to participation.
  - The percentage of participants surveyed who have participated in one or more informational/educational presentations have reported they have received information to help them maintain independent living.
  - The percentage of participants surveyed reported that center activities have increased their socialization opportunities and interaction with others.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10<sup>th</sup> day following the time study month and shall be entered on line to this website link: <https://sfhsa.hfa3.org/signin>
- F. Grantee shall 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.
- G. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year.
- H. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- I. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Linda Murley, Program Analyst  
 DAAS, Office on the Aging  
 P.O. Box 7988  
 San Francisco, CA 94120  
[linda.murley@sfgov.org](mailto:linda.murley@sfgov.org)

Arata Goto, Contract Manager  
 Human Services Agency  
 P.O. Box 7988  
 San Francisco, CA 94120  
[arata.goto1@sfgov.org](mailto:arata.goto1@sfgov.org)

## **XI. Monitoring Activities**

Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-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; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

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.





	A	B	C	D	E
1					Appendix B, Page
2					Document Date: 12/7/2016
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>				
4	<b>BY PROGRAM</b>				
5	Name			Term	
6	Felton Institute/Family Service Agency of San Francisco			1/1/17 - 06/30/18	
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Community Services at 66 Raymond				
10	Budget Reference Page No.(s)				Total
11	Program Term		1/1/17-6/30/17	7/1/17-6/30/18	1/1/17 - 06/30/18
12	<b>Expenditures</b>				
13	Salaries & Benefits	\$41,600	\$46,800		\$88,400
14	Operating Expense	\$32,313	\$44,504		\$76,817
15	<b>Subtotal</b>	\$73,913	\$91,304		\$165,217
16	Indirect Percentage (%)	15%	15%		15%
17	Indirect Cost (Line 16 X Line 15)	\$11,087	\$13,696		\$24,783
18	Capital Expenditure				
19	Total Expenditures	\$85,000	\$105,000		\$190,000
20	<b>HSA Revenues</b>				
21	General Fund	\$85,000	\$105,000		\$190,000
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$85,000	\$105,000		\$190,000
30	<b>Other Revenues</b>				
31					
32					
33					
34					
35					
36	Total Revenues	\$85,000	\$105,000		\$190,000
37	Full Time Equivalent (FTE)				
39	Prepared by:		Telephone No.:		Date
40	HSA-CO Review Signature: _____				
41	HSA #1				11/15/2007

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	A	B	C	D	E	F	G	H	I
1									
2									
3									
4	Program Name:								
5	(Same as Line 9 on HSA #1)								
6									
7									
8									
9									
10									
11						1/1/17-6/30/17	7/1/17-6/30/18		1/1/17-6/30/18
		Agency Totals		For HSA Program		For DHS Program	For DHS Program		TOTAL
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary		
12	POSITION TITLE								
13	Program Manager	\$80,000	100%	40%	40%	\$16,000	\$4,000		\$20,000
14	Activities Coordinator	\$40,000	100%	80%	80%	\$16,000	\$32,000		\$48,000
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30	TOTALS		2.00	1.20	1.20	\$32,000	\$36,000		\$68,000
31									
32	FRINGE BENEFIT RATE	30%							
33	EMPLOYEE FRINGE BENEFITS					\$9,600	\$10,800	\$0	\$20,400
34									
35									
36	TOTAL SALARIES & BENEFITS	\$0				\$41,600	\$46,800	\$0	\$88,400
37	HSA #2								11/15/2007

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	A	B	C	D	E	F	G	H	I	J	K
1											Appendix B, Page
2											Document Date: 12/7/2016
3											
4	Program Name:										
5	(Same as Line 9 on HSA #1)										
6											
7	<b>Operating Expense Detail</b>										
8											
9											
10											
11											
12	Expenditure Category		TERM	1/1/17-6/30/17	7/1/17-6/30/18						TOTAL 1/1/17-6/30/18
13	Rental of Property			\$2,652	\$0						\$2,652
14	Utilities(Elec, Water, Gas, Phone, Scavenger)			\$1,200	\$0						\$1,200
15	Office Supplies, Postage			\$300	\$300						\$600
16	Building Maintenance Supplies and Repair			\$1,200	\$0						\$1,200
17	Printing and Reproduction			\$1,600	\$1,516						\$3,116
18	Insurance			\$600	\$1,200						\$1,800
19	Staff Training										
20	Staff Travel-(Local & Out of Town)			\$150	\$360						\$510
21	Rental of Equipment										
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE										
23	Asian Pacific American Community Center			\$23,013	\$38,938						\$61,951
24											
25											
26											
27											
28	OTHER										
29	Activity Supplies and Expenses			\$1,598	\$2,190						\$3,788
30											
31											
32											
33											
34											
35	TOTAL OPERATING EXPENSE			\$32,313	\$44,504						\$76,817
36											
37	HSA #3										11/15/2007

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**SITE CHART F**

AGENCY: Felton Institute

HSA/DAAS/OFFICE ON THE AGING

CONTRACT MAILING ADDRESS: 711 Van Ness Avenue, Suite 550, San Francisco, CA 94102

DIRECTOR: Derek L. Toliver

PHONE NO.: 415-982-7007, ext. 611

SITES: (includes congregate nutrition, community/social services, home-delivered meal, food distribution, etc.)	Main Office	Other Site applicable to this program:		
Name of Site	66 Raymond Avenue			
Address and ZIP	66 Raymond Avenue San Francisco, CA 94134			
Phone Number	415-587-2689			
Fax Number				
Neighborhood Person in Charge Site Manager	Rex Tabora, APACC Amor Santiago, APA			
Programs Offered	Activity Scheduling Translation Services Social Services Enhanced Outreach			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:30am - 3:30pm			
Hours of scheduled programming	5 Hours			
Hours of meal service	12pm - 1pm			
Annual number of meals at site	N/A			
Annual # nutrition education units	N/A			
Average number of meals per day	45			
Total number of service days in FY				
Days closed	Saturday & Sunday			
Handicapped Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

