



Edwin M. Lee, Mayor

Department of Human Services
Department of Aging and Adult Services

Trent Rhorer, Executive Director

MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: MELISSA MCGEE, INTERIM DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *JKT*

DATE: SEPTEMBER 7, 2016

SUBJECT: **NEW GRANTS: SHANTI PROJECT (NON-PROFIT) FOR PROVISION OF SOCIAL ISOLATION PREVENTION AND ANIMAL BONDING SERVICES FOR LESBIAN, GAY, BISEXUAL, AND TRANSGENDER (LGBT) SENIORS AND ADULTS WITH DISABILITIES**

GRANT TERM: SEPTEMBER 1, 2016 to JUNE 30, 2018

GRANT AMOUNTS: Please see table below.

FUNDING SOURCE:

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
TOTAL FUNDING:	\$840,000	\$0	\$0	\$84,000	\$924,000
FUNDING PERCENTAGE:	100%	0%	0%		100%

The Department of Aging and Adult Services requests authorization to enter into new grant agreements with Shanti Project for the time period beginning September 1, 2016 and ending June 30, 2018, in the amount of \$840,000 plus a 10% contingency of \$84,000 for a total not to exceed amount of \$924,000. The purpose of these grants is to provide Social Isolation Prevention and Animal Bonding Services to Lesbian, Gay, Bisexual, and Transgender (LGBT) Seniors and Adults with Disabilities (AWD).

Program	Contract Amount 09/01/16-06/30/17	Contract Amount 07/01/17-06/30/18	Contingency	Total Amount
Social Isolation Prevention	\$320,000	\$320,000	\$64,000	\$704,000
Animal Bonding Services	\$200,000		\$20,000	\$220,000
Total	\$520,000	\$320,000	\$84,000	\$924,000

Background

The San Francisco LGBT Aging Policy Task Force was convened in 2012 by the Board of Supervisors to evaluate the needs of LGBT seniors, to assess the capacity of the current support system to meet those needs, and to make recommendations to address any unmet needs. As a result of their work, “LGBT Aging at the Golden Gate: San Francisco Policy Issues and Recommendations,” was issued by the Task Force in March 2014.

Findings from the Task Force report indicate that LGBT older adults, when compared to those who identify with the heterosexual population, live with higher rates of physical disabilities, are more likely to live alone, lack companionship, and have lower levels of social support—factors which lead to significantly higher rates of social isolation, depression, anxiety, and suicide ideation. The Task Force reviewed services available in San Francisco which address these issues and found such services be lacking, resulting in the Task Force’s recommendation of establishment of new programming to address this growing community need. In particular, the Task Force recommended a program design which utilizes care navigation and peer volunteer support, models of service delivery which have had a history of success.

Through the Board of Supervisors add-back budgeting process, \$200,000 was allocated on a one-time-only basis (for FY16/17) to support programming related to social isolation and animal bonding services for LGBT Seniors and Adults with Disabilities.

Services to be Provided – Social Isolation Prevention

Grantee will develop and implement a program utilizing 1) care navigation, 2) peer support, and 3) supportive programming in order to address the emotional, behavioral, health, and social isolation challenges faced by lesbian, gay, bisexual, and transgender seniors and adults with disabilities.

1) Care Navigators serve as the main point of contact for clients, and provide services which include intake, follow up, ongoing assessment and care coordination, information and referral, and drop-in facilitation. Care Navigators will also help with the development and utilization of peer support volunteers who, in turn, help support clients participating in the program.

2) Peer Support Volunteers will provide outreach and supportive services for clients participating in the program. Services include emotional and practical support via regular interactions with clients such as social visits, accompaniment to appointments or events, and other assistance.

3) Support Programming will create and increase the number of connective programs that support and enhance the emotional and behavioral wellbeing of underserved LGBT seniors and adults with disabilities. These connective programs shall consist of: individual emotional and behavioral support, peer support groups, social activities, and outreach, education, and early intervention programs.

For more specific information regarding the services to be provided, please refer to the attached Appendix A-1.

Services to be Provided – Animal Bonding

Grantee will utilize a similar model to that of social isolation prevention services, which are based on care navigation and peer support volunteers, for delivery of animal companion support services and resources. Care Navigation and Peer Support Volunteer services are detailed above; within the

animal bonding services context, these services have an increased pet focus. Staff and volunteers work to connect clients and their pets to the pet food bank, pet health and maintenance services, help with walks and exercise for pets, and other assistance as needed.

For more specific information regarding the services to be provided, please refer to the attached Appendix A-2.

Selection

Grantee was selected through RFP (Request for Proposals) #701, which was issued in May 2016.

Funding

This grant will be funded entirely through City and County funds.

Attachments

Appendix A-1: Services to be Provided – Social Isolation Prevention for LGBT Seniors/AWD

Appendix B-1: Budget – Social Isolation Prevention for LGBT Seniors/AWD

Appendix A-2: Services to be Provided – Animal Bonding Services for Isolated LGBT Seniors/AWD

Appendix B-2: Budget – Animal Bonding Services for Isolated LGBT Seniors/AWD

APPENDIX A-1: SERVICES TO BE PROVIDED

Shanti Project

Social Isolation Prevention Services for LGBT Seniors and Adults with Disabilities September 1, 2016 to June 30, 2018

I. Purpose

Limited supportive services are available to address the emotional, behavioral, health, and social isolation challenges faced by lesbian, gay, bisexual, and transgender seniors and adults with disabilities. This grant seeks to address these issues through the development and implementation of a program utilizing 1) care navigation, 2) peer support, and 3) supportive programming.

II. Definitions

Adult with Disability (AWD)	Person 18 years of age or older living with a disability.
Care Navigation	Includes the following: intake, follow up, on-going assessment, information and referral, on-going care coordination, matching and support of client-volunteer peer support matches, facilitation of peer support volunteer trainings, facilitation of drop-in services, support group facilitation, peer-based psychosocial support (including practical assistance and emotional support).
DAAS	Department of Aging and Adult Services
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.
Grantee	Shanti Project

HSA	Human Services Agency
Isolation	For the purpose of this program, isolation is defined as combination of 2 or more of the following factors: self-reported feelings of isolation, mild to moderate depression, lack of natural or reliable supports, chronic illness or conditions, need for emotional and practical support, lack of engagement with available community-based, natural or social supports, and other additional factors that indicate 1:1 in home and wraparound support would be beneficial
LGBT	Lesbian, Gay, Bisexual, Transgender
OOA	Office on the Aging
Peer Support	Includes the use of paid staff, student-interns, and peer support volunteers. Peer support services include emotional and practical support via regular interactions with clients such as social visits, accompaniment to appointments or events, and other assistance.
Senior	Person who is over 60 years old
Subgrantee	Curry Senior Center
Supportive Programming	Includes individual emotional and behavioral support, peer support groups (including abstinence-based and substance-use management groups), and social activities; outreach, education, and early intervention programs.

III. Target Population

Isolated LGBT seniors and adults with disabilities who are residents of the San Francisco.

Services must also target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited –English speaking
- Minority
- Frail

IV. Description of Services / Units of Service

In response to the LGBT Aging Task Force finding that there are limited support services for LGBT older adults and following in the LGBT Aging Task Force recommendations, this program seeks to blend the following three proven models of service to address the emotional, practical and behavioral health needs of LGBT Seniors.

A. Care Navigation: Care Navigators serve as the main point of contact for clients, and provide services which include but are not limited to intake, follow up, ongoing assessment and care coordination, information and referral, and drop-in facilitation. Care Navigators will also help with the development and utilization of peer support volunteers who, in turn, help support clients participating in the program. Care Navigators will match peer support volunteers with clients and assist with facilitation of peer support volunteer trainings, support group facilitation, and peer-based psychosocial support (including practical assistance and emotional support).

Care Navigator qualifications are based on expertise in providing harm reduction-based coordination, advocacy, and/or psychosocial support to at-risk communities, and therefore these positions are not required to have specific licensure or graduate-level training. Care Navigators are evaluated for experience and competence in serving severe need populations and targeted communities.

B. Peer Support: Peer Support Volunteers provide outreach and supportive services for isolated, underserved LGBT seniors and AWD living with emotional and behavioral health challenges. Use of a peer support network provides an innovative service delivery framework for a target population that may be reluctant to seek traditional health and social services due to a history of discrimination and marginalization.

Grantee will develop an assessment and training program for Peer Volunteers prior to matching them to clients. Assessment should include evaluation of a volunteer's physical and mental health status and ability to provide support as intended by this program element. Training should be comprehensive and cover cultural competency, boundaries, Aging 101, the grieving process, suicide ideation, clinical issues (including cognitive impairment), psychosocial issues, harm reduction models, and the peer counseling/support model.

C. Support Programming: This program also seeks to create and increase the number of connective programs that support and enhance the emotional and behavioral wellbeing of underserved LGBT older adults. These connective programs shall consist of:

- 1) individual emotional and behavioral support,
- 2) peer support groups, including abstinence-based and substance-use management groups, social activities, and
- 3) outreach, education, and early intervention programs

Support programming will primarily be provided via subgrant with Curry Senior Center, which currently offers LGBT-specific community services. Curry will develop,

coordinate, and implement connective programs, and perform outreach to the wider Tenderloin and South of Market communities to engage the target population.

In delivery of the above program model, the following units of service will be used to help measure program performance:

- 1) Unduplicated Consumers. Grantee will provide services to consumers which consist of the target population.

UNIT: One unduplicated consumer.

- 2) Care Navigation. Grantee will provide Care Navigation services, consisting of: intake, follow up, on-going assessment, information and referral, on-going care coordination, matching and support of client-volunteer peer support matches, facilitation of peer support volunteer trainings, facilitation of drop-in services, support group facilitation, peer-based psychosocial support (including practical assistance and emotional support).

UNIT: One hour of Care Navigation services.

- 3) Volunteer Recruitment and Development. The service model includes volunteers that are trained and then assigned to work with consumers. Conduct outreach to draw volunteers who will then undergo formal training and will make a specified minimum time commitment to the program.

UNIT: One volunteer.

- 4) Peer Support. Grantee will train, coordinate, and provide peer support through the use of paid staff, student-interns, and peer support volunteers. Peer support services include emotional and practical support via regular interactions with clients such as social visits, accompaniment to appointments or events, and other assistance.

UNIT: One hour of Peer Support to consumers.

- 5) Support Programming. Includes individual emotional and behavioral support, peer support groups (including abstinence-based and substance-use management groups), and social activities; outreach, education, and early intervention programs.

UNIT: One hour of Support Programming.

V. Location and Time of Services

Details of the sites and operation hours are as attached in the Site Chart (Appendix F.)

VI. Service Objectives

For the period September 1, 2016 – June 30, 2017, Grantee will:

- Provide program services for at least **75** unduplicated consumers.
- Provide at least **2620** hours of Care Navigation to consumers.
- Provide Volunteer Recruitment and Development services to at least **20** volunteers.
- Provide at least **2085** Peer Support hours to consumers, delivered by trained peer support volunteers.
- Provide at least **250** hours of Support Programming to consumers, in collaboration with Curry Senior Center and other community partners including Project Open Hand, AIDS Housing Alliance, SFAF 5-Plus, and Lyon Martin Health Services.
- At least **thirty-five percent** (35%) of consumers will respond to an annual consumer satisfaction survey.
- At least **fifty percent** (50%) of peer support volunteers will respond to an annual consumer satisfaction survey.

* Service units reflect a pro-rated total covering a 10-month (as opposed to 12-month) service period in the first year of the grant.

For FY 17/18, Grantee will:

- Provide program services for at least **90** unduplicated consumers.
- Provide at least **1650** hours of Care Navigation to consumers.
- Provide Volunteer Recruitment and Development services to at least **44** volunteers.
- Provide at least **4400** Peer Support hours to consumers, delivered by trained peer support volunteers.
- Provide at least **300** hours of Support Programming to consumers, in collaboration with Curry Senior Center and other community partners including Project Open Hand, AIDS Housing Alliance, SFAF 5-Plus, and Lyon Martin Health Services.
- At least **thirty-five percent** (35%) of consumers will respond to an annual consumer satisfaction survey.
- At least **fifty percent** (50%) of peer support volunteers will respond to an annual consumer satisfaction survey.

VII. Outcome Objectives

- At least **seventy percent** (70%) of consumers responding to an annual consumer satisfaction survey will be satisfied (or better) with services and find it beneficial to them.
- At least **seventy percent** (70%) of peer support volunteers responding to an annual consumer satisfaction survey report that their training was comprehensive and helpful to their program role.
- At least **seventy percent** (70%) of consumers will demonstrate reduced isolation by their engagement in care navigation, volunteer peer support activities, or supportive programming.

VIII. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form by the 5th working day of the month for the preceding month's services.
- B. Grantee will enter into CA-GetCare all the units of service in the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Monthly reports must be entered into the Contracts Administration, Billing and Reporting Online (CARBON) system for each unit of service delivered during the reporting period for each service listed in Section VI.
- D. 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 of the following fiscal year. This report must be submitted to the CARBON system.
- E. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to Appendices within the Grant Agreement.
- F. 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.
- 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. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.

J. For assistance with reporting requirements or submission of reports, please contact:

Victoria Chan, Contract Manager
Human Services Agency
P.O. Box 7988
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Michael Zaugg, Program Analyst
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IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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; board of director list; and whether services are provided appropriately according to Sections IV, VI and VII.
- 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.

	A	B	C	D
1	Appendix B-1, p.1			
2	Document Date: 08/24/2016			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Term	
6	Shanti Project		09/01/2016 - 06/30/2018	
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Isolation Prevention Services for LGBT Seniors and Adults with Disabilities			
10	Budget Reference Page No.(s)			
11	Program Term	9/1/16-06/30/17	7/1/17-06/30/18	Total
12	Expenditures			
13	Salaries & Benefits	\$205,621	\$205,333	\$410,954
14	Operating Expense	\$87,957	\$88,245	\$176,202
15	Subtotal	\$293,578	\$293,578	\$587,156
16	Indirect Percentage (%)	9%	9%	9%
17	Indirect Cost (Line 16 X Line 15)	\$26,422	\$26,422	\$52,844
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$320,000	\$320,000	\$640,000
20	HSA Revenues			
21	General Fund	\$320,000	\$320,000	\$640,000
22				
23				
24				
25				
26				
27	TOTAL HSA REVENUES	\$320,000	\$320,000	\$640,000
28	Other Revenues			
29	Private donations	\$25,000	\$25,000	\$50,000
30				
31				
32				
33				
34	Total Revenues	\$345,000	\$345,000	\$690,000
35	Full Time Equivalent (FTE)	3.32	3.50	6.82
37	Prepared by: Bruce Campbell	Telephone No.:		
38	HSA-CO Review Signature:	_____		
39	HSA #1	11/15/2007		

	A	B	C	D	E	F	G	H	I
1	Appendix B-1, p.3								
2	Document Date: 08/24/2016								
3									
4	Program: Isolation Prevention Services for LGBT Seniors and Adults with Disabilities								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11	TOTAL								
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>9/1/16-06/30/17</u>		<u>7/1/17-06/30/18</u>		
13	Occupancy/Rental of Property				\$9,922		\$10,210		\$20,132
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$310		\$310		\$620
15	Office Supplies, Postage				\$980		\$980		\$1,960
16	Building Maintenance Supplies and Repair				\$1,600		\$1,600		\$3,200
17	Communications				\$550		\$550		\$1,100
18	Printing and Reproduction				\$325		\$325		\$650
19	Insurance				\$1,450		\$1,450		\$2,900
20	Staff Training								
21	Staff Travel-(Local & Out of Town)								
22	Rental of Equipment				\$950		\$950		\$1,900
23	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
24	Curry Senior Center Subcontract				\$46,870		\$46,870		\$93,740
25									
26									
27									
28									
29	OTHER								
30	LGBT Senior/AWD Outreach: Advertising				\$25,000		\$25,000		\$50,000
31									
32									
33									
34									
35									
36									
37									
38									
39	TOTAL OPERATING EXPENSE				\$87,957		\$88,245		\$176,202
40									
41	HSA #3								11/15/2007

APPENDIX A-2: SERVICES TO BE PROVIDED
Shanti Project / PAWS
Animal Bonding Services for Isolated LGBT Seniors and Adults with Disabilities
September 1, 2016 to June 30, 2017

I. Purpose

The purpose of this grant is to provide animal bonding services to isolated LGBT Seniors and Adults with Disabilities. Pets are a powerful source of companionship and support for their pet owners, but can easily become a liability to low-income and frail individuals. Sustaining the human-animal bond can be critical to the health and well-being of those individuals. This grant seeks to address these issues through care navigation, peer support, and pet care resources.

II. Definitions

Adult with Disability (AWD)	Person 18 years of age or older living with a disability.
Care Navigation	Includes the following: intake, follow up, on-going assessment, information and referral, on-going care coordination, matching and support of client-volunteer peer support matches, facilitation of peer support volunteer trainings, facilitation of drop-in services, support group facilitation, peer-based psychosocial support (including practical assistance and emotional support).
DAAS	Department of Aging and Adult Services
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.
Grantee	Shanti Project / Pets Are Wonderful Support (“PAWS”)

HSA	Human Services Agency
Isolation	For the purpose of this program, isolation is defined as combination of 2 or more of the following factors: self-reported feelings of isolation, mild to moderate depression, lack of natural or reliable supports, chronic illness or conditions, need for emotional and practical support, lack of engagement with available community-based, natural or social supports, and other additional factors that indicate 1:1 in home and wraparound support would be beneficial
LGBT	Lesbian, Gay, Bisexual, Transgender
OOA	Office on the Aging
Peer Support	Includes the use of paid staff, student-interns, and peer support volunteers. Peer support services include emotional and practical support via regular interactions with clients such as social visits, accompaniment to appointments or events, and other assistance.
Senior	Person who is over 60 years old

III. Target Population

Isolated LGBT seniors and adults with disabilities, with pets, who are residents of San Francisco.

Services must also target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Non or limited –English speaking
- Minority
- Frail

IV. Description of Services / Units of Service

In recognition of the strong support a pet can provide for an isolated individual, this program seeks to blend the following proven models of service to both address the social, emotional, practical, and behavioral health needs of isolated LGBT Seniors and to provide support to their animal companions.

A. Care Navigation: Care Navigators serve as the main point of contact for clients, and provide services which include but are not limited to intake, follow up, ongoing

assessment and care coordination, information and referral, and drop-in facilitation. Care Navigators will also help with the development and utilization of peer support volunteers who, in turn, help support clients participating in the program. Care Navigators will match peer support volunteers with clients and assist with facilitation and dedication of pet care services and resources, peer support volunteer trainings, and peer-based psychosocial support.

Care Navigator qualifications are based on expertise in providing harm reduction-based coordination, advocacy, and/or psychosocial support to at-risk communities, and therefore these positions are not required to have specific licensure or graduate-level training. Care Navigators are evaluated for experience and competence in serving severe need populations and targeted communities.

B. Peer Support: Peer Support Volunteers provide outreach and supportive services for isolated, underserved LGBT seniors and adults with disabilities who need pet support services. Use of a peer support network provides an innovative service delivery framework for a target population that may be reluctant to seek support services for themselves or their animal companions due to a history of discrimination and marginalization.

Grantee will develop an assessment and training program for Peer Volunteers prior to matching them to clients. Assessment should include evaluation of a volunteer's physical and mental health status and ability to provide support as intended by this program element. Training should be comprehensive; suggested topics could include animal care basics, cultural competency, boundaries, Aging 101, the grieving process, suicide ideation, clinical issues (including cognitive impairment), psychosocial issues, harm reduction models, and the peer counseling/support model.

Through intake and assessment, Grantee will determine pet care resources that best fit each client's needs. Current available care options, which are largely leveraged by Shanti from other financial resources, include but are not limited to the following:

- **Pet Food Bank**: Clients are entitled to one visit every 4 weeks. Homebound clients can register for the food delivery program. Prescription food is also available with a vet prescription.
- **Annual Wellness Exam**: Each registered pet may receive one free exam and a set of vaccinations each year at Pets Unlimited. Clients may also qualify for financial assistance with veterinary services, emergency pet services, and diagnostics like x-rays or biopsies.
- **Supportive Pet Care Services**: dog walking (regular exercise for pets whose guardians are homebound); in-home cat care (litterbox maintenance or feeding); transportation (to and from veterinary appointments); emergency foster care (during client emergencies, such as client hospitalization or loss of housing)

In delivery of the above program model, the following units of service will be used to help measure program performance:

- 1) Unduplicated Consumers. Grantee will provide services to consumers which consist of the target population.

UNIT: One unduplicated consumer.

- 2) Care Navigation. Grantee will provide Care Navigation services, consisting of: intake, follow up, on-going assessment, information and referral, on-going care coordination, matching and support of client-volunteer peer support matches, coordinating pet-focused volunteers to assist with the needs of clients' pets, facilitation of peer support volunteer trainings, facilitation of drop-in services, support group facilitation, peer-based psychosocial support (including practical assistance and emotional support).

UNIT: One hour of Care Navigation services.

- 3) Volunteer Recruitment and Development. The service model includes volunteers that are trained and then assigned to work with clients and their pets. Conduct outreach to draw volunteers who will then undergo formal training and will make a specified minimum time commitment to the program.

UNIT: One volunteer.

- 4) Peer Support. Grantee will provide peer support through the use of paid staff, student-interns, and peer support volunteers. Peer support services include social, emotional, and practical support via regular interactions with clients; and assistance with pets such as walking/exercise, maintenance, administration of medications, and emergency foster care.

UNIT: One hour of Peer Support to consumers.

V. Location and Time of Services

Details of the sites and operation hours are as attached in the Site Chart (Appendix F.)

VI. Service Objectives

For the period September 1, 2016 – June 30, 2017, Grantee will:

- Provide program services for at least **50** unduplicated consumers.
- Provide at least **625** hours of Care Navigation to consumers.
- Provide Volunteer Recruitment and Development services to at least **20** volunteers.

- Provide at least **2075** Peer Support hours to consumers, delivered by trained peer support volunteers.
- At least **thirty-five percent** (35%) of consumers will respond to an annual consumer satisfaction survey.
- At least **fifty percent** (50%) of peer support volunteers will respond to an annual consumer satisfaction survey.

VII. Outcome Objectives

- At least **seventy percent** (70%) of consumers responding to an annual consumer satisfaction survey will be satisfied (or better) with services and find it beneficial to them.
- At least **seventy percent** (70%) of peer support volunteers responding to an annual consumer satisfaction survey report that their training was comprehensive and helpful to their program role.
- At least **seventy percent** (70%) of consumers will demonstrate reduced isolation by their engagement in care navigation, volunteer peer support activities, and animal support services.

VIII. Reporting Requirements

- A. Grantee will enter into CA-GetCare the consumer data including the Intake Form by the 5th working day of the month for the preceding month's services.
- B. Grantee will enter into CA-GetCare all the units of service in the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Monthly reports must be entered into the Contracts Administration, Billing and Reporting Online (CARBON) system for each unit of service delivered during the reporting period for each service listed in Section VI.
- D. 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 of the following fiscal year. This report must be submitted to the CARBON system.
- E. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to Appendices within the Grant Agreement.
- F. 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.

- 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. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- J. For assistance with reporting requirements or submission of reports, please contact:

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 Human Services Agency
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IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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; board of director list; and whether services are provided appropriately according to Sections IV, VI, and VII.
- 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.

	A	B	C
1	Appendix B-2, p.1		
2	Document Date: 08/24/2016		
3			
4	HUMAN SERVICES AGENCY BUDGET SUMMARY		
5	BY PROGRAM		
6	Name		
7	Shanti Project		
8	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>		
9	If modification, Effective Date of Mod. No. of Mod.		
10	Program: Animal Bonding Services for Isolated LGBT Seniors and Adults with Disabilities		
11	Budget Reference Page No.(s)		
12	Program Term	9/1/16-06/30/17	Total
13	Expenditures		
14	Salaries & Benefits	\$169,090	\$169,090
15	Operating Expense	\$14,396	\$14,396
16	Subtotal	\$183,486	\$183,486
17	Indirect Percentage (%)	9%	9%
18	Indirect Cost (Line 16 X Line 15)	\$16,514	\$16,514
19	Capital Expenditure	\$0	\$0
20	Total Expenditures	\$200,000	\$200,000
21	HSA Revenues		
22	General Fund	\$200,000	\$200,000
23			
24			
25			
26			
27			
28	TOTAL HSA REVENUES	\$200,000	\$200,000
29	Other Revenues		
30			
31			
32			
33			
34			
35	Total Revenues	\$200,000	\$200,000
36	Full Time Equivalent (FTE)	2.97	2.97
38	Prepared by: Bruce Campbell		
39	HSA-CO Review Signature: _____		
40	HSA #1		11/15/2007

	A	B	C	D	E	F	G
1							
2							
3							
4	Program: Animal Bonding Services for Isolated LGBT Seniors and Adults with Disabilities						
5	(Same as Line 9 on HSA #1)						
6							
7	Salaries & Benefits Detail						
8							
9							
10	9/1/16-06/30/17						
11		Agency Totals		For HSA Program		For HSA Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/16 to 6/30/18
13	Care Navigator/Volunteer Coordinator	\$43,992	100%	42%	42%	\$18,330	\$18,330
14	Care Navigator/Volunteer Coordinator	\$43,992	100%	83%	83%	\$36,660	\$36,660
15	Food Bank & Facilities Manager	\$60,000	100%	83%	83%	\$50,000	\$50,000
16	Program Admin Assistant	\$41,600	100%	83%	83%	\$34,667	\$34,667
17	Volunteer Director	\$85,000	100%	5%	5%	\$4,250	\$4,250
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29	TOTALS	\$274,584	5.00	2.97	2.97	\$143,907	\$143,907
30							
31	FRINGE BENEFIT RATE	17%					
32	EMPLOYEE FRINGE BENEFITS	\$48,052				\$25,183	\$25,183
33							
34							
35	TOTAL SALARIES & BENEFITS	\$322,636				\$169,090	\$169,090
36	HSA #2						11/15/2007

	A	B	C	D	E	F	G
1	Appendix B-2, p.3						
2	Document Date: 08/24/2016						
3							
4	Program: Animal Bonding Services for Isolated LGBT Seniors and Adults with Disabilities						
5	(Same as Line 9 on HSA #1)						
6							
7	Operating Expense Detail						
8							
9							
10							
11	TOTAL						
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>9/1/16-06/30/17</u>		
13	Occupancy/Rental of Property				\$8,910		\$8,910
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$276		\$276
15	Office Supplies, Postage				\$872		\$872
16	Building Maintenance Supplies and Repair				\$1,424		\$1,424
17	Communications				\$490		\$490
18	Printing and Reproduction				\$289		\$289
19	Insurance				\$1,289		\$1,289
20	Staff Training						
21	Staff Travel-(Local & Out of Town)						
22	Rental of Equipment				\$846		\$846
23	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE						
24							
25							
26							
27							
28							
29	OTHER						
30							
31							
32							
33							
34							
35							
36							
37	TOTAL OPERATING EXPENSE				\$14,396		\$14,396
38							
39	HSA #3						11/15/2007