



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 *Ju*

DATE: JUNE 7, 2017

SUBJECT: NEW GRANT: **INDEPENDENT LIVING RESOURCE CENTER SAN FRANCISCO** (NON-PROFIT) FOR EDUCATION AND ADVOCACY, PEER MENTORS, AND TECHNOLOGY HELP DESK FOR PEOPLE LIVING WITH DISABILITIES

GRANT TERM: 7/1/2017-6/30/2020

| | | | | | |
|---------------|------------|--------------------|--------------|--|--|
| GRANT AMOUNT: | <u>New</u> | <u>Contingency</u> | <u>Total</u> | | |
| | \$750,000 | \$75,000 | \$825,000 | | |

| | | | | | |
|----------------|----------------|-----------------|-----------------|--|--|
| ANNUAL AMOUNT: | <u>FY17/18</u> | <u>FY 18/19</u> | <u>FY 19/20</u> | | |
| | \$250,000 | \$250,000 | \$250,000 | | |

| | | | | | |
|----------------|---------------|--------------|----------------|--------------------|--------------|
| FUNDING SOURCE | <u>County</u> | <u>State</u> | <u>Federal</u> | <u>Contingency</u> | <u>Total</u> |
| FUNDING: | \$750,000 | | | \$75,000 | \$825,000 |
| PERCENTAGE: | 100% | | | | 100% |

The Department of Aging and Adult Services (DAAS) requests authorization to enter into a new grant with Independent Living Resource Center San Francisco for the time period starting July 1, 2017 and ending on June 30, 2020, in the amount of \$750,000 plus a 10% contingency for a total amount not to exceed \$825,000. The purpose of this grant is to provide services in three areas to persons living with disabilities: (1) Education and Advocacy (2) Peer Mentors and (3) Technology Help Desk.

Services to be Provided

The Independent Living Resource Center (ILRC) will provide three main categories of services for the program:

- Education and Advocacy: ILRC’s Independent Living Academy will provide consumers with the knowledge to navigate resources, and the confidence to become community leaders in the years to come.

- The Peer Mentoring program will include recruitment, training, and matching of volunteer mentors to adults living with a disability. These relationships will increase the educational, social and recreational opportunities for consumers.
- Technology Help Desk: ILRC, working with Senior and Disability Action, will provide a range of technology resources and services to consumers with disabilities including a newly refurbished accessible computer lab. . Tech services will also include access to ILRC's Nick Feldman lending device library.

ILRC will present final program plan by Friday, August 15, 2017, for OOA review and approval. The program launch date target is September 1, 2017.

Selection

Grantee was selected through Request for Proposals (RFP) #753, which was competitively bid on February 28, 2017.

Funding

The funding is 100% from general local funds.

ATTACHMENTS

Appendix A – Services to be Provided

Appendix B - Budget – Calculation of Charges

APPENDIX A – SCOPE OF SERVICES

Independent Living Resource Center Education and Advocacy, Peer Mentors and Technology Help Desk Programs for Adults with Disabilities

July 1, 2017 to June 30, 2020

I. Purpose

The purpose of this grant is to empower people of varying abilities and disabilities to live a fully realized and integrated community life by providing specialized services to them. There are three main categories of services associated with the proposed program: (1) Education and Advocacy (2) Peer Mentors and (3) Technology Help Desk.

II. Definitions

| | |
|-----------------------|---|
| Adult with Disability | Adult aged 18+ with a disability |
| CARBON | Contracts Administration, Reporting and Billing On Line System |
| DAAS | Department of Aging and Adult Services |
| 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 |
| SOGI | Sexual Orientation and Gender Identity, a result of <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>) |
| Grantee | Independent Living Resource Center |

HSA Human Services Agency of the City and County of San Francisco

OOA Office of the Aging

III. Target Population

Adults with disabilities aged 18+ who are also residents of San Francisco.

IV. Location and Time of Services

Independent Living Resource Center is located at 825 Howard Street and runs from 9am-5pm. Senior and Disability Action, computer lab is located at 1360 Mission Street, Suite 400 run from 9am-5pm.

V. Description of Services

The contractor will provide the following three program elements and services:

1) Education and Advocacy

Grantee will develop a curriculum of specific interest and benefit to people living with disabilities with the objective of empowering people of varying abilities and disabilities to live a fully realized and integrated community life. Course offerings can include “one-off” classes as well as a class series and/or core curriculum. Grantee should consider the use of volunteer “experts” to enhance course offerings.

Course offerings and educational tracks can include the following suggested topics:

- a) Leadership Academy: classes to build confident leadership skills, public speaking, writing, leadership theory and practice.
- b) Advocacy: classes to develop advocates within the disabled community in the areas of community organizing skills, rally participation, community meetings, mailings and letters, and public testimony.
- c) Independent living skills.
- d) Resource navigation: understanding a variety of resources available, for housing, homecare, medical and legal services.
- e) Job readiness: interviewing, resume writing, business etiquette, and workplace accommodations.

2) Peer Mentors

Creation and use of a peer mentoring network provides a service delivery framework for a target population that may have difficulty accessing traditional health and social services while also having limited access to information about disability related issues and services. Peer mentor volunteers will provide

outreach and supportive services for adults with disabilities to help address these concerns. Program design should include:

- a) Development of recruitment, screening, and training practices for peer mentor volunteers prior to matching them to clients. Screening should include evaluation of a volunteer's physical and mental health status and ability to provide support as intended by this program element. Volunteers completing the screening and training process will be asked to commit to a minimum service period.
- b) On-site staff to coordinate and appropriately match volunteer peer mentors.
- c) Baseline levels for interactions between peer mentor volunteer and matched client (e.g. minimum 1 contact per week).

3) Tech Help Desk / Lab

Grantee will create a Tech Help Desk/Lab whereby accessible technology and digital literacy is available to adults with disabilities. The mission is to empower people of varying abilities and disabilities to use computers, the internet, and assistive technology. Program component should include:

- a) Computer lab consisting of 1-3 computers with voice recognition software, large text keyboards, braille translators, mouse alternatives, image readers, and other useful hardware and software tools that broaden the access to technology for adults with disabilities.
- b) The lab will be Americans with Disabilities Act compliant in its layout and the orientation of computers.
- c) Grantee shall recruit, train, manage and supervise staff, volunteers, and/or tutors to provide technology classes, workshops, and one-on-one training to adults with disabilities.
- d) If requested, Grantee will provide instruction in Chinese, Filipino, Spanish, and American Sign Language (ASL).
- e) Grantee shall create an assistive technology library where qualified clients are able to loan devices for personal use.
- f) Grantee shall develop a scholarship program, utilizing leveraged or raised funds, for adults needing financial support to purchase assistive devices/technology.
- g) Grantee will also create a referral and assistance process where clients are connected to Federal, State, or Local programs that provide financial assistance to procure such devices/technology.

VI. Contractor Responsibilities / Units of Service and Definitions

On an annual basis, the Grantee will provide the following services in each of the three components:

1. Education and Advocacy:

- a) Unduplicated Consumers. Grantee will keep a record of unduplicated consumers receiving this service.

UNIT: One unduplicated consumer who is an individual attending at least one class.

- b) Graduates. Grantee will keep a record of unduplicated consumers who complete a series of courses or curriculum meeting a minimum of class hours.

UNIT: One unduplicated consumer who has met a minimum of class hours or curriculum track.

- c) Class Hours. Grantee will keep a record of total class hours.

UNIT: One hour of class time.

2. Peer Mentoring:

- a) Unduplicated Consumers. Grantee will keep a record of unduplicated consumer receiving this service.

UNIT: One unduplicated consumer who is paired with a mentor.

- b) Volunteer Recruitment and Development. Conduct outreach to draw volunteers that will undergo formal evaluation and training, and commit to a minimum service period.

UNIT: One volunteer.

- c) Peer Mentoring. Grantee will provide peer support through the use of peer support volunteers. Peer support services include social, emotional, and practical support via regular interactions with clients.

UNIT: One hour of peer mentoring support to consumer.

3. Tech Help Desk / Lab:

- a) Unduplicated Consumers. Grantee will keep a record of unduplicated consumers receiving this service.

UNIT: One unduplicated consumer receiving services from the Tech Help Desk / Lab.

- b) Instructional Hours. Class type-instruction or one-on-one tutoring, provided by paid instructors or volunteers trained by the Grantee.

UNIT: One hour of class-type instruction or one-on-one tutoring.

VII. Deliverables/Work Product

FY 2017-2018 Grantee will:

Grantee will create program project plan, including detailed outline of each program module for classes and curriculum, peer mentoring, and tech lab. The program plan will include a staffing plan, hours and location of services, budgets, and copy of MOU with subcontractors. In addition, the plan will also include a detailed summary of data collection and reporting, and administrative plan, including how consumer data will be collected for data entry purposes. The contractor must submit the plan to OOA by Tuesday, August 1, 2017.

Based on OOA feedback, Grantee will present final program plan by Friday, August 15, 2017, for OOA review and approval. The program launch date target is September 1, 2017.

VIII. Service Objectives

FY 2017-2018 Grantee will:

On an annual basis, the Grantee will meet the following Service Objectives:

1. Education and Advocacy

- a) Provide services for 75 unduplicated consumers.
b) Provide services to 15 graduates.
c) Provide 70 class hours.

2. Peer Mentoring

- a) Provide services for 10 unduplicated consumers.
b) Provide recruitment and development to 10 volunteers.
c) Provide 500 peer mentoring hours.

3. Tech Help Desk / Lab

- a) Provide services for 100 unduplicated consumers.
b) Provide 76 instructional hours.

For FY 2018-19

1. Education and Advocacy

- a) Provide services for 75 unduplicated consumers.
- b) Provide services to 15 graduates.
- c) Provide 70 class hours.

2. Peer Mentoring

- a) Provide services for 10 unduplicated consumers.
- b) Provide recruitment and development to 10 volunteers.
- c) Provide 500 peer mentoring hours.

3. Tech Help Desk / Lab

- a) Provide services for 100 unduplicated consumers.
- b) Provide 76 instructional hours.

For FY 2019-2020

1. Education and Advocacy

- a) Provide services for 75 unduplicated consumers.
- b) Provide services to 15 graduates.
- c) Provide 70 class hours.

2. Peer Mentoring

- a) Provide services for 20 unduplicated consumers.
- b) Provide recruitment and development to 20 volunteers.
- c) Provide 500 peer mentoring hours.

3. Tech Help Desk / Lab

- a) Provide services for 100 unduplicated consumers.
- b) Provide 76 instructional hours.

IX. Outcome Objectives

On an annual basis, the Grantee will meet the following Outcome Objectives: a minimum of 50% of each services category participant will complete an annual consumer satisfaction survey.

1. Education and Advocacy:

- a) A minimum of 85% of surveyed participants report that they are satisfied with the services they received.

- b) A minimum of 85% of surveyed participants report that classes and activities have improved their overall well-being.
- c) A minimum of 85% of surveyed participants agree that the classes they participated in have made them feel more independent and self-reliant.

2. Peer Mentoring:

- a) A minimum of 85% of surveyed participants matched with a peer mentor report that the peer mentoring support has improved their overall well-being.
- b) 75% of surveyed participants matched with a peer mentor report that they received emotional support from their peer mentor.
- c) 75% of surveyed participants matched with a peer mentor report that they received information and support which allowed them to access a new service such as a government or non-profit resource, transportation, or social activity.
- d) 75% of surveyed participants matched with a peer mentor report that they received information and support which allowed them use a new technology or assistive device.

3. Tech Help Desk / Lab:

- a) A minimum of 85% of surveyed participants report that they are satisfied with the services they received.
- b) A minimum of 85% of surveyed participants report that the technology training has improved their overall well-being.
- c) A minimum of 85% of surveyed participants agree that technology training and/or assistive devices they received has made them feel more independent and self-reliant.
- d) A minimum of 85% of surveys participants agree that the technology training and/or assistive devices they received has had a positive impact in their lives.

X. 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 VII of the Services to be Provided.
- 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 each grant 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 F & G to 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 an annual summary report of SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.
- i) Grantee shall develop and deliver ad hoc reports as requested by HSA.
- j) Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- k) For assistance with reporting requirements or submission of reports, please contact:

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XI. 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, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all 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; a board of director list and

whether services are provided appropriately according to Sections VII and VIII.

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

| | A | B | C | D | E |
|----|--|--------------------|--------------------|--------------------------|--------------------|
| 1 | | | | | Appendix B, Page 1 |
| 2 | | | | | Date: 5/22/2017 |
| 3 | HUMAN SERVICES AGENCY BUDGET SUMMARY | | | | |
| 4 | BY PROGRAM | | | | |
| 5 | Name | | | Term | |
| 6 | Independent Living Resource Center San Francisco | | | 07/01/2017 to 06/30/2020 | |
| 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: Education and Advocacy, Peer Mentors and Technology Help Desk Programs for Adults with Disabilities | | | | |
| 10 | Budget Reference Page No.(s) | | | | Total |
| 11 | Program Term | 7/1/2017-6/30/2018 | 7/1/2018-6/30/2019 | 7/1/2019-6/30/2020 | 7/1/2017-6/30/2020 |
| 12 | Expenditures | | | | |
| 13 | Salaries & Benefits | \$109,967 | \$141,026 | \$141,026 | \$392,019 |
| 14 | Operating Expense | \$98,729 | \$76,366 | \$76,366 | \$251,461 |
| 15 | Subtotal | \$208,696 | \$217,392 | \$217,392 | \$643,480 |
| 16 | Indirect Percentage (%) | 15% | 15% | 15% | 15% |
| 17 | Indirect Cost (Line 16 X Line 15) | \$31,304 | \$32,608 | \$32,608 | \$96,520 |
| 18 | Capital Expenditure | \$10,000 | \$0 | \$0 | \$10,000 |
| 19 | Total Expenditures | \$250,000 | \$250,000 | \$250,000 | \$750,000 |
| 20 | HSA Revenues | | | | |
| 21 | General Fund | \$250,000 | \$250,000 | \$250,000 | \$750,000 |
| 22 | | | | | |
| 23 | | | | | |
| 24 | | | | | |
| 25 | | | | | |
| 26 | | | | | |
| 27 | | | | | |
| 28 | | | | | |
| 29 | TOTAL HSA REVENUES | \$250,000 | \$250,000 | \$250,000 | \$750,000 |
| 30 | Other Revenues | | | | |
| 31 | | | | | |
| 32 | | | | | |
| 33 | | | | | |
| 34 | | | | | |
| 35 | | | | | |
| 36 | Total Revenues | \$250,000 | \$250,000 | \$250,000 | \$750,000 |
| 37 | Full Time Equivalent (FTE) | | | | |
| 39 | Prepared by: | Telephone No.: | | Date | |
| 40 | HSA-CO Review Signature: | _____ | | | |
| 41 | HSA #1 | 10/25/2016 | | | |

| | A | B | C | D | E | F |
|----|---------------------------------|---|------------------|------------------|--------------------|--------------------|
| 1 | | | | | | |
| 2 | | | | | | Appendix B, Page 4 |
| 3 | | | | | | Date: 5/22/2017 |
| 4 | | Program Name: Education and Advocacy, Peer Mentors and Technology Help Desk Programs for Adults with Disabilities | | | | |
| 5 | | (Same as Line 9 on HSA #1) | | | | |
| 6 | | | | | | |
| 7 | | Program Expenditure Detail | | | | |
| 8 | | | | | | |
| 9 | | | | | | TOTAL |
| 10 | EQUIPMENT | TERM | 7/1/2017-6/30/18 | 7/1/2018-6/30/19 | 7/1/2019-6/30/2020 | 7/1/2017-6/30/2020 |
| 11 | No. | ITEM/DESCRIPTION | | | | |
| 12 | | 2 ADA Computer Workstations | \$10,000 | | | \$10,000 |
| 13 | | | | | | 0 |
| 14 | | | | | | 0 |
| 15 | | | | | | 0 |
| 16 | | | | | | 0 |
| 17 | | | | | | 0 |
| 18 | | | | | | 0 |
| 19 | | | | | | 0 |
| 20 | TOTAL EQUIPMENT COST | | \$10,000 | 0 | 0 | \$10,000 |
| 21 | | | | | | |
| 22 | R E M O D E L I N G | | | | | |
| 23 | Description: | | | | | 0 |
| 24 | | | | | | 0 |
| 25 | | | | | | 0 |
| 26 | | | | | | 0 |
| 27 | | | | | | 0 |
| 28 | | | | | | 0 |
| 29 | TOTAL REMODELING COST | | 0 | 0 | 0 | 0 |
| 30 | | | | | | |
| 31 | TOTAL CAPITAL EXPENDITURE | | \$10,000 | 0 | 0 | \$10,000 |
| 32 | (Equipment and Remodeling Cost) | | | | | |
| 33 | HSA #4 | | | | | 10/25/2016 |