



Mark Farrell, Mayor

Department of Human Services  
 Department of Aging and Adult Services  
 Office of Early Care and Education

Trent Rhorer, Executive Director

**MEMORANDUM**

TO: AGING AND ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

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

DATE: JUNE 6, 2018

SUBJECT: NEW GRANT: **FAMILY CAREGIVER ALLIANCE (NON-PROFIT)**  
 TO PROVIDE FAMILY CAREGIVER SUPPORT PROGRAM

GRANT TERM:	<u>New</u>	<u>Contingency</u>	<u>Total</u>		
	07/01/18-		07/01/18-		
	06/30/19		06/30/19		
GRANT AMOUNT:	\$674,696	\$67,469	\$742,165		
ANNUAL AMOUNT:	<u>FY 18/19</u>				
	\$674,696				
FUNDING SOURCE	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$287,697		\$386,999	\$67,469	\$742,165
PERCENTAGE:	43%		57%		100%

The Department of Aging & Adult Services (DAAS) requests authorization to enter into a new grant with Family Caregiver Alliance(FCA) for the time period beginning July 1, 2018 and ending June 30, 2019 in the amount of \$674,696 plus a 10% contingency for a total amount not to exceed \$742,165. The purpose of the grant is to provide family caregiver support programming to San Francisco residents who are informal caregivers.

**Background**

The Family Caregiver Support Program (FCSP) is a program created as Title III-E of the Older Americans Act. The Administration on Aging administers the program at the Federal level, and the California Department of Aging and the San Francisco Department of Aging and Adult Services (DAAS) administer the program at the state and county levels, respectively. The service design of the FCSP is to promote an effective caregiver support system by improving both caregiver’s and care recipient’s well-being, increase public support for family care and support caregivers by formal and informal community support structures. Families are the mainstay underpinning long-term care (LTC) for older persons in the United States.

### **Services to be Provided**

Grantee provides assistance to San Francisco residents age 18 years or older who are caring for an adult age 60 years or older; or individuals of any age with Alzheimer's disease or related disorder with neurologic and organic brain dysfunction.

Services provided by Grantee, Family Caregiver Alliance, include information to caregivers about available services, assistance to caregivers in gaining access to services, individual counseling, caregiver support groups, caregiver training to assist the caregivers in making decisions and solving problems relating to their care giving roles, temporary respite care to enable caregivers to be temporarily relieved from their care giving responsibilities, community outreach to make the public aware of their services, and supplemental services to complement the care provided by caregivers.

Family Caregiver Alliance will also work in collaboration and partnerships to help reach San Francisco's diverse population. They will do this by subcontracting with three multicultural/culturally sensitive San Francisco community-based organizations:

1. **Kimochi**, a long established San Francisco based non-profit organization, effectively addresses the unique needs of Japanese and Korean seniors and their caregivers who have limited resources and options available to them. For this grant Kimochi will provide Family Caregiver Support services including bi-lingual caregiver education classes independently and co-lead with FCA, bi-lingual caregiver support groups, interpretations/translation assistance and counseling.
2. **Openhouse** works to improve the health, well-being and economic security of lesbian, gay, bisexual and transgender (LGBT) seniors and adults with disabilities. Openhouse collaborates with FCA to lead the online LGBT caregiver support group. For this grant Openhouse will coordinate the volunteer-caregiver companionship and emotional support service to isolated senior and disabled community members including a support group, caregiver counseling and caregiver training, provide culturally sensitive community education, co-lead caregiver education classes with FCA, and engage in a targeted effort to identify care partners who might benefit from respite care.
3. **Self Help for the Elderly (SHE)**, a long-established San Francisco based non-profit works to promote independence, dignity, and self-worth for senior adults and their families to meet the unique needs of the Chinese and A/PI communities. For this grant SHE will facilitate the delivery of caregiver information, access, support and supplemental caregiver services targeted to low-income residents.

### **Selection**

Grantee was selected through Request for Proposals #787, which was competitively bid in March 2018.

### **Performance**

Grantee was determined to be in compliance with fiscal and programmatic requirements for FY 17/18.

**Funding**

Funding for this grant is provided by Federal and County General Funds.

**Attachments**

Appendix A, Scope of Services

Appendix B, Budget

**APPENDIX A: SERVICES TO BE PROVIDED BY GRANTEE**

**Family Caregiver Alliance**

**FAMILY CAREGIVER SUPPORT PROGRAM**

**July 1, 2018 to June 30, 2019**

**I. Purpose:**

The purpose of this grant is to assist San Francisco residents who are caregivers of older adults (60 years of age or older) or under 60 years with a diagnosis of Alzheimer’s disease by providing the caregiver a range of support resources such as Caregiver Assessment, educational material and groups, respite, individual and group counseling, case management, translation services, and information and assistance.

**II. Definitions:**

CA Getcare	A web-based application developed for DAAS staff and its service providers to maintain and track services provided and consumers served citywide. Minimum computer requirements to access the application includes Windows 2000, Internet Explorer 6.0, and Adobe Acrobat 5.0
Care Receiver – Older Adults	An older individual (60 years of age or older) or an individual (of any age) with Alzheimer’s disease or related disorder with neurological and organic brain dysfunction. [Section 302(3) of the OAA]
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
Caregiver Support	To provide individual counseling, organization of support group and caregiver training to caregivers to assist the caregiver in making decisions and solving problems relating to their care giving roles.
DAAS	Department of Aging and Adult Services of the San Francisco Human Services Agency
Division 21-100	Division 21-100 Nondiscrimination in State and Federally Assisted Programs require that grantees administer their program(s) in a nondiscriminatory manner and in compliance with civil rights obligations and to accommodate non-English-speaking or limited-English-proficient individuals and individuals with disabilities or impairments. At a minimum, grantee must <i>provide</i> the following: Procedures for informing clients of their civil rights; Policies and procedures for handling complaints filed with or against a Contractor/Grantee; Policies and procedures that

	ensure Contractors/Grantees accommodate individuals with hearing impairments, visual impairments and other disabilities; Policies and procedures that ensure that Contractors/Grantees provide appropriate language services, including a breakdown of bilingual/interpreter staff and a description of how written information is communicated to non-English speaking clients; and Policies and procedures for ensuring that Contractor staff are adequately trained in the requirements of Division 21 <a href="http://www.dss.cahwnet.gov/getinfo/pdf/3cfcman.pdf">http://www.dss.cahwnet.gov/getinfo/pdf/3cfcman.pdf</a>
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) 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 individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Family Caregiver Alliance
HSA	San Francisco Human Services Agency.
LGBT	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.
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.
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.
OOA	Office on the Aging, a unit within the Department of Aging and Adult Services of the San Francisco Human Services Agency.
Program Requirements	Program requirements found in the Older Americans Act (OOA), Title III, Part E, Sections 371 through 374. California Department of Aging Program Memorandum PM 08-03 (P).

Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent.
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 they serve (Chapter 104, Sections 104.1 through 104.9.).

### III. Target Population:

Services must target eligible caregivers as defined below who provide care to those who live in their own homes, SRO hotels, or public or senior housing within the boundaries of San Francisco County, and who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need:

- Low-income,
- Non- or limited-English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender.

### IV. Eligibility for Services:

Family caregivers of older adults must be 18 years of age or older and receivers must be:

- Age 60 years or older or
- Individuals of any age with Alzheimer's disease or related disorder with neurologic and organic brain dysfunction.

### V. Location and Time of Services:

The Family Caregiver Support Program (FCSP) services are housed at 101 Montgomery St, suite 2150. Services are provided throughout San Francisco at various times, seven days a week.

### VI. Description of Services / Service Units:

Service categories and the corresponding service units that will be funded for the Family Caregiver Support Program are listed below. Service areas, specific services, and units of measure have been established and defined by the Older Americans Act and the California Department of Aging. All possible categories of services are listed for the purpose of a comprehensive overview of the program, however, Grantee is not required to provide services in all service categories. Actual contracted service levels are listed in **bold** in corresponding service areas. Contracted Service units are to be completed on an annual basis.

In order to provide a wide range of care giving services to a diverse population of San Francisco residents, Family Caregiver Alliance sub-contracts with three San Francisco-based non-profit organizations for service provision. These organizations are Kimochi, Inc., Openhouse, and Self-Help for the Elderly. Below is a key to each agency's acronym as described throughout the service descriptions section. Family Caregiver Alliance: FCA; Kimochi, Inc.: KI; Openhouse: OH, and Self-Help for the Elderly: SHE.

### **Information Services (Caring For Elderly):**

Information Services means the provision of public information on caregiving and/or community education on caregiving, including information about available services.

- Public Information on Caregiving (Caring for Elderly) is an Information Service designed to provide information about available FCSP and other caregiver support resources and services by disseminating publications, conducting media campaigns, and maintaining electronic information systems. **UNIT: 14 FCA/6 OH/2 SHE = 22 activities**
- Community Education on Caregiving (Caring for Elderly) is an Information Service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services. **UNIT: 20 FCA/5 OH = 25 activities**

### **Access Assistance (Caring For Elderly):**

Access Assistance is the provision of caregiver outreach, caregiver information and assistance, and caregiver interpretation/translation services in order to link caregivers to the opportunities and services that are available. UNIT: 1 contact

- Caregiver Outreach (Caring for Elderly) is an Access Assistance service involving interventions (one-on-one contacts with individuals) initiated by an agency or provider for the purpose of identifying caregivers and encouraging their use of existing caregiver support services. **UNIT: 20 FCA/150 OH/125 SHE = 295 contacts**
- Caregiver Information and Assistance (Caring for Elderly) is an Access Assistance service that: (A) Provides caregivers with information on services available within the communities, including information related to assistive technology and caring for older individuals at risk of institutional placement; (B) links caregivers to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures (caregiver may remain anonymous & refuse follow-up contact). **UNIT: 185 FCA/ 110 SHE = 295 contacts**
- Caregiver Interpretation/Translation (Caring for Elderly) is an Access Assistance service for the provision of bilingual communication assistance to a caregiver in order to access assistance and receive support for his or her caregiving responsibilities (e.g., staff interpreting dialogue between caregiver and care consultant staff translating an elder's

prescription drug label for his caregiver). **UNIT: 10 FCA/200 KI/ 75 SHE = 285 contacts**

- Caregiver Legal Resources (Caring for Elderly) is an FCSP Access Assistance service involving one-to-one guidance provided by an attorney (or person under the supervision of an attorney) in the use of legal resources and services when assisting a caregiver with caregiving related legal issues. **UNIT: 36 FCA = 36 contacts**

### **Support Services (Caring For Elderly):**

Support Services is the provision of caregiver assessment, caregiver counseling, caregiver peer counseling, caregiver support groups, caregiver training, and (if necessary) caregiver case management. Unit: 1 hour

- Caregiver Assessment (Caring for Elderly) is a Support Service conducted by persons trained and experienced in the skills required to deliver the service that should result in a plan that includes emergency back-up provisions and is periodically updated; and will explore options and courses of action for caregivers by identifying their, (A) willingness to provide care; (B) duration and care frequency preferences; (C) caregiving abilities; (D) physical health, psychological, social support, and training needs; (E) financial resources relative for caregiving; (F) strengths and weaknesses within the immediate caregiving environment and (caregiver's) extended informal support system. **UNIT: 265 FCA/30 OH/ 125 SHE = 420 hours**
- Caregiver Counseling (Caring for Elderly) An FCSP Support Service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of support needed for stress, depression, and loss as a result of caregiving responsibilities. This service (A) may involve his or her informal support system; (B) may be individual direct sessions and/or telephone consultations, and (C) may address caregiving related financial and long-term care placement responsibilities. **UNIT: 260 FCA/ 325 KI/120 OH/100 SHE = 805 hours**
- Caregiver Peer Counseling (Caring for Elderly) is a Support Service provided by experienced volunteers on the condition that appropriate training and qualified supervision protocols are in place.
- Caregiver Support Group (Caring for Elderly) is a Supportive Service provided to a group of 3-12 caregivers that is led by a competent facilitator; conducted at least monthly within a supportive setting or via a controlled access, moderated online or teleconference approach; for the purpose of sharing experiences and ideas to ease the stress of caregiving and to improve decision making and problem solving related to their caregiving responsibilities. **UNIT: 36 FCA/300 KI/180 OH= 516 hours**
- Caregiver Training (Caring for Elderly) is an FCSP Supportive Service consisting of workshops or one-on-one individually tailored sessions, conducted either in person or electronically by a skilled and knowledgeable individual, to assist caregivers in



developing the skills and gaining the knowledge necessary to fulfill their caregiving responsibilities; and address the areas of health, nutrition, and financial literacy. **UNIT: 127 FCA/150 KI/ 118 OH/ 75 SHE – 470 hours**

- Caregiver Case Management (Caring for Elderly) is an FCSP Support Service provided by a person who is trained and experienced in the skills that are required to coordinate and monitor the provision of formal caregiver-related services in circumstances where caregivers are experiencing diminishing capacities due to mental impairment or temporary severe stress and/or depression. **UNIT: 40 FCA / 110 SHE = 150 hours**

### **Respite Care (Caring For Elderly):**

Respite Care is a brief period of relief or rest from caregiving responsibilities, and is provided to caregivers on an intermittent, occasional, and/or emergency basis in a manner that responds to the individual needs and preferences of the caregivers and their care receiver rather than a pre-established set amount offered on a “first come, first served” waiting list basis. Respite Care shall be provided only to a caregiver of a care receiver having two or more activities of daily living limitations or a cognitive impairment, or to a caregiver who is the grandparent or older adult relative caring for a child. Examples of temporary respite care:

*Intermittent:* Time off a few hours once a week for a limited time to give the caregiver a planned or unscheduled break.

*Occasional:* Time off for the caregiver to attend a special event.

*Emergency:* Extended break to address an intervening circumstance, such as caregiver emotional stress or hospitalization and recovery.

UNIT: 1 hour (time includes service provision and related travel).

- Caregiver Respite In-Home Supervision (Caring for Elderly) An FCSP Respite Care service that includes the provision of care receiver day and/or overnight supervision and friendly visiting by an appropriately skilled provider or volunteer in order to prevent wandering and health or safety issues. **UNIT: 1 hour**
- Caregiver Respite Homemaker Assistance (Caring for Elderly) is an FCSP Respite Care service that includes the provision of care receiver assistance with meal preparation, medication management, using the phone, and or light housework (along with care receiver supervision) by an appropriately skilled provider or volunteer. **UNIT: 1 hour**
- Caregiver Respite In-Home Personal Care (Caring for Elderly) in an FCSP Respite Care service that includes the provision of care receiver assistance with eating, bathing, toileting, transferring, and/or dressing (along with care receiver supervision and related homemaker assistance) by an appropriately skilled provider. **UNIT: 960 FCA=960 hours**

- Caregiver Respite Home Chore (Caring for Elderly) is an FCSP Respite Care service that includes an appropriately skilled provider or volunteer assisting a caregiver with heavy housework, yard work, and/or sidewalk and other routine home maintenance (but not structural repairs) associated with caregiving responsibilities. UNIT: 1 hour
- Caregiver Respite Out-of-Home Day Care (Caring for Elderly) is Respite Care service where the care receiver attends a supervised/protective, congregate setting during some portion of a day, and includes access to social and recreational activities. UNIT: 1 hour

Caregiver Respite Out-of-Home Overnight (Caring for Elderly) is an FCSP Respite Care service where the care receiver is temporarily placed in a supervised/protective, residential setting for one or more nights, and may include access to nursing and personal care. UNIT: 1 hour

### **Supplemental Services (Caring For Elderly)**

Supplemental Services means caregiver-centered assistance offered on a limited basis to support and strengthen the caregiving efforts. Supplemental Services shall be provided only to a caregiver of a care receiver having two or more activities of daily living limitations or a cognitive impairment, or to a caregiver who is the grandparent or older adult relative caring for a child. UNIT: 1 device is 1 occurrence

Assistive Devices for Caregiving (Caring for Elderly) is an FCSP Supplemental Service involving the purchase, rental and/or service fee of any equipment or product system (ranging from a lift chair or bathtub transfer bench to an electronic pill dispenser or emergency alert fall prevention device that will facilitate and enhance the caregiving role. **UNIT: 5 SHE = 5 occurrences**

- Home Adaptations for Caregiving (Caring for Elderly) is an FCSP Supplemental Service that makes any minor or major physical change to the home in order to facilitate and enhance the caregiving role (ranging from installation of grab bars or replacement of door handles to construction of an entrance ramp or roll-in shower) in order to fulfill caregiving responsibilities. UNIT: 1 modification is 1 occurrence
- Caregiving Services Registry (Caring for Elderly) is an FCSP Supplemental Service that recruits, screens, and maintains a listing of dependable, qualified self-employed homemaker or respite care workers who may be matched with caregivers willing to utilize personal resources to pay for assistance with their caregiving responsibilities. Both the caregiver and self-employed worker will be (A) advised about appropriate compensation and workplace performance expectations; and (B) provided with follow-up to ensure the match is functioning effectively. **UNIT: 75 KI = 75 occurrences**
- Caregiving Emergency Cash/Material Aid (Caring for Elderly) is a Supplemental Service that arranges for and provides assistance to caregivers in the form of commodities,

surplus food, emergency cash, discount cards, and vouchers that will help meet identified needs associated with an individual caregiver's responsibilities. Unit definition: one assistance for one caregiver equals one occurrence. **UNIT: FCA 10 = 10 occurrences**

## **VII. Outcome Objectives:**

1. At least 75% of program participants responding to the annual consumer satisfaction survey will indicate that they received the services offered by the agency and the services were appropriate, relevant, and adequate.
2. At least 75% of program participants responding to the annual consumer satisfaction survey will report reduced stress and an increased sense of feeling cared about/valued after one year of receipt of services.
3. At least 75% of program participants responding to the annual consumer satisfaction survey will indicate they feel better able to be a caregiver due to the services received.
4. At least 75% of program participants responding to the annual consumer satisfaction survey will indicate they learned of new service offerings that they were not previously aware of being offered.
5. At least 90% of consumers seeking services will be served.

## **VIII. Reporting Requirements:**

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

- A. Grantee will enter into CA-GetCare all the units of service in the Service Recording Tool and data for client-level service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- B. 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 of the Services to be provided.
- C. 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.
- D. Grantee will provide annual consumer satisfaction survey results to OOA by March 15 each grant year, with at least thirty-five percent (35%) of caregiver participants responding to the annual consumer satisfaction survey.

- E. Grantee will provide other reports as requested.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- G. Apart from the on-line reporting via CA GetCare and CARBON, and report requested to be sent via e-mail to the Program Manager and/or Contract Manager, all other reports should be sent to the following addresses:

Monte Cimino, Program Manager  
DAAS, Office on the Aging  
PO Box 7988  
San Francisco, CA 94120  
E-mail address: monte.cimino@sfgov.org

David Kashani  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120  
Email address: david.kashani@sfgov.org

**IX. Monitoring Activities:**

- A. Program Monitoring: Program monitoring will include review of 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 according to the site chart; and whether services are provided appropriately according to Sections 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, the current board roster and selected board minutes for compliance with the Sunshine Ordinance, and HIPAA compliance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4				
5	Name	Term		
6	FAMILY CAREGIVER ALLIANCE	7/1/18-6/30/19		
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:			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	Total	
12	<b>Expenditures</b>			
13	Salaries & Benefits	\$261,248	\$261,248	
14	Operating Expenses	\$176,566	\$176,566	
15	<b>Subtotal</b>	\$437,814	\$437,814	
16	Indirect Percentage (%)	10%	10%	
17	Indirect Cost (Line 16 X Line 15)	\$43,782	\$43,782	
18	Capital/Subcontractor Expenditures	\$193,100	\$193,100	
19	Total Expenditures	\$674,696	\$674,696	
20	<b>HSA Revenues</b>			
21				
22	General Fund	\$287,697	\$287,697	
23	CFDA 93.052	\$386,999	\$386,999	
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$674,696	\$674,696	
30	<b>Other Revenues</b>			
31				
32				
33				
34				
35				
36	Total Revenues	\$674,696	\$674,696	
37	Full Time Equivalent (FTE)			
39	Prepared by: Stephen Hu	Telephone No.: 415-434-3388	Date: 05/11/2018	
40	HSA-CO Review Signature: _____			
41	HSA #1			10/25/2016

	A	B	C	D	E	F	G
1							
2							
3							
4	Program:						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10						7/1/18-6/30/19	7/1/18-6/30/19
11							
		Agency Totals		HSA Program		DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary
12	POSITION TITLE						
13	Dir of Programs - M. Venegas	\$81,077	100%	16%	0.16	\$13,059	\$13,059
14	Family Consultant - Anne Roche	\$52,500	100%	71%	0.71	\$37,079	\$37,079
15	Family Consult/Clinical Sup - Christina Irving	\$58,000	100%	29%	0.29	\$16,624	\$16,624
16	Family Consultant - Adriana Sanchez	\$42,000	100%	33%	0.33	\$13,750	\$13,750
17	Family Consultant - Amanda Hartrey	\$52,650	100%	2%	0.02	\$1,000	\$1,000
18	Family Consultant - Jo McCord	\$55,965	100%	2%	0.02	\$1,000	\$1,000
19	Resource/Latino Outreach Coordinator (Intake) - Adriana Sanchez & TBH	\$40,000	100%	14%	0.14	\$5,710	\$5,710
20	Education Coord - Christopher Hu	\$40,000	100%	27%	0.27	\$10,800	\$10,800
21	Program/Fiscal Asst - Cassandra Castillo	\$40,000	100%	25%	0.25	\$10,000	\$10,000
22	Act Mgr.Acct/Vouchered Svs - Maria Tolkunov-Trubkina	\$66,000	100%	22%	0.22	\$14,700	\$14,700
23	Operations & Planning Director Leah Eskenazi	\$88,500	100%	17%	0.17	\$15,282	\$15,282
24	Reception/Adm Asst(Intake Reception) - Leslie Braverman	\$36,075	100%	15%	0.15	\$5,476	\$5,476
25	E-Communications Specialist - Francesca Pera	\$53,850	100%	14%	0.14	\$7,457	\$7,457
26	Assi Communications Specialist (TBH)	\$40,000	100%	16%	0.16	\$6,500	\$6,500
27	Community Outreach Specialist - Tony Tran	\$60,000	100%	60%	0.60	\$36,000	\$36,000
28	Sr Program Mgr (Exec Dir) - K Kelly	\$120,750	100%	5%	0.05	\$5,530	\$5,530
29							
30	TOTALS	\$927,367	16.00	368%	3.68	\$199,968	\$199,968
31							
32	FRINGE BENEFIT RATE	31%					
33	EMPLOYEE FRINGE BENEFITS	\$284,182				\$61,280	\$61,280
34							
35							
36	TOTAL SALARIES & BENEFITS	\$1,211,549				\$261,248	\$261,248
37	HSA #2						10/25/2016

	A	B	C	D	E	F	G
1							
2							
3							
4	Program:						
5	(Same as Line 9 on HSA #1)						
6							
7							
8							
9							
10							
11							TOTAL
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>		<u>7/1/18-6/30/19</u>
13	Rental of Property				\$53,360		\$53,360
14	Telecommunications (Phones, Omline Access, Web Services, Web Programming & Maint)				\$16,300		\$16,300
15	Office Supplies, Postage				\$6,650		\$6,650
16	Software Systems License				\$12,000		\$12,000
17	Printing and Reproduction				\$500		\$500
18	Insurance				\$2,300		\$2,300
19	Staff Training				\$2,000		\$2,000
20	Staff Travel-(Local & Out of Town)				\$2,300		\$2,300
21	Rental of Equipment				\$2,700		\$2,700
22							
23	<b>CONSULTANTS</b>						
24	Family Consultant - Contract				\$11,960		\$11,960
25	Audit				\$5,000		\$5,000
26							
27	<b>OTHER</b>						
28	Respite				\$38,296		\$38,296
29	Legal Services				\$3,200		\$3,200
30	Caregiver Education Events				\$3,000		\$3,000
31	Publications & Translations				\$15,000		\$15,000
32	Computer Equipment (each under \$500)				\$2,000		\$2,000
33							
34							
35							
36	<b>TOTAL OPERATING EXPENSE</b>				<b>\$176,566</b>		<b>\$176,566</b>
37							
38	<b>HSA #3</b>						<b>10/25/2016</b>



	A	B	C	D
1			Appendix B, Page 4	
2				
3				
4	Program:			
5	(Same as Line 9 on HSA #1)			
6		<b>Program Expenditure Detail</b>		
7	<b>SUBCONTRACTORS</b>		7/1/18-6/30/19	7/1/18-6/30/19
8		Self Help for the Elderly	\$88,000	\$88,000
9		Kimochi	\$70,000	\$70,000
10		Open House	\$35,100	\$35,100
11	<b>TOTAL SUBCONTRACTOR COST</b>		\$193,100	\$193,100
12				
13	<b>EQUIPMENT</b>	<b>TERM</b>	7/1/18-6/30/19	7/1/18-6/30/19
14	No.	ITEM/DESCRIPTION		
15				\$0
16				\$0
17				\$0
18	<b>TOTAL EQUIPMENT COST</b>		\$0	\$0
19				
20	<b>REMODELING</b>			
21	Description:		7/1/18-6/30/19	7/1/18-6/30/19
22				\$0
23				\$0
24				\$0
25	<b>TOTAL REMODELING COST</b>		\$0	\$0
26				
27	<b>TOTAL CAPITAL/SUBCONTRACTOR EXPENDITURE</b>		\$193,100	\$193,100
28				
29	HSA #4			10/25/2016