



MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

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

DATE: JUNE 20, 2018

SUBJECT: NEW GRANTS: **MULTIPLE GRANTEES** for AGING & DISABILITY RESOURCE CENTERS (ADRC)
-see table on the next page

GRANT TERM(S):	<u>7/1/18- 6/30/19</u>	<u>7/1/19- 6/30/20</u>	<u>Contingency</u>	<u>Total</u>	
GRANT AMOUNTS:	\$1,162,423	\$1,162,423	\$232,482	\$2,557,328	
Source:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
Funding:	\$2,022,616		\$302,230	\$232,482	\$2,557,328
Percentage	87%		13%		100%

The Department of Aging and Adult Services requests authorization to enter into new grant agreements with multiple providers for the provision of Aging and Disability Resource Centers (ADRC) for the time period beginning July 1, 2018 and ending June 30, 2020 in the combined amount of \$2,324,846, plus a 10% contingency for a total not to exceed amount of \$2,557,328. The funding amounts are detailed in the following table:

Grantee	FY 18/19	FY 19/20	Total FY 18-20	10% Contingency	Total Not to Exceed
Bayview Senior Services	\$127,310	\$127,310	\$254,620	\$25,462	\$280,082
Catholic Charities	\$76,691	\$76,691	\$153,382	\$15,338	\$168,720
Golden Gate Senior Services	\$73,452	\$73,452	\$146,904	\$14,690	\$161,594
Institute on Aging	\$120,122	\$120,122	\$240,244	\$24,024	\$264,268
Mission Neighborhood Centers	\$80,189	\$80,189	\$160,378	\$16,038	\$176,416
Northern California Presbyterian Homes & Services	\$155,041	\$155,041	\$310,082	\$31,008	\$341,090
On Lok Day Services / 30th Street Senior Center	\$103,714	\$103,714	\$207,428	\$20,742	\$228,170
Openhouse	\$75,051	\$75,051	\$150,102	\$15,010	\$165,112
Self Help for the Elderly	\$295,000	\$295,000	\$590,000	\$59,000	\$649,000
Toolworks	\$55,853	\$55,853	\$111,706	\$11,170	122,876
Total	\$1,162,423	\$1,162,423	\$2,324,846	\$232,482	\$2,557,328

Background

The Aging and Disability Resource Center serves as a one-stop shop for information, referral and assistance services for older people and adults with disabilities. Specifically, ADRCs around the City provide services that assist people to continue living independently in the community, connecting them with long-term services and supports. ADRCs are located throughout the City and each ADRC has trained staff and on-site supervisors. Some districts have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. Each ADRC must demonstrate the capability to serve older people and adults with disabilities in their supervisory district and neighboring districts, if applicable.

Services to be Provided

Aging and Disability Resource Center (ADRC):

The ADRC provides one-stop shop access to information, assistance and translation services for older people, adults with disabilities, and caregivers at key neighborhood locations. ADRC staff work in multiple sites which are already hubs for older people and adults with disabilities accessing other services. The ADRC staff provide services 5 days a week. An additional Citywide ADRC Coordinator meets with staff employed by ADRC sites on a weekly and monthly basis. This coordinator is responsible for providing training, clinical consultation, and executing an outreach plan for the ADRC sites. Day-to-day supervision is provided by the on-site supervisor of the ADRC. The Citywide ADRC Coordinator and on-site supervisor meet monthly to avoid any issues of dual consultation/support.

Grantee	Unduplicated Clients (S/YAD)
Bayview Senior Services	2,000 (1,800 Seniors/200 YAD)
Catholic Charities	1,200 (1,120 Seniors/80 YAD)
Golden Gate Senior Services	1,200 (1,080 Seniors/120 YAD)
Mission Neighborhood Centers	900 (810 Seniors/90 YAD)
Northern California Presbyterian Homes & Services	2,000 (1,800 Seniors/200 YAD)
On Lok Day Services / 30th Street Senior Center	1,600 (1,360 Seniors/240 YAD)
Openhouse	1,200 (1,080 Seniors/120 YAD)
Self Help for the Elderly	5,220 (4,770 Seniors/450 YAD)
Toolworks	1,200 (360 seniors/840 YAD)

Citywide ADRC Coordinator:

The Citywide ADRC Coordinator contributes to the knowledge, helps develop skills, and consults on the performance of ADRC staff working with seniors and adults with disabilities. The coordinator works with ADRC staff on offering information and referral, assistance, and follow-up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff. The specifics of either consultation model are worked out with each specific agency. This flexibility allows for the service model to respond to the culture of each organization.

The Citywide ADRC Coordinator provides resources by bringing together ADRC staff from a variety of agencies for group and individual consultation meetings and administrative trainings. In general, the coordinator provides more focused and advanced trainings and consultation opportunities than can often be provided by most community organizations.

Performance Monitoring

All Grantees were determined to be in compliance with fiscal and programmatic requirements for FY 16/17 & FY 17/18 for DAAS contracts held. Programmatic monitoring is conducted throughout the year. Fiscal monitoring occurred as follows:

1. Bayview Hunters Point Multipurpose Senior Services; monitored in March 2018
2. Catholic Charities; monitored in March 2018.
3. Golden Gate Senior Services; monitored in April 2017; waiver in 2018
4. Institute on Aging; monitored in April 2018
5. Mission Neighborhood Centers; monitored in March 2018
6. Northern California Presbyterian Homes & Services; monitored in April 2017
7. On Lok; monitored in April 2017
8. Open House; monitored in March 2017
9. Self Help for the Elderly; monitored in March 2018
10. Toolworks; monitored in January 2018

Grantee Selections

Grantees were selected through Request for Proposal (RFP) #798 issued April 2018, for Aging and Disability Resource Centers (ADRC).

Funding

The funding is 87% County General Fund and 13% Federal Fund.

Attachments:

Bayview Hunter's Point Multipurpose Senior Services

Appendix A-Services to be Provided

Appendix B- Program Budget

Catholic Charities of San Francisco

Appendix A-Services to be Provided

Appendix B- Program Budget

Golden Gate Senior Services

Appendix A-Services to be Provided

Appendix B- Program Budget

Institute on Aging

Appendix A-Services to be Provided

Appendix B- Program Budget

Mission Neighborhood Centers

Appendix A-Services to be Provided

Appendix B- Program Budget

Northern California Presbyterian Homes & Services

Appendix A-Services to be Provided

Appendix B- Program Budget

On Lok Day Services / 30th Street Senior Center

Appendix A-Services to be Provided

Appendix B- Program Budget

Openhouse

Appendix A-Services to be Provided

Appendix B- Program Budget

San Francisco Senior Center (NCPHS)

Appendix A-Services to be Provided

Appendix B- Program Budget

Toolworks

Appendix A-Services to be Provided

Appendix B- Program Budget

**APPENDIX A – SERVICES TO BE PROVIDED
BAYVIEW SENIOR SERVICES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2018 to June 30, 2020**

The grantee will provide information, assistance and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities and caregivers in the community.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	Bayview Senior Services
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult	Person who is 60 years of age or older
SF GetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.)
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in SF GetCare.

II. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Lesbian/Gay/Bisexual/Transgender

III. Location and Time of Services

The location for services will be 1753 Carroll Avenue, San Francisco CA 94124 and 1390-1/2 Turk Street, San Francisco, CA 94115. Hours of Operation: Monday-Friday, 9am-5pm.

IV. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. ADRCs must provide a minimum of 0.8 FTE staffing.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC center on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

ADRC will provide:

- Client needs assessment;
- Information of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation;
- Assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
- Follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 0.8 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Outreach through presentations and events to spread awareness of both ADRC and DAAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- If applicable, based on the location of the ADRC, the ADRC staff will coordinate with the Citywide ADRC Coordinator and the local Housing Authority sites to introduce services to residents through presentations and/or fairs.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.

- Ensure that ADRC staff and clients have private space to meet that includes a computer to enter in data and research available resources.

V. Service Objectives

Each grantee will report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF.GetCare.
- At least one training or outreach event per quarter to ensure community awareness of DAAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Bayview Senior Services ADRC:

- Will serve 1,800 unduplicated older adults.
- Will serve 200 unduplicated adults with disabilities.
- Will provide 6,000 units of Information and Referral services.
- Will provide 4,000 service units of Assistance.
- Will provide 800 units of Follow-Up services.

VI. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report learning of the community resources and/or connection to services.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report they obtained the assistance requested in filling out an application for some type of financial benefit (e.g., Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc.) and will be able to submit the application for the program and/or obtain the financial assistance.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 10% of new clients utilizing the ADRC services will have heard about the ADRCs from an Outreach event.

VII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section V & VI- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.

- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
 Department of Aging and Adult Services
 2 Gough Street, 2nd floor
 San Francisco, CA 94103
 E:mail address: dana.leavitt@sfgov.org

Steve Kim, Contract Manager (GB15)
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: steve.kim@sfgov.org

VIII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list and whether services are provided appropriately according to Sections V and VI.
- 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, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			Term
6	Bayview Senior Services			7/1/18-6/30/20
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: ADRC Districts 5 & 10			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	7/1/19-6/30/20	Total
12	Expenditures			
13	Salaries & Benefits	\$113,684	\$113,684	\$227,368
14	Operating Expense	\$0	\$0	\$0
15	Subtotal	\$113,684	\$113,684	\$227,368
16	Indirect Percentage (12%)	12%	12%	\$0
17	Indirect Cost (Line 16 X Line 15)	\$13,626	\$13,626	\$27,252
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$127,310	\$127,310	\$254,620
20	HSA Revenues			
21	General Fund (87%)	\$110,760	\$110,760	\$221,520
22	CFDA 93.778 (13%) - ADRC	\$16,550	\$16,550	\$33,100
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES			
30	Other Revenues			
31		\$127,310	\$127,310	\$254,620
32				
33				
34				
35				
36	Total Revenues	\$127,310	\$127,310	\$254,620
37	Full Time Equivalent (FTE)	2.00	2.00	
39	Prepared by: Cathy Davis, Executive Director		Telephone No.: 415-822-1444	
40	HSA-CO Review Signature: _____			
41	HSA #1			6/20/2018

**APPENDIX A—SERVICES TO BE PROVIDED
CATHOLIC CHARITIES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2018 to June 30, 2020**

The grantee will provide information, assistance and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities and caregivers in the community.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	Catholic Charities
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult	Person who is 60 years of age or older
SF GetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.)
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in SF GetCare.

II. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Lesbian/Gay/Bisexual/Transgender

III. Location and Time of Services

The location for Catholic Charities: OMI Senior Center, 65 Beverly Street, San Francisco CA 94132.
Hours of Operation: 8:30am-5pm., Monday-Friday.

IV. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. ADRCs must provide a minimum of 0.8 FTE staffing.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC center on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

ADRC will provide:

- Client needs assessment;
- Information of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation;
- Assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
- Follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 0.8 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Outreach through presentations and events to spread awareness of both ADRC and DAAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- If applicable, based on the location of the ADRC, the ADRC staff will coordinate with the Citywide ADRC Coordinator and the local Housing Authority sites to introduce services to residents through presentations and/or fairs.

- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- Ensure that ADRC staff and clients have private space to meet that includes a computer to enter in data and research available resources.

V. Service Objectives

ADRC Service Objectives

Each grantee will report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF.GetCare.
- At least one training or outreach event per quarter to ensure community awareness of DAAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Catholic Charities CYO ADRC:

- Will serve **1,120** unduplicated older adults.
- Will serve **80** unduplicated adults with disabilities.
- Will provide **1,500** units of Information and Referral services.
- Will provide **1,300** service units of Assistance.
- Will provide **400** units of Follow-Up services.

VI. ADRC Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report learning of the community resources and/or connection to services.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report they obtained the assistance requested in filling out an application for some type of financial benefit (e.g., Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc.) and will be able to submit the application for the program and/or obtain the financial assistance.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 10% of new clients utilizing the ADRC services will have heard about the ADRCs from an Outreach event.

VII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section V & VI- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
 Department of Aging and Adult Services
 2 Gough Street, 2nd floor
 San Francisco, CA 94103
 E:mail address: dana.leavitt@sfgov.org

Esperanza Zapien, Contract Manager (GB10)
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: Esperanza.Zapien@sfgov.org

VIII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list and whether services are provided appropriately according to Sections V and VI.

- 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	E
1	Appendix B, Page 1				
2	HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM				
3					
4					
5					
6	Catholic Charities			7/1/18 - 6/30/20	
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: Aging and Disability Resource Center (ADRC)				
10	Budget Reference Page No.(s)				Total
11	Program Term	7/1/18-6/30/19	7/1/19-6/30/20		7/1/18-6/30/20
12	Expenditures				
13	Salaries & Benefits	\$65,590	\$65,590		\$131,180
14	Operating Expense	\$1,535	\$1,535		\$3,070
15	Subtotal	\$67,125	\$67,125		\$134,250
16	Indirect Percentage (%)	14.25%	14.25%		\$0
17	Indirect Cost (Line 16 X Line 15)	\$9,566	\$9,566		\$19,132
18	Capital Expenditure	\$0	\$0		\$0
19	Total Expenditures	\$76,691	\$76,691		\$153,382
20	HSA Revenues				
21	General Fund (87%)	\$66,721	\$66,721		\$133,442
22	CFDA 93.778 (13%) - ADRC	\$9,970	\$9,970		\$19,940
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$76,691	\$76,691		\$153,382
30	Other Revenues				
31					
32					
33	Foundation / Grants	\$5,000	\$5,000		\$10,000
34	In-Kind / Donations	\$17,000	\$17,000		\$34,000
35					
36	Total Revenues	\$98,691	\$98,691		\$197,382
37	Full Time Equivalent (FTE)	1.17	1.17		
39	Prepared by: Patty Clement/Rosa Mendez	Telephone No.: 415-452-3504		Date 4/27/18	
40	HSA-CO Review Signature: _____				
41	HSA #1				10/25/2016

	A	B	C	D	E	F	G	H	I	J	K
1	Appendix B, Page 3										
2											
3											
4	Catholic Charities										
5	Aging and Disability Resource Center (ADRC)										
6											
7	Operating Expense Detail										
8											
9											
10											
11	TOTAL										
12	Expenditure Category		TERM	<u>7/1/18-6/30/19</u>	<u>7/1/19-6/30/20</u>						<u>7/1/18-6/30/20</u>
13	Rental of Property										
14	Utilities(Elec, Water, Gas, Phone, Garbage)		\$	1,066	\$	1,066					\$ 2,132
15	Office Supplies, Postage										
16	Building Maintenance Supplies and Repair										
17	Printing and Reproduction										
18	Insurance		\$	169	\$	169					\$ 338
19	Staff Training										
20	Staff Travel-(Local & Out of Town)		\$	300	\$	300					\$ 600
21	Rental of Equipment										
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE										
23											
24											
25											
26											
27											
28	OTHER										
29											
30											
31											
32											
33											
34											
35	TOTAL OPERATING EXPENSE		\$	1,535	\$	1,535	\$	-			\$ 3,070
36											
37	HSA #3										10/25/2016

APPENDIX A –SERVICES TO BE PROVIDED
GOLDEN GATE SENIOR SERVICES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)

July 1, 2018 to June 30, 2020

The grantee will provide information, assistance and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities and caregivers in the community.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client’s needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.

Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	Golden Gate Senior Services
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult	Person who is 60 years of age or older

SF GetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.)
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee’s ADRC program and reflected in SF GetCare.

II. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Lesbian/Gay/Bisexual/Transgender

III. Location and Time of Services

The location for Golden Gate Senior Services: Richmond Senior Center will be located at 6221 Geary Blvd., San Francisco CA 94121. Hours of Operation: Monday-Friday, 8:30am-4:30pm.

IV. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. ADRCs must provide a minimum of 0.8 FTE staffing.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC center on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

ADRC will provide:

- Client needs assessment;
- Information of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation;
- Assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
- Follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 0.8 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Outreach through presentations and events to spread awareness of both ADRC and DAAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- If applicable, based on the location of the ADRC, the ADRC staff will coordinate with the Citywide ADRC Coordinator and the local Housing Authority sites to introduce services to residents through presentations and/or fairs.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- Ensure that ADRC staff and clients have private space to meet that includes a computer to enter in data and research available resources.

V. Service Objectives

ADRC Service Objectives:

Each grantee will report on the following service objectives on a quarterly basis:

- Ensure that at least **10%** of the clients served at each ADRC are younger adults with disabilities.
- At least **65%** of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF GetCare.
- At least **one** training or outreach event per quarter to ensure community awareness of DAAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Golden Gate Senior Services ADRC:

- Will serve **1,080** unduplicated older adults.
- Will serve **120** unduplicated adults with disabilities.
- Will provide **1,160** units of Information and Referral services.
- Will provide **1,300** service units of Assistance.
- Will provide **400** units of Follow-Up services.

VI. ADRC Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report learning of the community resources and/or connection to services.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report they obtained the assistance requested in filling out an application for some type of financial benefit (e.g., Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc.) and will be able to submit the application for the program and/or obtain the financial assistance.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 10% of new clients utilizing the ADRC services will have heard about the ADRCs from an Outreach event.

VII. Reporting Requirements

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

- A. Grantee will provide a monthly report of activities, referencing the tasks as described in Section V & VI- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
Department of Aging and Adult Services
2 Gough Street, 2nd floor
San Francisco, CA 94103
Email address: Dana.Leavitt@sfgov.org

Ella Lee, Contract Manager (GB18)
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: Ella.Lee@sfgov.org

VIII. Monitoring Activities

- A. **Program Monitoring:** Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list and whether services are provided appropriately according to Sections V and VI.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name		Term	
Golden Gate Senior Services		7/1/2018 - 6/30/2020	
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
If modification, Effective Date of Mod. No. of Mod.			
Program: Aging and Disability Resource Centers (ADRC)			
Budget Reference Page No.(s)			
Program Term	7/1/2018 - 6/30/2019	7/1/2019 - 6/30/2020	Total
Expenditures			
Salaries & Benefits	\$62,569	\$62,569	\$125,138
Operating Expenses	\$1,302	\$1,302	\$2,604
Subtotal	\$63,871	\$63,871	\$127,742
Indirect Percentage (%)	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$9,581	\$9,581	\$19,162
Subcontractor/Capital Expenditures			
TOTAL EXPENDITURES	\$73,452	\$73,452	\$146,904
HSA Revenues			
General Fund (87%)	\$63,903	\$63,903	\$127,806
CFDA #93.778 (13%) - ADRC	\$9,549	\$9,549	\$19,098
Total HSA Revenues	\$73,452	\$73,452	\$146,904
Other Revenues			
TOTAL OTHER REVENUES			
TOTAL REVENUES	\$73,452	\$73,452	\$146,904
Full Time Equivalent (FTE)	1.05	1.05	
Prepared by: Kaleda Walling Telephone No.: 415-405-4660			
HSA-CO Review Signature: _____			
HSA #1			6/4/2018

Golden Gate Senior Services

Program: Aging and Disability Resource Centers (ADRC)

(Same as Line 9 on HSA #1)

Salaries & Benefits Detail

Position Title	Agency Totals		HSA Program		DAAS		
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	7/1/2018 - 6/30/2019 Budgeted Salary	7/1/2019 - 6/30/2020 Budgeted Salary	7/1/2018 - 6/30/2020 Total Budgeted Salary
I&A Specialist I Cantonese/Mandarin	\$45,040	0.50	100%	0.50	\$22,520	\$22,520	\$45,040
I&A Specialist I Russian/English	\$46,392	0.50	100%	0.50	\$23,196	\$23,196	\$46,392
RSC Director	\$82,800	1.00	5%	0.05	\$4,140	\$4,140	\$8,280
Totals	\$174,232	2.00	205%	1.05	\$49,856	\$49,856	\$99,712
Fringe Benefit Rate	26%						
Employee Fringe Benefit	\$44,429				\$12,713	\$12,713	\$25,426
TOTAL SALARIES & BENEFITS	\$218,661				\$62,569	\$62,569	\$125,138

HSA #2

6/4/2018

Golden Gate Senior Services

Program: Aging and Disability Resource Centers (ADRC)

(Same as Line 9 on HSA #1)

Operating Expense Detail

Expenditure Category	TERM	Total	
		7/1/2018 - 6/30/2019	7/1/2019 - 6/30/2020
Rental of Property			
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,302	\$1,302
Office Supplies, Postage			
Building Maintenance Supplies and Repair			
Printing and Reproduction			
Insurance			
Staff Training			
Staff Travel-(Local & Out of Town)			
Rental of Equipment			
<u>Consultants</u>			
<u>Other</u>			
TOTAL OPERATING EXPENSE		\$1,302	\$1,302

HSA #3

6/4/2018

**APPENDIX A—SERVICES TO BE PROVIDED
INSTITUTE ON AGING
CITYWIDE AGING AND DISABILITY RESOURCE CENTER (ADRC) COORDINATOR**

July 1, 2018 to June 30, 2020

The grantee will provide training and administrative consultation to ADRC staff, as well as coordinating and executing an ADRC outreach plan.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	Institute On Aging
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult/Older person	Person who is 60 years of age or older
SFGetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.)
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

II. Target Population

The intended recipients of the services provided by the Citywide ADRC Coordinator are DAAS funded community ADRC staff working with older adults and adults with disabilities.

III. Eligibility for ADRC Services

DAAS funded ADRC staff working with older adults and adults with disabilities are eligible for Citywide ADRC Coordinator services.

IV. Location and Time of Services

Group and individual consultation, and didactic trainings, will be delivered at each ADRC. Exact schedule and location will be determined in conjunction with the ADRC staff and their on-site supervisors.

The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff. The specifics of either consultation mode will be worked out with each specific agency. This flexibility allows for the service model to respond to the culture of each organization.

V. Description of Services

A. Responsibilities

The Grantee shall provide individual and group administrative support, didactic and administrative training, chart and documentation review, and an opportunity for professional networking/resource sharing. The Grantee shall be responsible for arranging for and identifying necessary outreach efforts to promote significant utilization of ADRCs in neighborhoods throughout the City, advertising Information and Assistance services in coordination with ADRC staff. The Citywide ADRC Coordinator shall monitor the effectiveness of services at each outstation (e.g., conducting timely follow up activities, appropriateness of referrals, adequate service levels), providing feedback to the DAAS contract monitor as needed. The ADRC is a “no wrong door” model for consumers to access long term care services and supports. It is a partnership between DAAS, the Citywide ADRC Coordinator and the ADRCs throughout San Francisco.

The Citywide ADRC Coordinator provides, at a minimum, the following:

- Monthly group consultation for all ADRC staff. Group meetings provide case consultation, topic specific training, and review of core tasks and standards of Information and Assistance concepts to improve the ADRC staffs general performance as well as their ability to work with clients (e.g., recognizing case management and other social service needs of clients and the need for follow-up with clients). For group consultation, the Citywide ADRC Coordinator will also bring in outside experts and trainers to expand knowledge of resources, geriatric and disability related topics, and improving skills in assessments, effective follow-up, and managing challenging client issues. An added benefit of the group consultation context is the camaraderie that develops between participants encouraging resource sharing, cross agency referrals, and peer review and guidance.

- Deliver weekly individual and administrative consultation to ADRC staff. Individual consultation sessions emphasize specific ADRC staff performance issues, challenging client issues and offer guidance for maintaining quality Information and Assistance services. In addition, individual consultation provides a forum to address and improve charting and documentation issues.
- Meet with ADRC site supervisors on a quarterly basis to ensure coordination between the Citywide ADRC Coordinator and the day to day ADRC site supervisors in order to make programs more effective and avoid any problems of “dual support.”
- Develop and maintain outreach plan and materials for ADRC staff collaboration. The plan will identify targets for increased utilization of ADRC services in historically underserved neighborhoods. The plan will, at a minimum, develop and identify outreach events in conjunction with other ADRC partners, updating outreach events monthly.
- Arrange for the execution of outreach events, providing outreach through presentations and fairs, and partnering with ADRC staff and/or DAAS to staff events.
- Provide training and consultation to the ADRC staff regarding the ADRC services.
- Designate at least one 0.8 FTE as the Citywide ADRC Coordinator and provide back-up staff in case of any absence.
- Ensure that the Citywide ADRC Coordinator has the technology and systems available to meet the needs of training, consulting and coordinating the ADRC staff.

VI. Service Objectives

Citywide ADRC Coordinator Service Objectives:

- Ensure that 90% of weekly individual ADRC staff consultations occur and that 100% of monthly ADRC staff group meetings occur.
- Ensure that 90% of quarterly individual meetings with the ADRC on-site supervisors of the participating agencies occur.
- Complete Outreach plan calendar monthly.

VII. Outcome Objectives

Citywide ADRC Coordinator Outcome Objectives:

- Based on a yearly ADRC staff survey, created by DAAS, at least 95% of the surveyed ADRC staff will report satisfaction with the training, support, consultation and coordination provided.
- Based on a yearly ADRC staff survey, created by DAAS, at least 95% of the surveyed ADRC staff will report they were able to provide better service to clients due to the training, support, consultation and coordination provided by the Citywide ADRC Coordinator.

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.

- B. Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- 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 of each year.
- D. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- E. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- H. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
 Department of Aging and Adult Services
 2 Gough Street, 2nd floor
 San Francisco, CA 94103
 E:mail address: dana.leavitt@sfgov.org

David Kashani, Contract Manager (GB13)
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 E:mail address: david.kashani@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list 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, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Term	
6	Institute on Aging		7/1/18-6/30/20	
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: Citywide ADRC Coordinator			
10	Budget Reference Page No.(s)			Total
11	Program Term	7/1/18-6/30/19	7/1/19-6/30/20	7/1/18-6/30/20
12	Expenditures			
13	Salaries & Benefits	\$92,844	\$94,687	\$187,531
14	Operating Expenses	\$11,610	\$9,767	\$21,377
15	Subtotal	\$104,454	\$104,454	\$208,908
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$15,668	\$15,668	\$31,336
18	Capital/Subcontractor Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$120,122	\$120,122	\$240,244
20	HSA Revenues			
21				
22	General Fund (87%)	\$104,506	\$104,506	\$209,012
23	CFDA #93.778, ADRC(13%)	\$15,616	\$15,616	\$31,232
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$120,122	\$120,122	\$240,244
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$120,122	\$120,122	\$240,244
37	Full Time Equivalent (FTE)	1.05	1.05	
39	Prepared by: Josh Martin, Director of Community Programs Telephone No.: 415-750-8790			
40	HSA-CO Review Signature: _____			Date: 5.7.2018
41	HSA #1			10/25/2016

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	Institute on Aging							
4	Program: Citywide ADRC Coordinator							
5	(Same as Line 9 on HSA #1)							
6								
7	Salaries & Benefits Detail							
8								
9								
10						7/1/18-6/30/19	7/1/19-6/30/20	7/1/18-6/30/20
11		Agency Totals		HSA Program		DAAS	DAAS	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	<i>Citywide ADRC Coordinator</i>	\$70,000	1.00	100%	1.00	\$70,000	\$71,475	\$141,475
14	<i>Director of Community Programs</i>	\$85,500	1.00	5%	0.05	\$4,275	\$4,275	\$8,550
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS	\$155,500	2.00	105%	1.05	\$74,275	\$75,750	\$150,025
31								
32	FRINGE BENEFIT RATE	25%						
33	EMPLOYEE FRINGE BENEFITS	\$38,875				\$18,569	\$18,937	\$37,506
34								
35								
36	TOTAL SALARIES & BENEFITS	\$194,375				\$92,844	\$94,687	\$187,531
37	HSA #2	10/25/2016						

	A	B	C	D	E	F	G	H	I
1	Appendix B, Page 3								
2									
3	Institute on Aging								
4	Program Name: Citywide ADRC Coordinator								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11									
12	<u>Expenditure Category</u>				TERM	7/1/18-6/30/19	7/1/19-6/30/20	TOTAL	7/1/18-6/30/20
13	Rental of Property					\$ 3,200	\$ 3,264	\$	6,464
14	Utilities(Elec, Water, Gas, Phone, Garbage)					\$ 1,050	\$ 1,071	\$	2,121
15	Office Supplies, Postage					\$ 500	\$ 510	\$	1,010
16	Building Maintenance Supplies and Repair								
17	Printing and Reproduction								
18	Insurance					\$ 630	\$ 643	\$	1,273
19	Staff Training					\$ 600	\$ 600	\$	1,200
20	Staff Travel-(Local & Out of Town)					\$ 1,000	\$ 1,020	\$	2,020
21	Rental of Equipment								
22	Data Plan					\$ 480	\$ 490	\$	970
23	Licenses and Fees					\$ 900	\$ 920	\$	1,820
24	Outreach Support (events participation, flyers & signage)					\$ 1,000	\$ 1,000	\$	2,000
25	Technology/Equipment					\$ 2,250	\$ 250	\$	2,500
26	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
27									
28									
29									
30	OTHER								
31									
32									
33									
34									
35	TOTAL OPERATING EXPENSE					\$ 11,610	\$ 9,767	\$	21,377
36									
37	HSA #3								
	10/25/2016								

**APPENDIX A – SERVICES TO BE PROVIDED
MISSION NEIGHBORHOOD CENTERS
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2018 to June 30, 2020**

The grantee will provide information, assistance and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities and caregivers in the community.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability.
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client’s needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	Mission Neighborhood Centers.
HSA	San Francisco Human Services Agency.
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult	Person who is 60 years of age or older.
SF GetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.).
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in SF GetCare.

II. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Lesbian/Gay/Bisexual/Transgender

III. Location and Time of Services

The location for Mission Neighborhood Centers will be 362 Capp Street, San Francisco, CA 94110. Hours of Operation: Monday-Friday, 9am-5pm.

IV. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. ADRCs must provide a minimum of 0.8 FTE staffing.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC center on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

ADRC will provide:

- Client needs assessment;
- Information of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and

- shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation;
- Assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.; and
- Follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 0.8 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Outreach through presentations and events to spread awareness of both ADRC and DAAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- If applicable, based on the location of the ADRC, the ADRC staff will coordinate with the Citywide ADRC Coordinator and the local Housing Authority sites to introduce services to residents through presentations and/or fairs.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- Ensure that ADRC staff and clients have private space to meet that includes a computer to enter in data and research available resources.

V. Service Objectives

Each grantee will report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF GetCare.
- At least one training or outreach event per quarter to ensure community awareness of DAAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Mission Neighborhood Centers ADRC:

- Will serve **810** unduplicated older adults.
- Will serve **90** unduplicated adults with disabilities.
- Will provide **1,000** units of Information and Referral services.
- Will provide **850** service units of Assistance.
- Will provide **300** units of Follow-Up services.

VI. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report learning of the community resources and/or connection to services.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report they obtained the assistance requested in filling out an application for some type of financial benefit (e.g., Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc.) and will be able to submit the application for the program and/or obtain the financial assistance.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 10% of new clients utilizing the ADRC services will have heard about the ADRCs from an Outreach event.

VII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section V & VI- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
Department of Aging and Adult Services
2 Gough Street, 2nd floor
San Francisco, CA 94103
E:mail address: dana.leavitt@sfgov.org

Annyse Acevedo, Contract Manager (GB11)
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: Annyse.Acevedo@sfgov.org

VIII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list and whether services are provided appropriately according to Sections V and VI.
- 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, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			Term
6	Mission Neighborhood Centers			07/01/18 - 06/30/20
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: Aging & Disability Resource Center			
10	Budget Reference Page No.(s)			
11	Program Term	7/01/18-6/30/19	7/1/19-6/30/20	Total
12	Expenditures			
13	Salaries & Benefits	\$65,500	\$65,500	\$131,000
14	Operating Expense	\$4,229	\$4,229	\$8,458
15	Subtotal	\$69,729	\$69,729	\$139,458
16	Indirect Percentage (%)	15%	15%	\$0
17	Indirect Cost (Line 16 X Line 15)	\$10,460	\$10,460	\$20,920
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$80,189	\$80,189	\$160,378
20	HSA Revenues			
21	General Fund (87%)	\$69,764	\$69,764	\$139,528
22	CFDA 93.778 (13%) - ADRC	\$10,425	\$10,425	\$20,850
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$80,189	\$80,189	\$160,378
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$80,189	\$80,189	\$160,378
37	Full Time Equivalent (FTE)	1.00	1.00	
39	Prepared by:	Maria Bermudez	Telephone No.:	41! Date
40	HSA-CO Review Signature: _____			
41	HSA #1			4/26/2018

	A	B	C	D	E	F	G	H	I
1									
2									
3	Mission Neighborhood Centers								
4	Program Name: Aging & Disability Resource Center								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11									
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>07/01/18- 6/30/2019</u>		<u>07/01/19- 06/30/2020</u>		<u>TOTAL 7/1/18 - 6/30/20</u>
13	Rental of Property						\$400		\$400
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$265		\$300		\$565
15	Office Supplies, Postage				\$300		\$300		\$600
16	Building Maintenance Supplies and Repair				\$250		\$500		\$750
17	Printing and Reproduction				\$600		\$600		\$1,200
18	Insurance				\$600		\$600		\$1,200
19	Staff Training						\$179		\$179
20	Transportation				\$514		\$700		\$1,214
21	Staff Travel-(Local & Out of Town)								
22	Rental of Equipment								
23	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
24									
25									
26									
27									
28									
29	OTHER								
30	Fuel Maint & repairs						\$200		\$200
31	Advertising								
32	Equipment for new Program				\$1,500		\$250		\$1,750
33	Food Supplies				\$200		\$200		\$400
34	Janitorial Supplies								
35									
36	TOTAL OPERATING EXPENSE				\$4,229		\$4,229		\$8,458
37									
38	HSA #3								4/26/2018

APPENDIX A –SERVICES TO BE PROVIDED
NORTHERN CALIFORNIA PRESBYTERIAN HOMES & SERVICES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)

July 1, 2018 to June 30, 2020

The grantee will provide information, assistance and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities and caregivers in the community.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client’s needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.

Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	Northern California Presbyterian Homes & Services
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult	Person who is 60 years of age or older

SF GetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.)
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in SF GetCare.

II. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Lesbian/Gay/Bisexual/Transgender

III. Location and Time of Services

Services will be provided at both San Francisco Senior Center locations: 481 O'Farrell Street, San Francisco, CA 94102, and 890 Beach Street, San Francisco, CA 94109. Hours of operation are from 8:30am-5pm, Monday to Friday

IV. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. ADRCs must provide a minimum of 0.8 FTE staffing.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC center on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

ADRC will provide:

- Client needs assessment;
- Information of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation;
- Assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
- Follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 0.8 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Outreach through presentations and events to spread awareness of both ADRC and DAAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- If applicable, based on the location of the ADRC, the ADRC staff will coordinate with the Citywide ADRC Coordinator and the local Housing Authority sites to introduce services to residents through presentations and/or fairs.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- Ensure that ADRC staff and clients have private space to meet that includes a computer to enter in data and research available resources.

V. Service Objectives

ADRC Service Objectives

Each grantee will report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF GetCare.
- At least one training or outreach event per quarter to ensure community awareness of DAAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, NCPHS-San Francisco Senior Center ADRC:

- Will serve 1,800 unduplicated older adults.
- Will serve 200 unduplicated adults with disabilities.
- Will provide 3,000 units of Information and Referral services.
- Will provide 2,600 service units of Assistance.
- Will provide 800 units of Follow-Up services.

VI. ADRC Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report learning of the community resources and/or connection to services.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report they obtained the assistance requested in filling out an application for some type of financial benefit (e.g., Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc.) and will be able to submit the application for the program and/or obtain the financial assistance.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 10% of new clients utilizing the ADRC services will have heard about the ADRCs from an Outreach event.

VII. Reporting Requirements

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

- A. Grantee will provide a monthly report of activities, referencing the tasks as described in Section V & VI- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
Department of Aging and Adult Services
2 Gough Street, 2nd floor
San Francisco, CA 94103
Email address: Dana.leavitt@sfgov.org

Ella Lee, Contract Manager (GB18)
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: Ella.Lee@sfgov.org

VIII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list and whether services are provided appropriately according to Sections V and VI.

- 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.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name	Term		
Northern California Presbyterian Homes & Services (NCPHS)	7/1/2018 - 6/30/2020		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
If modification, Effective Date of Mod. No. of Mod.			
Program: Aging and Disability Resource Centers (ADRC)			
Budget Reference Page No.(s)			
Program Term	7/1/2018 - 6/30/2019	7/1/2019 - 6/30/2020	Total
Expenditures			
Salaries & Benefits	\$132,074	\$136,037	\$268,111
Operating Expenses	\$2,135	\$0	\$2,135
Subtotal	\$134,209	\$136,037	\$270,246
Indirect Percentage (%)	15%	14%	15%
Indirect Cost (Line 16 X Line 15)	\$20,131	\$19,004	\$39,135
Subcontractor/Capital Expenditures	\$701	\$0	\$701
TOTAL EXPENDITURES	\$155,041	\$155,041	\$310,082
HSA Revenues			
General Fund (87%)	\$134,886	\$134,886	\$269,772
CFDA #93.778 (13%) - ADRC	\$20,155	\$20,155	\$40,310
Total HSA Revenues	\$155,041	\$155,041	\$310,082
Other Revenues			
			\$0
			\$0
			\$0
			\$0
TOTAL OTHER REVENUES	\$0	\$0	\$0
TOTAL REVENUES	\$155,041	\$155,041	\$310,082
Full Time Equivalent (FTE)			
Prepared by: Tina Sha Telephone No.: 415-351-3648			
HSA-CO Review Signature: _____			
HSA #1			6/4/2018

Northern California Presbyterian Homes & Services (NCPHS)
 Program: Aging and Disability Resource Centers (ADRC)
 (Same as Line 9 on HSA #1)

Salaries & Benefits Detail

Position Title	Agency Totals		HSA Program		DAAS		
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	7/1/2018 - 6/30/2019 Budgeted Salary	7/1/2019 - 6/30/2020 Budgeted Salary	7/1/2018 - 6/30/2020 Total Budgeted Salary
<i>7/1/2018 - 6/30/2019</i>							
Information & Assistance Specialist-DT	\$46,593	1.00	100%	1.00	\$46,593		\$46,593
Information & Assistance Specialist-AP	\$46,593	1.00	100%	1.00	\$46,593		\$46,593
Director	\$92,937	1.00	5%	0.05	\$4,647		\$4,647
<i>7/1/2019 - 6/30/2020 (3% increase)</i>							
Information & Assistance Specialist-DT	\$47,991	1.00	100%	1.00		\$47,991	\$47,991
Information & Assistance Specialist-AP	\$47,991	1.00	100%	1.00		\$47,991	\$47,991
Director	\$95,725	1.00	5%	0.05		\$4,786	\$4,786
Totals	\$377,830	6.00	410%	4.10	\$97,833	\$100,768	\$198,601
Fringe Benefit Rate	35%						
Employee Fringe Benefit	\$132,240				\$34,241	\$35,269	\$69,510
TOTAL SALARIES & BENEFITS	\$510,070				\$132,074	\$136,037	\$268,111

HSA #2

6/4/2018

Northern California Presbyterian Homes & Services (NCPHS)

Program: Aging and Disability Resource Centers (ADRC)

(Same as Line 9 on HSA #1)

Operating Expense Detail

Expenditure Category	TERM	Total	
		7/1/2018 - 6/30/2019	7/1/2019 - 6/30/2020
Rental of Property			
Utilities(Elec, Water, Gas, Phone, Garbage)			
Office Supplies, Postage	\$ 700		\$ 700
Building Maintenance Supplies and Repair	\$ 1,435		\$ 1,435
Printing and Reproduction			
Insurance			
Staff Training			
Staff Travel-(Local & Out of Town)			
Rental of Equipment			
<u>Consultants</u>			
<u>Other</u>			
TOTAL OPERATING EXPENSE	\$ 2,135	\$ -	\$ 2,135

HSA #3

6/4/2018

Northern California Presbyterian Homes & Services (NCPHS)

Program: Aging and Disability Resource Centers (ADRC)

(Same as Line 9 on HSA #1)

Subcontractor/Capital Expenditures

Subcontractors	Term	7/1/2018 - 6/30/2019		7/1/2019 - 6/30/2020		Total
						7/1/2018 - 6/30/2020
Total Subcontractor Cost		\$0	\$0	\$0	\$0	\$0

Equipment	Units	Item/Description	Term	7/1/2018 - 6/30/2019		7/1/2019 - 6/30/2020		Total
								7/1/2018 - 6/30/2020
		Equipment-Computer		\$701				\$701
Total Equipment Cost				\$701	\$0	\$0	\$0	\$701

Remodeling	Description	Term	7/1/2018 - 6/30/2019		7/1/2019 - 6/30/2020		Total
							7/1/2018 - 6/30/2020
Total Remodeling Cost							
TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE				\$701	\$0	\$0	\$701

HSA #4

6/4/2018

**APPENDIX A – SERVICES TO BE PROVIDED
ON LOK DAY SERVICES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2018 to June 30, 2020**

The grantee will provide information, assistance and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities and caregivers in the community.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	On Lok Day Services

HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult	Person who is 60 years of age or older
SF GetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.)
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in SF GetCare.

II. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Lesbian/Gay/Bisexual/Transgender

III. Location and Time of Services

Services will be provided at 30th Street Senior Center: at 225 30th Street, San Francisco, CA 94131. Hours of operation are from 8:30am-5pm, Monday to Friday.

IV. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. ADRCs must provide a minimum of 0.8 FTE staffing.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC center on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

ADRC will provide:

- Client needs assessment;
- Information of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation;
- Assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
- Follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 0.8 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Outreach through presentations and events to spread awareness of both ADRC and DAAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- If applicable, based on the location of the ADRC, the ADRC staff will coordinate with the Citywide ADRC Coordinator and the local Housing Authority sites to introduce services to residents through presentations and/or fairs.

- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- Ensure that ADRC staff and clients have private space to meet that includes a computer to enter in data and research available resources.

V. Service Objectives

Each grantee will report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF.GetCare.
- At least one training or outreach event per quarter to ensure community awareness of DAAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, On Lok Day Services ADRC:

- Will serve 1,360 unduplicated older adults.
- Will serve 240 unduplicated adults with disabilities.
- Will provide 2,190 units of Information and Referral services.
- Will provide 2,130 service units of Assistance.
- Will provide 1380 units of Follow-Up services.

VI. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report learning of the community resources and/or connection to services.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report they obtained the assistance requested in filling out an application for some type of financial benefit (e.g., Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc.) and will be able to submit the application for the program and/or obtain the financial assistance.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 10% of new clients utilizing the ADRC services will have heard about the ADRCs from an Outreach event.

VII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section V & VI- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.

- B. Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
 Department of Aging and Adult Services
 2 Gough Street, 2nd floor
 San Francisco, CA 94103
 E:mail address: dana.leavitt@sfgov.org

Steve Kim, Contract Manager (GB15)
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: steve.kim@sfgov.org

VIII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list and whether services are provided appropriately according to Sections V and VI.
- 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	E
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			Term
6	On Lok Day Services			7/1/18 - 6/30/20
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: Aging and Disability Resource Centers (ADRC)			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	7/1/19-6/30/20	Total
12	Expenditures			
13	Salaries & Benefits	\$89,829	\$89,829	\$179,658
14	Operating Expense	\$5,322	\$5,322	\$10,644
15	Subtotal	\$95,151	\$95,151	\$190,302
16	Indirect Percentage (%)	9%	9%	\$0
17	Indirect Cost (Line 16 X Line 15)	\$8,563	\$8,563	\$17,126
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$103,714	\$103,714	\$207,428
20	HSA Revenues			
21	General Fund (87%)	\$90,232	\$90,232	\$180,464
22	CFDA 93.778 (13%) - ADRC	\$13,482	\$13,482	\$26,964
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$103,714	\$103,714	\$207,428
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$103,714	\$103,714	\$207,428
37	Full Time Equivalent (FTE)	1.58	1.58	
39	Prepared by: Valorie Villela		Telephone No.: (415) 550-2211	
40	HSA-CO Review Signature: _____			
41	HSA #1			6/20/2018

	A	B	C	D	E	F	G	H	K
1									
2									
3	On Lok Day Services								
4	Program: Aging and Disability Resource Centers (ADRC)								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11									
12	<u>Expenditure Category</u>				<u>TERM</u>	<u>7/1/18-6/30/19</u>	<u>7/1/19-6/30/20</u>		<u>TOTAL</u> <u>7/1/18 to 6/30/20</u>
13	Rental of Property								
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$	1,237	\$ 1,237	\$	2,474
15	Office Supplies, Postage				\$	1,511	\$ 1,511	\$	3,022
16	Building Maintenance Supplies and Repair				\$	1,088	\$ 1,088	\$	2,176
17	Printing and Reproduction								
18	Insurance				\$	1,159	\$ 1,159	\$	2,318
19	Staff Training								
20	Staff Travel-(Local & Out of Town)								
21	Rental of Equipment				\$	169	\$ 169	\$	338
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23									
24									
25									
26									
27									
28	OTHER								
29	Payroll Processing				\$	158	\$ 158	\$	316
30									
31									
32									
33									
34									
35	TOTAL OPERATING EXPENSE				\$	5,322	\$ 5,322	\$	10,644
36									
37	HSA #3								6/20/2018

**APPENDIX A – SERVICES TO BE PROVIDED
OPENHOUSE
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2018 to June 30, 2020**

The grantee will provide information, assistance and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities and caregivers in the community.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	Openhouse

HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult	Person who is 60 years of age or older
SF GetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.)
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in SF GetCare.

II. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Lesbian/Gay/Bisexual/Transgender

III. Location and Time of Services

The services for Openhouse will be provided at 65 Laguna Street, San Francisco, CA 94114. Hours of operation are from 8:30am-5pm, Monday to Friday.

IV. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. ADRCs must provide a minimum of 0.8 FTE staffing.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC center on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

ADRC will provide:

- Client needs assessment;
- Information of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation;
- Assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
- Follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 0.8 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Outreach through presentations and events to spread awareness of both ADRC and DAAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- If applicable, based on the location of the ADRC, the ADRC staff will coordinate with the Citywide ADRC Coordinator and the local Housing Authority sites to introduce services to residents through presentations and/or fairs.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.

- Ensure that ADRC staff and clients have private space to meet that includes a computer to enter in data and research available resources.

V. Service Objectives

Each grantee will report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF.GetCare.
- At least one training or outreach event per quarter to ensure community awareness of DAAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Openhouse ADRC:

- Will serve 1,080 unduplicated older adults.
- Will serve 120 unduplicated adults with disabilities.
- Will provide 1,500 units of Information and Referral services.
- Will provide 1,300 service units of Assistance.
- Will provide 400 units of Follow-Up services.

VI. ADRC Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report learning of the community resources and/or connection to services.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report they obtained the assistance requested in filling out an application for some type of financial benefit (e.g., Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc.) and will be able to submit the application for the program and/or obtain the financial assistance.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 10% of new clients utilizing the ADRC services will have heard about the ADRCs from an Outreach event.

VII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section V & VI- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.

- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
 Department of Aging and Adult Services
 2 Gough Street, 2nd floor
 San Francisco, CA 94103
 E:mail address: dana.leavitt@sfgov.org

Steve Kim, Contract Manager (GB15)
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: steve.kim@sfgov.org

VIII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list and whether services are provided appropriately according to Sections V and VI.
- 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, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			7/1/18 - 6/30/20
6	Openhouse			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/> Re-Allocation <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: ADRC			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18 - 6/30/19	7/1/19 - 6/30/20	Total
12	Expenditures			
13	Salaries & Benefits	\$64,827	\$64,827	\$129,654
14	Operating Expense	\$434	\$434	\$868
15	Subtotal	\$65,261	\$65,261	\$130,522
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$9,790	\$9,790	\$19,580
18	Capital Expenditure	\$0	\$0	\$0
19	Total Expenditures	\$75,051	\$75,051	\$150,102
20	HSA Revenues			
21	General Fund (87%)	\$65,294	\$65,294	\$130,588
22	CFDA 93.778 (13%) - ADRC	\$9,757	\$9,757	\$19,514
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$75,051	\$75,051	\$150,102
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$75,051	\$75,051	\$150,102
37	Full Time Equivalent (FTE)	1.13	1.13	
39	Prepared by: Matthew Cimino	Telephone No.: (415) 530-2783		
40	HSA-CO Review Signature:	_____		
41	HSA #1	6/20/2018		

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	Openhouse									
4	Program Name: ADRC									
5										
6										
7	Operating Expense Detail									
8										
9										
10										
11										
12	<u>Expenditure Category</u>									TOTAL
										7/1/18 - 6/30/20
13	Rental of Property									
14	Utilities(Elec, Water, Gas, Phone, Scavenger)									
15	Office Supplies, Postage									
16	Building Maintenance Supplies and Repair									
17	Printing and Reproduction				\$ 434		\$ 434			\$ 868
18	Insurance									
19	Staff Training									
20	Staff Travel-(Local & Out of Town)									
21	Rental of Equipment									
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE									
23										
24										
25										
26										
27										
28	OTHER									
29										
30										
31										
32										
33										
34										
35	TOTAL OPERATING EXPENSE				\$ 434		\$ 434			\$ 868
36										
37	HSA #3									6/20/2018

**APPENDIX A –SERVICES TO BE PROVIDED
SELF-HELP FOR THE ELDERLY
AGING AND DISABILITIES RESOURCE CENTER (ADRC)**

July 1, 2018 to June 30, 2020

The grantee will provide information, assistance and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities and caregivers in the community.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	Self-Help for the Elderly

HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult	Person who is 60 years of age or older
SF GetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.)
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in SF GetCare.

II. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Lesbian/Gay/Bisexual/Transgender

III. Location and Time of Services

The services for Self-Help for the Elderly will be provided at 4 locations: 601 Jackson Street basement, San Francisco, CA 94133, 777 Stockton Street, San Francisco CA 94108, 131 Lenox Way, San Francisco, CA 94127 and 2601 40th Avenue, San Francisco, CA 94116. Hours of operation are from 8:30am-5pm, Monday to Friday.

IV. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. ADRCs must provide a minimum of 0.8 FTE staffing.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC center on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

ADRC will provide:

- Client needs assessment;
- Information of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation;
- Assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
- Follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 0.8 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Outreach through presentations and events to spread awareness of both ADRC and DAAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- If applicable, based on the location of the ADRC, the ADRC staff will coordinate with the Citywide ADRC Coordinator and the local Housing Authority sites to introduce services to residents through presentations and/or fairs.

- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- Ensure that ADRC staff and clients have private space to meet that includes a computer to enter in data and research available resources.

V. Service Objectives

Each grantee will report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF.GetCare.
- At least one training or outreach event per quarter to ensure community awareness of DAAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Self-help for the Elderly ADRC:

- Will serve 4,770 unduplicated older adults.
- Will serve 450 unduplicated adults with disabilities.
- Will provide 5,300 units of Information and Referral services.
- Will provide 9,000 service units of Assistance.
- Will provide 1,600 units of Follow-Up services.

VI. ADRC Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report learning of the community resources and/or connection to services.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report they obtained the assistance requested in filling out an application for some type of financial benefit (e.g., Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc.) and will be able to submit the application for the program and/or obtain the financial assistance.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 10% of new clients utilizing the ADRC services will have heard about the ADRCs from an Outreach event.

VII. Reporting Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section V & VI- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.

- B. Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
 Department of Aging and Adult Services
 2 Gough Street, 2nd floor
 San Francisco, CA 94103
 E:mail address: dana.leavitt@sfgov.org

Tahir Shaikh, Contract Manager (GB21)
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: tahir.shaikh@sfgov.org

VIII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list and whether services are provided appropriately according to Sections V and VI.
- 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, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name: SELF-HELP FOR THE ELDERLY		Term	
6			7/1/18-6/30/20	
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: ADRC (I&A)			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	7/1/19-6/30/20	Total
12	Expenditures			
13	Salaries & Benefits	\$247,519	\$247,519	\$495,038
14	Operating Expenses	\$13,543	\$13,543	\$27,086
15	Subtotal	\$261,062	\$261,062	\$522,124
16	Indirect Percentage (%)	13%	13%	13%
17	Indirect Cost (Line 16 X Line 15)	\$33,938	\$33,938	\$67,876
18	Capital/Subcontractor Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$295,000	\$295,000	\$590,000
20	HSA Revenues			
21	General Fund (87%)	\$256,650	\$256,650	\$513,300
22	CFDA 93.778 (13%)-ADRC	\$38,350	\$38,350	\$76,700
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$295,000	\$295,000	\$590,000
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$295,000	\$295,000	\$590,000
37	Full Time Equivalent (FTE)	4.65	4.65	
39	Prepared by: Leny Nair	Telephone No.: (415) 677-7682		Date: 5/31/18
40	HSA-CO Review Signature: _____			
41	HSA #1			10/25/2016

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3	Name: SELF-HELP FOR THE ELDERLY									
4	Program: ADRC (I&A)									
5	(Same as Line 9 on HSA #1)									
6										
7	Operating Expense Detail									
8										
9										
10										
11	TOTAL									
12	<u>Expenditure Category</u>			TERM	<u>7/1/18-6/30/19</u>		<u>7/1/19-6/30/20</u>			<u>7/1/18-6/30/20</u>
13	Rental of Property				\$ 8,400		\$ 8,400			\$ 16,800
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$ 2,500		\$ 2,500			\$ 5,000
15	Office Supplies, Postage				\$ 150		\$ 150			\$ 300
16	Building Maintenance Supplies and Repair				\$ 150		\$ 150			\$ 300
17	Printing and Reproduction				\$ 100		\$ 100			\$ 200
18	Insurance				\$ 1,232		\$ 1,232			\$ 2,464
19	Staff Training				\$ 100		\$ 100			\$ 200
20	Staff Travel-(Local & Out of Town)				\$ 611		\$ 611			\$ 1,222
21	Rental of Equipment									
22										
23	CONSULTANTS									
24										
25										
26										
27	OTHER									
28	Recruitment Expense				\$ 300		\$ 300			\$ 600
29										
30										
31	TOTAL OPERATING EXPENSE				\$ 13,543		\$ 13,543			\$ 27,086
32										
33	HSA #3									10/25/2016

**APPENDIX A–SERVICES TO BE PROVIDED
 TOOLWORKS, INC.
 AGING AND DISABILITIES RESOURCE CENTER (ADRC)
 July 1, 2018 to June 30, 2020**

The grantee will provide information, assistance and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities and caregivers in the community.

I. Definitions

ADRC	Aging and Disability Resource Centers (ADRC) provide a broad spectrum of information including options for long-term services and supports (LTSS) and referrals between a wide array of organizations. ADRCs are located throughout San Francisco and serve people of all ages, disabilities, and income levels.
Adult with Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client’s needs will be met.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation
Citywide ADRC Coordinator	The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff.
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.

Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
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	Toolworks, Inc.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, Lesbian, Gay, Bisexual, Transgender (LGBT) programs/services and transportation.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
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.
Senior/Older Adult	Person who is 60 years of age or older
SF GetCare (ir2.sfgetcare.com)	A web-based application that provides specific functionalities for contracted agencies to use to perform client

	intake/assessment/enrollment, record service objectives, run reports, etc.
SOGI Data Collection	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.)
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in SF GetCare.

II. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Lesbian/Gay/Bisexual/Transgender

III. Location and Time of Service

Services will take place at Toolworks, Inc., 25 Kearny Street, #400, San Francisco, CA, 94108. Hours of operation are from 8:30am-5pm, Monday to Friday.

IV. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. ADRCs must provide a minimum of 0.8 FTE staffing.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC center on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be

required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

ADRC will provide:

- Client needs assessment;
- Information of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation;
- Assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
- Follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 0.8 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Outreach through presentations and events to spread awareness of both ADRC and DAAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- If applicable, based on the location of the ADRC, the ADRC staff will coordinate with the Citywide ADRC Coordinator and the local Housing Authority sites to introduce services to residents through presentations and/or fairs.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- Ensure that ADRC staff and clients have private space to meet that includes a computer to enter in data and research available resources.

V. Service Objectives

Each grantee will report on the following service objectives on a quarterly basis:

- Ensure that at least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SF GetCare.
- At least one training or outreach event per quarter to ensure community awareness of DAAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Toolworks, Inc. ADRC:

- Will serve 360 unduplicated older adults.
- Will serve 840 unduplicated adults with disabilities.
- Will provide 1,160 units of Information and Referral services.
- Will provide 1,100 service units of Assistance.
- Will provide 360 units of Follow-Up services.

VI. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified.

- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report learning of the community resources and/or connection to services.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 25% of unduplicated clients, at least 85% of the surveyed clients will report they obtained the assistance requested in filling out an application for some type of financial benefit (e.g., Renter's/Home Owner Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D, etc.) and will be able to submit the application for the program and/or obtain the financial assistance.
- Based on monthly client surveys, created by DAAS, and with a sample size of at least 10% of new clients utilizing the ADRC services will have heard about the ADRCs from an Outreach event.

VII. Reporting Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section V & VI- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.
- Grantee shall input all required data into SF GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- Grantee shall develop and deliver ad hoc reports as requested by DAAS/HSA.
- Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.

- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Dana Leavitt, Integrated Intake Supervisor
Department of Aging and Adult Services
2 Gough Street, 2nd floor
San Francisco, CA 94103
Email address: dana.leavitt@sfgov.org

David Kashani, Contract Manager (GB13)
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: david.kashani@sfgov.org

VIII. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, 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; a board of director list and whether services are provided appropriately according to Sections V and VI.
- 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, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Term	
6	Toolworks		7/1/18-6/30/20	
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: ADRC			
10	Budget Reference Page No.(s)			
11	Program Term	7/1/18-6/30/19	7/1/19-6/30/20	Total
12	Expenditures			
13	Salaries & Benefits	\$55,853	\$55,853	\$111,706
14	Operating Expenses	\$0	\$0	\$0
15	Subtotal	\$55,853	\$55,853	\$111,706
16	Indirect Percentage (%)	0%	0%	0.00%
17	Indirect Cost (Line 16 X Line 15)	\$0	\$0	\$0
18	Capital/Subcontractor Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$55,853	\$55,853	\$111,706
20	HSA Revenues			
21				
22	General Fund (87%)	\$48,592	\$48,592	\$97,184
23	CFDA #93.778, ADRC(13%)	\$7,261	\$7,261	\$14,522
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$55,853	\$55,853	\$111,706
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$55,853	\$55,853	\$111,706
37	Full Time Equivalent (FTE)	1.16	1.16	
39	Prepared by: Kristy Feck	Telephone No.:	415-733-0990	Date: 05/31/2018
40	HSA-CO Review Signature: _____			
41	HSA #1			10/25/2016

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	Toolworks							
4	Program: ADRC							
5	(Same as Line 9 on HSA #1)							
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11						7/1/18-6/30/19	7/1/19-6/30/20	7/1/18-6/30/20
		Agency Totals		HSA Program		DAAS	DAAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	I&A Specialist	\$37,510	1.00	100%	1.00	\$37,510	\$37,510	\$75,020
14	Asst Dir, Community Living	\$57,630	1.00	16%	0.16	\$9,365	\$9,365	\$18,730
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS	\$95,140	2.00	116%	1.16	\$46,875	\$46,875	\$93,750
31								
32	FRINGE BENEFIT RATE	19%						
33	EMPLOYEE FRINGE BENEFITS	\$18,077				\$8,978	\$8,978	\$17,956
34								
35								
36	TOTAL SALARIES & BENEFITS	\$113,217				\$55,853	\$55,853	\$111,706
37	HSA #2	10/25/2016						