



London Breed, Mayor

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

Trent Rhorer, Executive Director

MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
 JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *291*

DATE: FEBRUARY 15, 2019

SUBJECT: NEW GRANTS: **VARIOUS AGENCIES (NON-PROFIT) TO PROVIDE INTERGENERATIONAL PROGRAMS FOR OLDER ADULTS AND /OR ADULTS WITH DISABILITES**

GRANT TERM: 1/1/19 – 6/30/21

GRANT AMOUNT:

	New	Contingency	Total
	\$1,587,175	\$158,717	\$1,745,892

ANNUAL AMOUNT:

	FY 18-19	FY 19-20	FY 20-21
	\$333,547	\$626,814	\$626,814

FUNDING:

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
	\$1,587,175			\$158,717	\$1,745,892

PERCENTAGE:

	100%			100%
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The Department of Aging and Adult Services (DAAS) requests authorization to enter into new grant agreements with the proposed grantees listed below for the period of January 1, 2019 to June 30, 2021, in the amount of \$1,587,175 plus a 10% contingency for a total amount not to exceed \$1,745,892. The purpose of the grant is to provide intergenerational programming for older adults and/or adults with disabilities living in the City and County of San Francisco.

Grantee	Annual Amount	FY 18-21	Contingency	Not to Exceed
Bayview Hunters Point Multipurpose Senior Services	\$93,742	\$230,435	\$23,043	\$253,478
Kimochi	\$101,244	\$267,110	\$26,711	\$293,821
LightHouse	\$29,390	\$73,475	\$7,348	\$80,823
Mission Neighborhood Center	\$42,021	\$135,732	\$13,573	\$149,305

NCPHS	\$150,000	\$375,000	\$37,500	\$412,500
Openhouse	\$210,417	\$505,423	\$50,542	\$555,965
Total	\$626,814	\$1,587,175	\$158,717	\$1,745,892

Background

City and County of San Francisco voters passed Proposition I on November 8, 2016. Proposition I established the Dignity Fund (Fund). The Dignity Fund is a guaranteed funding stream for programs and services that provide support for older adults and adults with disabilities. The Department of Aging and Adult Services (DAAS) administers the Dignity Fund.

There is an Oversight and Advisory Committee (OAC) for the Fund. DAAS and the OAC are responsible for a fair and equitable allocation of the Fund. The administration of the Fund includes a planning process that began in FY 17/18 and repeats every fourth fiscal year. The planning process starts with a Community Needs Assessment (DFCNA). The findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The Board of Supervisors approved the FY 17/18 DFCNA report in June of 2018.

The City Charter Amendment for the Fund requires the City to make an annual baseline contribution to the Fund and to increase the baseline contribution to the Fund in FY 17/18 through FY 26/27. In FY 18/19 the City added \$3 million dollars to its annual baseline contribution. Using the DFCNA as a guide and in consultation with the OAC, DAAS developed a FY 18/19 allocation plan for the expenditure of the additional \$3 million dollars and it included intergenerational programming.

The DFCNA highlighted the need to continue providing programming that creates opportunities for older adults and adults with disabilities to socialize, build community, and make valued contributions to their communities and the DFCNA revealed a demand for intergenerational programming to be a vehicle to expand these opportunities. In addition, the DFCNA identified social isolation as an equity factor. Intergenerational programs that foster intentional interaction and aim to build relationships like the programs presented below are also in alignment with a key priority for DAAS, which is to address equity factors in service delivery.

Services to be Provided

The grantees will provide intergenerational programming for older adults and adults with disabilities living in the City and County of San Francisco. The intergenerational programming will bring together a minimum of two different generations and at least one of the participating generations will be inclusive of the target population. The intergenerational programming offered by the grantees will consist of activities that are face to face, organized, and scheduled ongoing and consistently. The activities will support joint engagement and encourage relationship building between the participating generations that is mutually beneficial.

Please refer to attached Appendices A, B, and F for each Grantee for more detailed information regarding service objectives, outcome objectives, and budget.

Performance

These are new grants for each of the grantees and DAAS. There is no monitoring history specific for this program to report at this time. Each grantee is a current DAAS contractor and in compliance with performance and monitoring requirements for fiscal year 17/18 for other DAAS grants.

Selection

Grantees were selected through Request for Proposal #806, which was competitively bid in August 20, 2018.

Funding

Funding for these grants is provided by County General Funds.

ATTACHMENTS

Appendix A – Services to be Provided – Bayview Hunters Point Multipurpose Senior Services

Appendix B – Budget Summary – Bayview Hunters Point Multipurpose Senior Services

Appendix A – Services to be Provided – Kimochi

Appendix B – Budget Summary – Kimochi

Appendix A – Services to be Provided – Lighthouse

Appendix B – Budget Summary – Lighthouse

Appendix A – Services to be Provided – Mission Neighborhood Center

Appendix B – Budget Summary – Mission Neighborhood Center

Appendix A – Services to be Provided – NCPHS

Appendix B – Budget Summary – NCPHS

Appendix A – Services to be Provided – Openhouse

Appendix B – Budget Summary – Openhouse

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE
BAYVIEW HUNTERS POINT MULTIPURPOSE SENIOR SERVICES

DIGNITY FUND

INTERGENERATIONAL PROGRAM

January 1, 2019 – June 30, 2021

I. Purpose of Grant

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with another generation through regularly planned activities and joint engagement with a goal of fostering relationships that are mutually beneficial.

II. Definitions

Adult with a Disability	A person who is 18 to 59 years of age living with a disability
CA.GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	Persons who identify with a race or ethnicity other than non-Hispanic White
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Dignity Fund (Fund)	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities.
Dignity Fund Community Needs Assessment (DFCNA)	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The first DFCNA was completed in fiscal year 17-18
Disability	A condition attributable to mental, cognitive or physical

	impairment, or a combination of mental, cognitive 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: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Fund	Dignity Fund
Generation	Individuals born and living at about the same time, regarded collectively.
Grantee	Bayview Hunters Point Multipurpose Senior Services
Intergenerational Program/Programming	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBT/LGBTQ	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OAC	Dignity Fund Oversight and Advisory Committee
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years of age or older; used interchangeably with the term "Senior"
Senior	Person who is 60 years of age or older; used interchangeably with the "Older Adult"
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Three Item UCLA Loneliness Scale	A scale that comprises three questions and measure three dimensions of loneliness. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/

Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the Intergenerational Program provided by the Grantee and reflected in CA.GetCare through program enrollment.
Unit of Service	One hour of Intergenerational Programming

III. Target Population

This grant will serve older adults and/or adults with disabilities living in the City and County of San Francisco. Additional target priorities include members of a population with one or more of the following equity factors identified in the DFCNA.

- Social Isolation
- Low Income
- Limited or No English Speaking Proficiency
- Communities of Color
- Sexual Orientation and Gender Identity

IV. Eligibility for Program Enrollment

1. A resident of San Francisco, and
2. A person who is an older adult or an adult with a disability

V. Description of Services

1. Grantee will provide intergenerational programming that brings together a minimum of two different generations and at least one of the participating generations must be inclusive of the target population and eligible for program enrollment.
2. Grantee will delineate each participating generation including the birth year the generation begins and the birth year the generation ends. (e.g., Millennials are born in 1980 to 2000, Generation X are born in 1961 to 1981). While there is not strictly defined birth years among experts for any generation, the oldest and youngest person within a generation for this grant agreement must be within twenty (20) years of age. The grantee must document its delineation for each of the participating generations.
3. Grantee will promote its intergenerational program to the eligible participants through targeted outreach.
4. Grantee will promote programming in the community; this can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, in newsletters/publications and social media when appropriate, and on the grantee's website(s).
5. Grantee will conduct outreach to individuals belonging to generations other than the target population to ensure that its intergenerational program brings together a minimum of two generations.

6. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved.
7. The intergenerational programming offered by the grantee will support relationship building between the participating generations.
8. The intergenerational programming offered by the grantee will create reciprocity between the participating generations.
9. The intergenerational programming offered by the grantee will consist of activities and interactions that are face to face.
10. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all consumers enrolled in the intergenerational program and track consumers' scores as needed to report annual outcome objectives.
11. Grantee shall ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
12. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
13. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAAS-OOA policy memoranda manual.
14. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable.

VI. Location and Time of Services

The details of the sites and operational hours are as attached in the Site Chart, (Appendix F).

VII. Service Objectives

On an annual basis, Grantee will meet the following service objectives:

1. Grantee will enroll at least the number of unduplicated consumers and provide the units of service detailed in Table A below.

TABLE A				
Service Objective Summary Table	*FY 2018-2019	FY 2019-2020	FY 2020-2021	Total – 3 years
Number of Unduplicated Consumers	50	150	150	350
Number of Intergenerational Programming Hours	228	602	602	1432
*Year One, FY 2018-2019, is 6 months only				

VIII. Outcome Objectives

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

1. At least 65% of the surveyed consumers will report that participating in the intergenerational program has helped them to develop new relationships or friendships.*
2. At least 60% of the surveyed consumers will report that participating in the intergenerational program has helped them to feel that they are valued community members by providing opportunities to communicate knowledge, utilize skills, share stories, etc.*
3. At least 50% of the consumers who screen as “lonely” using the Three Question UCLA Loneliness Scale will report a reduction in loneliness as evidence by a decrease in their loneliness score when comparing at least two questionnaires taken in a fiscal year.

**Based on a survey created by the grantee with input from DAAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAAS provided or DAAS approved intake form into the CA.GetCare database in accordance to DAAS policy.
3. Grantee will enter into the Ca.GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
 - Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAAS by March 15 each grant year or a mutually agreed upon date between DAAS and the Grantee.
8. Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by SF-HSA. The due date for submitting the annual summary report is no later than July 10 each grant year.

9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAAS.

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

tahir.shaikh@sfgov.org
Contract Manager, Office of Contract Management
Or
tiffany.kearney@sfgov.org
Dignity Fund Program Analyst
Department of Aging and Adult Services

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on CA.GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the elder abuse reporting, evidence that program staff have completed security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
2. 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.

Date: 9/16/18		SITE CHART - Intergenerational Program		FY: 1/1/2019-6/30/2019	
AGENCY: Bayview Hunters Point Multipurpose Senior Services		Appendix F			
CONTRACT MAILING ADDRESS: 1753 Carroll St., San Francisco, CA 94124		Agency's web site: https://bhpmss.org/			
DIRECTOR: Cathy Davis, MSW, Executive Director		PHONE NO.: 415-822-1444			
Program:					
Community Service Program Pilot					
Total Annual # of UDC = 50	UDC/Site = 50				
SITES: Name of Site	Dr. George Davis Senior Center				
Address and Zip	1753 Carroll St. San Francisco, CA 94124				
Phone Number	415-822-1444				
Fax Number	415-822-5327				
Neighborhood	Bayview Hunters Point				
Supervisory District No.	10				
Person in Charge:	Linda Mack-Burch, Director				
Site Manager/Coordinator	TBD				
Additional Programs Offered at Site	Always Active, Arts & Crafts, Brown Bag, Computer Classes, Health Education, Food Giveaways, Exercise, Choir, Music Events, Trips, Special Events, ADRC site, Cong Meals				
Days Open	X Mon X Tues X Wed X Thurs X Fri X Sat Sun				
Hours Open	9:00a.m. - 5:00p.m., M-W-F 9:00a.m. - 5:00p.m., M-F 5:00p.m. - 8:00 p.m., T, W, Th 10:00a.m. - 11:00a.m. Sat				
Total number of Service Days	150				
DAAS Funded Meal Service (Yes/No)	Yes				
Number of Service Days Closed	10				
ADA Accessible	X Yes No				

	A	B	C	D	E
1					Appendix B, Page 1
2					Document Date: 9/16/2018
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name			Term 1/1/19 - 6/30/21	
6	Bayview Senior Services				
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: Intergenerational Programs				
10	Budget Reference Page No.(s)				Total
11	Program Term	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/2019-6/30/2021
12	Expenditures				
13	Salaries & Benefits	\$31,949	\$63,898	\$63,898	\$159,745
14	Operating Expense	\$6,400	\$19,800	\$19,800	\$46,000
15	Subtotal	\$38,349	\$83,698	\$83,698	\$205,745
16	Indirect Percentage (12%)	12%	12%	12%	12%
17	Indirect Cost (Line 16 X Line 15)	\$4,602	\$10,044	\$10,044	\$24,690
18	Capital Expenditure	\$0	\$0	\$0	\$0
19	Total Expenditures	\$42,951	\$93,742	\$93,742	\$230,435
20	HSA Revenues				
21	General Fund	\$42,951	\$93,742	\$93,742	\$230,435
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$42,951	\$93,742	\$93,742	\$230,435
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$42,951	\$93,742	\$93,742	\$230,435
37	Full Time Equivalent (FTE)	1	1	1	
39	Prepared by:	Telephone No.:		Date	
40	HSA-CO Review Signature: _____				
41	HSA #1				11/15/2007

	A	B	C	D	E	F	G	H	I
1							Appendix B, Page 2		
2							Document Date: 9/16/2018		
3									
4	Program Name: Intergenerational								
5	(Same as Line 9 on HSA #1)								
6									
7	Salaries & Benefits Detail								
8									
9									
10									
11		1/1/19-6/30/19		7/1/19-6/30/20		7/1/20-6/30/21		1/1/2019-6/30/2021	
		Agency Totals		For HSA Program		For DHS Program	For DHS Program	For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	
13	Intergenerational Program Coord	\$49,920	100%	100%	100%	\$24,960	\$49,920	\$49,920	\$124,800
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30	TOTALS	\$49,920	1.00	1.00	1.00	\$24,960	\$49,920	\$49,920	\$124,800
31									
32	FRINGE BENEFIT RATE	28%							
33	EMPLOYEE FRINGE BENEFITS	\$13,977				\$6,989	\$13,978	\$13,978	\$34,945
34									
35									
36	TOTAL SALARIES & BENEFITS	\$63,897				\$31,949	\$63,898	\$63,898	\$159,745
37	HSA #2								11/15/2007

	A	B	C	D	E	F	G	H	I	J	K
1											
2											Appendix B, Page 3
3											Document Date: 9/16/2018
4	Program Name: Intergeneraional										
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>1/1/19-6/30/19</u>	<u>7/1/19-6/30/20</u>	<u>7/1/20-6/30/21</u>			<u>1/1/2019-6/30/2021</u>
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										
18	Insurance										
19	Staff Training										
20	Staff Travel-(Local & Out of Town)										
21	Rental of Equipment										
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE										
	Stipends for facilitators: \$100 each upto 6 per month x 5 months in FY 18/19; and 12 months in FY 19/20 & 20/21										
23						\$3,000	\$7,200	\$7,200			\$17,400
24											
25											
26											
27											
28	OTHER										
29	Program Supplies - \$250/mo (~4 mo & 12 mo)					\$1,000	\$3,000	\$3,000			\$7,000
30	Transportation Cost - \$800/mo (~3 mo & 12 mo)					\$2,400	\$9,600	\$9,600			\$21,600
31											
32											
33											
34											
35	TOTAL OPERATING EXPENSE					\$6,400	\$19,800	\$19,800			\$46,000
36											
37	HSA #3										11/15/2007

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

KIMOCHI INC.

DIGNITY FUND

INTERGENERATIONAL PROGRAM

January 1, 2019 – June 30, 2021

I. Purpose of Grant

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with another generation through regularly planned activities and joint engagement with a goal of fostering relationships that are mutually beneficial.

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	impairment, or a combination of mental, cognitive 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: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
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Grantee	Kimochi Inc.
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III. Target Population

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- Social Isolation
- Low Income
- Limited or No English Speaking Proficiency
- Communities of Color
- Sexual Orientation and Gender Identity

IV. Eligibility for Program Enrollment

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7. The intergenerational programming offered by the grantee will support relationship building between the participating generations.
8. The intergenerational programming offered by the grantee will create reciprocity between the participating generations.
9. The intergenerational programming offered by the grantee will consist of activities and interactions that are face to face.
10. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all consumers enrolled in the intergenerational program and track consumers' scores as needed to report annual outcome objectives.
11. Grantee shall ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
12. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
13. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAAS-OOA policy memoranda manual.
14. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable.

VI. Location and Time of Services

The details of the sites and operational hours are as attached in the Site Chart, (Appendix F).

VII. Service Objectives

On an annual basis, Grantee will meet the following service objectives:

1. Grantee will enroll at least the number of unduplicated consumers and provide the units of service detailed in Table A below.

TABLE A				
Service Objective Summary Table	*FY 2018-2019	FY 2019-2020	FY 2020-2021	Total – 3 years
Number of Unduplicated Consumers	50	200	200	450
Number of Intergenerational Programming Hours	142	570	570	1282
*Year One, FY 2018-2019, is 6 months only				

VIII. Outcome Objectives

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

1. At least 65% of the surveyed consumers will report that participating in the intergenerational program has helped them to develop new relationships or friendships.*
2. At least 60% of the surveyed consumers will report that participating in the intergenerational program has helped them to feel that they are valued community members by providing opportunities to communicate knowledge, utilize skills, share stories, etc.*
3. At least 50% of the consumers who screen as “lonely” using the Three Question UCLA Loneliness Scale will report a reduction in loneliness as evidence by a decrease in their loneliness score when comparing at least two questionnaires taken in a fiscal year.

**Based on a survey created by the grantee with input from DAAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAAS provided or DAAS approved intake form into the CA.GetCare database in accordance to DAAS policy.
3. Grantee will enter into the Ca.GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
 - Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAAS by March 15 each grant year or a mutually agreed upon date between DAAS and the Grantee.
8. Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by SF-HSA. The due date for submitting the annual summary report is no later than July 10 each grant year.

9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAAS.

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

tahir.shaikh@sfgov.org
Contract Manager, Office of Contract Management
Or
tiffany.kearney@sfgov.org
Dignity Fund Program Analyst
Department of Aging and Adult Services

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on CA.GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the elder abuse reporting, evidence that program staff have completed security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
2. 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.

Date: 9/18/18

SITE CHART Appendix F

FY: 2018-2019

AGENCY: KIMOCHI INC.

CONTRACT MAILING ADDRESS: 1715 BUCHANAN STREET SF, CA 94115

Agency's web site:
<https://www.kimochi-inc.org/>

DIRECTOR: STEVE ISHII

PHONE NO.: (415)931-2294

Program: Kimochi CARE Program

Total Annual # of UDC = 50

SITES: Name of Site

KIMOCHI ADMINISTRATION

KIMOCHI LOUNGE

KIMOCHI SENIOR CENTER

JCYC CHIBI CHAN PRESCHOOL

Address and Zip

1715 BUCHANAN STREET SF, CA 94115

1581 WEBSTER STREET #202 SF, CA 94115

1840 SUTTER STREET SF, CA 94115

2507 PINE STREET SF, CA 94115

Phone Number

(415) 931-2294

(415) 563-5626

(415)931-2287

(415) 351-0955

Fax Number

(415) 931-2299

(415) 931-2299

(415)931-2299

(415) 351-0950

Neighborhood

WESTERN ADDITION

WESTERN ADDITION

WESTERN ADDITION

WESTERN ADDITION

Supervisory District No.

5

5

5

5

Person in Charge:

STEVE ISHII

SHAWNE O'CONNELL

KAI FUKUMITSU

JENNIFER YIP

Site Manager/Coordinator

STEVE ISHII

SHAWNE O'CONNELL

KAI FUKUMITSU

JENNIFER YIP

Additional Programs Offered at Site

COMMUNITY SERVICE, FCSP, CM

COMMUNITY SERVICE

C1, C2, COMMUNITY SERVICES, TRANSPORTATION

Days Open

X Mon X Tues X Wed X Thurs X Fri X Sat X Sun

X Mon X Tues X Wed X Thurs X Fri X Sat X Sun

Mon Tues X Wed Thurs X Fri Sat Sun

X Mon X Tues X Wed X Thurs X Fri X Sat X Sun

Hours Open

9:00 a.m. - 5:00 p.m.

Sun-Mon 11:00 a.m. - 5:00 p.m., Tue-Sat 4:00 p.m. - 7:00 p.m.

2:00 p.m. - 4:00 p.m.

2:30 p.m. - 5:00 p.m.

Total number of Service Days

249

354

104

249

DAAAS Funded Meal Service (Yes/No)

NO

NO

YES

NO

Number of Service Days Closed

11

11

11

11

Days Closed (list holidays closed)

Agency Holidays: New Year's Day, Indigenous Peoples day, President's Day, Memorial Day, Labor Day, Independence Day, MLK Day, Veteran's Day, Thanksgiving and day after, Christmas Day

Agency Holidays: New Year's Day, Indigenous Peoples day, President's Day, Memorial Day, Labor Day, Independence Day, MLK Day, Veteran's Day, Thanksgiving and day after, Christmas Day

Agency Holidays: New Year's Day, Indigenous Peoples day, President's Day, Memorial Day, Labor Day, Independence Day, MLK Day, Veteran's Day, Thanksgiving and day after, Christmas Day

Agency Holidays: New Year's Day, Indigenous Peoples day, President's Day, Memorial Day, Labor Day, Independence Day, MLK Day, Veteran's Day, Thanksgiving and day after, Christmas Day

ADA Accessible

X Yes No

X Yes No

X Yes No

X Yes No

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name		Term		
KIMOCHI, INC.		FY2018-2021		
(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: Intergenerational Program				
Budget Reference Page No.(s)				Total
Program Term	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/19-6/30/21
Expenditures				
Salaries & Benefits	\$27,035	\$54,070	\$54,070	\$135,175
Operating Expense	\$18,941	\$33,969	\$33,969	\$86,879
Subtotal	\$45,976	\$88,039	\$88,039	\$222,054
Indirect Percentage (%)	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$6,896	\$13,205	\$13,205	\$33,306
Capital Expenditure	\$11,750	\$0	\$0	\$11,750
Total Expenditures	\$64,622	\$101,244	\$101,244	\$267,110
HSA Revenues				
General Fund	\$64,622	\$101,244	\$101,244	\$267,110
TOTAL HSA REVENUES	\$64,622	\$101,244	\$101,244	\$267,110
Other Revenues				
Total Revenues	\$64,622	\$101,244	\$101,244	\$267,110
Full Time Equivalent (FTE)	1	1	1	
Prepared by: Rod Valdepenas		Telephone No.: 415-931-2294		Date: 12/18/2018
HSA-CO Review Signature: _____				
HSA #1				11/15/2007

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		For HSA Program		1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/19-6/30/21
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	For DHS Program	For DHS Program	For DHS Program	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	
CARE Program Specialist	\$40,000	100%	100%	100%	\$20,000	\$40,000	\$40,000	\$100,000
TOTALS	\$40,000	1.00	1.00	1.00	\$20,000	\$40,000	\$40,000	\$100,000
FRINGE BENEFIT RATE	35%							
EMPLOYEE FRINGE BENEFITS	\$14,000				\$7,035	\$14,070	\$14,070	\$35,175
TOTAL SALARIES & BENEFITS	\$54,000				\$27,035	\$54,070	\$54,070	\$135,175
HSA #2	11/15/2007							

Program Name: Intergenerational
 (Same as Line 9 on HSA #1)

Operating Expense Detail

Expenditure Category	TERM			TOTAL
	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/19-6/30/21
Rental of Property				
Utilities(Elec, Water, Gas, Phone, Scavenger)	\$4,350	\$8,700	\$8,700	\$21,750
Office Supplies, Postage	\$1,916	\$1,000	\$1,000	\$3,916
Building Maintenance Supplies and Repair	\$0	\$0	\$0	\$0
Printing and Reproduction	\$1,300	\$1,519	\$1,519	\$4,338
Insurance	\$0	\$0	\$0	\$0
Staff Training	\$725	\$1,450	\$1,450	\$3,625
Staff Travel-(Local & Out of Town)	\$650	\$1,300	\$1,300	\$3,250
Rental of Equipment				
CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE				
Japanese Community Youth Council (JCYC) - travel, supplies, and stipends	\$10,000	\$20,000	\$20,000	\$50,000
OTHER				
TOTAL OPERATING EXPENSE	\$18,941	\$33,969	\$33,969	\$86,879

HSA #3

11/15/2007

Program Name: Intergenerational
 (Same as Line 9 on HSA #1)

Program Expenditure Detail

EQUIPMENT		TERM	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	TOTAL
No.	ITEM/DESCRIPTION					
15	IPads		\$ 6,000			6,000
5	Cameras		\$ 1,250			1,250
3	Laptops		\$ 4,500			4,500
						0
						0
						0
						0
						0
TOTAL EQUIPMENT COST			\$ 11,750			11,750
R E M O D E L I N G						
Description:						
TOTAL REMODELING COST						
TOTAL CAPITAL EXPENDITURE (Equipment and Remodeling Cost)			\$ 11,750			11,750
HSA #4						11/15/2007

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name		Term		
Kimochi (Subcontractor Japanese Community Youth Council)		FY2018-2021		
(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: Intergenerational Programs				
Budget Reference Page No.(s)				Total
Program Term	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/19-6/30/21
Expenditures				
Salaries & Benefits	\$4,440	\$12,642	\$12,642	\$29,724
Operating Expense	\$4,256	\$4,750	\$4,750	\$13,756
Subtotal	\$8,696	\$17,392	\$17,392	\$43,480
Indirect Percentage (%)	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$1,304	\$2,607.78	\$2,607.78	\$6,520
Capital Expenditure	\$0	\$0	\$0	\$0
Total Expenditures	\$10,000	\$20,000	\$20,000	\$50,000
HSA Revenues				
Subaward from Kimochi, Inc.	\$10,000	\$20,000	\$20,000	\$50,000
TOTAL HSA REVENUES	\$10,000	\$20,000	\$20,000	\$50,000
Other Revenues				
Total Revenues	\$10,000	\$20,000	\$20,000	\$50,000
Full Time Equivalent (FTE)				
Prepared by: Erika Tamura & Shana Kanzaki	Telephone No.: 415.563.8052		Date: 01/29/2019	
HSA-CO Review Signature:	_____			
HSA #1	11/15/2007			

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		For HSA Program		1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/19-6/30/21
	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	For DHS Program Budgeted Salary	For DHS Program Budgeted Salary	For DHS Program Budgeted Salary	TOTAL
Program Director of Youth Development	\$88,000	100%	6.5%	0.065	\$2,000	\$5,694	\$5,694	\$13,389
Director of Child Development Programs	\$88,000	100%	6.5%	0.065	\$2,000	\$5,694	\$5,694	\$13,389
TOTALS	\$176,000	2.00	0.13	0.13	\$4,000	\$11,389	\$11,389	\$26,778
FRINGE BENEFIT RATE	11%							
EMPLOYEE FRINGE BENEFITS	\$19,360				\$440	\$1,253	\$1,253	\$2,946
TOTAL SALARIES & BENEFITS	\$195,360				\$4,440	\$12,642	\$12,642	\$29,724
HSA #2	11/15/2007							

Program
 Name:
 Intergenerational Programs
 (Same as Line 9 on HSA #1)

Operating Expense Detail

Expenditure Category	TERM	TOTAL			
		1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/19-6/30/21
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage			\$250	\$250	\$500
Building Maintenance Supplies and Repair					
Printing and Reproduction			\$500	\$500	\$1,000
Insurance					
Staff Training		\$1,670			\$1,670
Staff Travel-(Local & Out of Town)		\$2,586			\$2,586
Rental of Equipment					
CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE					
OTHER					
Youth Tech Support Stipend			\$4,000	\$4,000	\$8,000
TOTAL OPERATING EXPENSE		\$4,256	\$4,750	\$4,750	\$13,756

HSA #3

11/15/2007

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE
LIGHTHOUSE FOR THE BLIND AND VISUALLY IMPAIRED

DIGNITY FUND

INTERGENERATIONAL PROGRAM

January 1, 2019 – June 30, 2021

I. Purpose of Grant

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with another generation through regularly planned activities and joint engagement with a goal of fostering relationships that are mutually beneficial.

II. Definitions

Adult with a Disability	A person who is 18 to 59 years of age living with a disability
CA.GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	Persons who identify with a race or ethnicity other than non-Hispanic White
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Dignity Fund (Fund)	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities.
Dignity Fund Community Needs Assessment (DFCNA)	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The first DFCNA was completed in fiscal year 17-18
Disability	A condition attributable to mental, cognitive or physical

	impairment, or a combination of mental, cognitive 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: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Fund	Dignity Fund
Generation	Individuals born and living at about the same time, regarded collectively.
Grantee	Lighthouse for the Blind and Visually Impaired
Intergenerational Program/Programming	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBT/LGBTQ	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OAC	Dignity Fund Oversight and Advisory Committee
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years of age or older; used interchangeably with the term "Senior"
Senior	Person who is 60 years of age or older; used interchangeably with the "Older Adult"
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Three Item UCLA Loneliness Scale	A scale that comprises three questions and measure three dimensions of loneliness. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/

Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the Intergenerational Program provided by the Grantee and reflected in CA.GetCare through program enrollment.
Unit of Service	One hour of Intergenerational Programming

III. Target Population

This grant will serve older adults and/or adults with disabilities living in the City and County of San Francisco. Additional target priorities include members of a population with one or more of the following equity factors identified in the DFCNA.

- Social Isolation
- Low Income
- Limited or No English Speaking Proficiency
- Communities of Color
- Sexual Orientation and Gender Identity

IV. Eligibility for Program Enrollment

1. A resident of San Francisco, and
2. A person who is an older adult or an adult with a disability

V. Description of Services

1. Grantee will provide intergenerational programming that brings together a minimum of two different generations and at least one of the participating generations must be inclusive of the target population and eligible for program enrollment.
2. Grantee will delineate each participating generation including the birth year the generation begins and the birth year the generation ends. (e.g., Millennials are born in 1980 to 2000, Generation X are born in 1961 to 1981). While there is not strictly defined birth years among experts for any generation, the oldest and youngest person within a generation for this grant agreement must be within twenty (20) years of age. The grantee must document its delineation for each of the participating generations.
3. Grantee will promote its intergenerational program to the eligible participants through targeted outreach.
4. Grantee will promote programming in the community; this can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, in newsletters/publications and social media when appropriate, and on the grantee's website(s).
5. Grantee will conduct outreach to individuals belonging to generations other than the target population to ensure that its intergenerational program brings together a minimum of two generations.

6. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved.
7. The intergenerational programming offered by the grantee will support relationship building between the participating generations.
8. The intergenerational programming offered by the grantee will create reciprocity between the participating generations.
9. The intergenerational programming offered by the grantee will consist of activities and interactions that are face to face.
10. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all consumers enrolled in the intergenerational program and track consumers' scores as needed to report annual outcome objectives.
11. Grantee shall ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
12. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
13. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAAS-OOA policy memoranda manual.
14. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable.

VI. Location and Time of Services

The details of the sites and operational hours are as attached in the Site Chart, (Appendix F).

VII. Service Objectives

On an annual basis, Grantee will meet the following service objectives:

1. Grantee will enroll at least the number of unduplicated consumers and provide the units of service detailed in Table A below.

Service Objective Summary Table	*FY 2018-2019	FY 2019- 2020	FY 2020- 2021	Total – 3 years
Number of Unduplicated Consumers	20	45	45	110
Number of Intergenerational Programming Hours	15	40	40	95
*Year One, FY 2018-2019, is 6 months only				

VIII. Outcome Objectives

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

1. At least 65% of the surveyed consumers will report that participating in the intergenerational program has helped them to develop new relationships or friendships.*
2. At least 60% of the surveyed consumers will report that participating in the intergenerational program has helped them to feel that they are valued community members by providing opportunities to communicate knowledge, utilize skills, share stories, etc.*
3. At least 50% of the consumers who screen as “lonely” using the Three Question UCLA Loneliness Scale will report a reduction in loneliness as evidence by a decrease in their loneliness score when comparing at least two questionnaires taken in a fiscal year.

**Based on a survey created by the grantee with input from DAAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAAS provided or DAAS approved intake form into the CA.GetCare database in accordance to DAAS policy.
3. Grantee will enter into the Ca.GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
 - Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAAS by March 15 each grant year or a mutually agreed upon date between DAAS and the Grantee.
8. Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by SF-HSA. The due date for submitting the annual summary report is no later than July 10 each grant year.

9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAAS.

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

tahir.shaikh@sfgov.org
Contract Manager, Office of Contract Management
Or
tiffany.kearney@sfgov.org
Dignity Fund Program Analyst
Department of Aging and Adult Services

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on CA.GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the elder abuse reporting, evidence that program staff have completed security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
2. 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.

Date: 1/15/19		FY: 1/1/2019-6/30/2019	
AGENCY: Lighthouse for the Blind and Visually Impaired		Appendix F	
CONTRACT MAILING ADDRESS: 1155 Market Street, 10th Fl., 94103		Agency's web site: lighthouse-sf.org	
CEO: Bryan Bashin		PHONE NO.: 415-431-1481	
Program: Intergenerational Program			
Total Annual # of UDC = 20	UDC/Site = 20		
SITES: Name of Site	Lighthouse for the Blind and Visually Impaired		
Address and Zip	1155 Market Street, 10th Floor, 94103		
Phone Number	415-431-1481		
Fax Number	415-863-7568		
Neighborhood	Mid Market		
Supervisory District No.	6		
Site Director	Scott Blanks		
Additional Programs Offered at Site	Senior Director of Programs Community Services, Tech Training, Daily Living, Counseling, Braille, White Cane Mobility, Youth Enrichment		
Days Open	X Mon X Tues X Wed X Thurs X Fri		
Hours Open	X Sat Sun 8:00 a.m. - 6:00 p.m.		
Total number of Service Days	296		
DAAS Funded Meal Service (Yes/No)	No		
Number of Service Days Closed	69		
Days Closed (list holidays closed)	New Year's Day, Martin Luther King Jr., President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Dec 25th - 31st, Fifth Saturdays		
ADA Accessible	X Yes No		

	A	B	C	D	E
1					Appendix B, Page
2					Document Date: 12/18/2018
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name			Term	
6	LightHouse for the Blind and Visually Impaired			1/1/2019 - 6/30/2021	
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:	Intergenerational Programs	Intergenerational Programs	Intergenerational Programs	
10	Budget Reference Page No.(s)				
11	Program Term	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	Total
12	Expenditures				
13	Salaries & Benefits	\$10,409	\$20,818	\$20,818	\$52,045
14	Operating Expense	\$2,950	\$5,900	\$5,900	\$14,750
15	Subtotal	\$13,359	\$26,718	\$26,718	\$66,795
16	Indirect Percentage (%)	10%	10%	10%	10%
17	Indirect Cost (Line 16 X Line 15)	\$1,336	\$2,672	\$2,672	\$6,680
18	Capital Expenditure	\$0	\$0	\$0	\$0
19	Total Expenditures	\$14,695	\$29,390	\$29,390	\$73,475
20	HSA Revenues				
21	General Fund	\$14,695	\$29,390	\$29,390	\$73,475
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$14,695	\$29,390	\$29,390	\$73,475
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$14,695	\$29,390	\$29,390	\$73,475
37	Full Time Equivalent (FTE)	0.23	0.23	0.23	
39	Prepared by: Alan Hencky	Telephone No.: 415-694-7369		Date 9/20/2018	
40	HSA-CO Review Signature: _____				
41	HSA #1				11/15/2007

	A	B	C	D	E	F	G	H	I	J	K
1											Appendix B, Page 3
2											Document Date: 12/18/2018
3											
4	Program Name: Intergenera										
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>1/1/19-6/30/19</u>		<u>7/1/19-6/30/20</u>		<u>7/1/20-6/30/21</u>		<u>1/1/19-6/30/21</u>
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										
18	Insurance										
19	Staff Training										
20	Staff Travel-(Local & Out of Town)				\$150		\$300		\$300		\$750
21	Rental of Equipment										
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE										
23	Interpreter services				\$300		\$600		\$600		\$1,500
24	Contracted instructors				\$500		\$1,000		\$1,000		\$2,500
25											
26											
27											
28	OTHER										
29											
30	Program Supplies				\$1,500		\$3,000		\$3,000		\$7,500
31	Student Transportation				\$500		\$1,000		\$1,000		\$2,500
32											
33											
34											
35	TOTAL OPERATING EXPENSE				\$2,950		\$5,900		\$5,900		\$14,750
36											
37	HSA #3										11/15/2007

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

MISSION NEIGHBORHOOD CENTERS INC.

DIGNITY FUND

INTERGENERATIONAL PROGRAM

January 1, 2019 – June 30, 2021

I. Purpose of Grant

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with another generation through regularly planned activities and joint engagement with a goal of fostering relationships that are mutually beneficial.

II. Definitions

Adult with a Disability	A person who is 18 to 59 years of age living with a disability
CA.GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	Persons who identify with a race or ethnicity other than non-Hispanic White
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Dignity Fund (Fund)	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities.
Dignity Fund Community Needs Assessment (DFCNA)	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The first DFCNA was completed in fiscal year 17-18
Disability	A condition attributable to mental, cognitive or physical

	impairment, or a combination of mental, cognitive 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: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Fund	Dignity Fund
Generation	Individuals born and living at about the same time, regarded collectively.
Grantee	Mission Neighborhood Center Inc.
Intergenerational Program/Programming	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBT/LGBTQ	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OAC	Dignity Fund Oversight and Advisory Committee
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years of age or older; used interchangeably with the term "Senior"
Senior	Person who is 60 years of age or older; used interchangeably with the "Older Adult"
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Three Item UCLA Loneliness Scale	A scale that comprises three questions and measure three dimensions of loneliness. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/

Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the Intergenerational Program provided by the Grantee and reflected in CA.GetCare through program enrollment.
Unit of Service	One hour of Intergenerational Programming

III. Target Population

This grant will serve older adults and/or adults with disabilities living in the City and County of San Francisco. Additional target priorities include members of a population with one or more of the following equity factors identified in the DFCNA.

- Social Isolation
- Low Income
- Limited or No English Speaking Proficiency
- Communities of Color
- Sexual Orientation and Gender Identity

IV. Eligibility for Program Enrollment

1. A resident of San Francisco, and
2. A person who is an older adult or an adult with a disability

V. Description of Services

1. Grantee will provide intergenerational programming that brings together a minimum of two different generations and at least one of the participating generations must be inclusive of the target population and eligible for program enrollment.
2. Grantee will delineate each participating generation including the birth year the generation begins and the birth year the generation ends. (e.g., Millennials are born in 1980 to 2000, Generation X are born in 1961 to 1981). While there is not strictly defined birth years among experts for any generation, the oldest and youngest person within a generation for this grant agreement must be within twenty (20) years of age. The grantee must document its delineation for each of the participating generations.
3. Grantee will promote its intergenerational program to the eligible participants through targeted outreach.
4. Grantee will promote programming in the community; this can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee will conduct outreach to individuals belonging to generations other than the target population to ensure that its intergenerational program brings together a minimum of two generations.

6. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved.
7. The intergenerational programming offered by the grantee will support relationship building between the participating generations.
8. The intergenerational programming offered by the grantee will create reciprocity between the participating generations.
9. The intergenerational programming offered by the grantee will consist of activities and interactions that are face to face.
10. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all consumers enrolled in the intergenerational program and track consumers' scores as needed to report annual outcome objectives.
11. Grantee shall ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
12. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
13. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAAS-OOA policy memoranda manual.
14. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable.

VI. Location and Time of Services

The details of the sites and operational hours are as attached in the Site Chart, (Appendix F).

VII. Service Objectives

On an annual basis, Grantee will meet the following service objectives:

1. Grantee will enroll at least the number of unduplicated consumers and provide the units of service detailed in Table A below.

TABLE A				
Service Objective Summary Table	*FY 2018-2019	FY 2019-2020	FY 2020-2021	Total – 3 years
Number of Unduplicated Consumers	40	80	80	200
Number of Intergenerational Programming Hours	48	96	96	240
*Year One, FY 2018-2019, is 6 months only				

VIII. Outcome Objectives

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

1. At least 65% of the surveyed consumers will report that participating in the intergenerational program has helped them to develop new relationships or friendships.*
2. At least 60% of the surveyed consumers will report that participating in the intergenerational program has helped them to feel that they are valued community members by providing opportunities to communicate knowledge, utilize skills, share stories, etc.*
3. At least 50% of the consumers who screen as “lonely” using the Three Question UCLA Loneliness Scale will report a reduction in loneliness as evidence by a decrease in their loneliness score when comparing at least two questionnaires taken in a fiscal year.

**Based on a survey created by the grantee with input from DAAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAAS provided or DAAS approved intake form into the CA.GetCare database in accordance to DAAS policy.
3. Grantee will enter into the Ca.GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
 - Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAAS by March 15 each grant year or a mutually agreed upon date between DAAS and the Grantee.
8. Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by SF-HSA. The due date for submitting the annual summary report is no later than July 10 each grant year.

9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAAS.

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

tahir.shaikh@sfgov.org
Contract Manager, Office of Contract Management
Or
tiffany.kearney@sfgov.org
Dignity Fund Program Analyst
Department of Aging and Adult Services

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on CA.GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the elder abuse reporting, evidence that program staff have completed security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
2. 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					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name			Term	
6	Mission Neighborhood Centers			01/01/2019 - 06/30/2021	
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: Intergenerational Program for Older Adults				
10	Budget Reference Page No.(s)				Total
11	Program Term	01/01/19- 6/30/2019	07/01/19- 6/30/2020	07/01/2020- 6/30/2021	01/01/19- 6/30/2021
12	Expenditures				
13	Salaries & Benefits	\$18,644	\$15,647	\$15,647	\$49,938
14	Operating Expense	\$8,140	\$7,938	\$7,938	\$24,016
15	Subtotal	\$26,784	\$23,585	\$23,585	\$73,954
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$4,018	\$3,537	\$3,537	\$11,092
18	Subcontractor/Capital Expenditures	\$20,888	\$14,899	\$14,899	\$50,686
19	Total Expenditures	\$51,690	\$42,021	\$42,021	\$135,732
20	HSA Revenues				
21	General Fund	\$51,690	\$42,021	\$42,021	\$135,732
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$51,690	\$42,021	\$42,021	\$135,732
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$51,690	\$42,021	\$42,021	\$135,732
37	Full Time Equivalent (FTE)	0.6	0.25	0.25	
39	Prepared by:	Maria Bermudez	Telephone No.:	415.206.7754	Date
40	HSA-CO Review Signature:	_____			
41	HSA #1				9/18/2018

Program Name: Intergenerational Program for Older Adults
 (Same as Line 9 on HSA #1)

Salaries & Benefits Detail

11	12	Agency Totals		HSA Program			01/01/19- 6/30/2019	07/01/19- 6/30/2020	07/01/2020- 6/30/2021	01/01/19- 6/30/2021	
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE 01/01/19 - 06/30/2019	% FTE funded by HSA (Max 100%)	Adjusted FTE 07/01/2019 - 06/30/2021	DHS Program	DHS Program	DHS Program	TOTAL
								Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Activities & Outreach Specialist	\$45,760	1.00	30%	0.30	10%	0.10	\$6,864	\$4,576	\$4,576	\$16,016
14	Senior Center Manager	\$60,000	1.00	10%	0.10	5%	0.05	\$3,000	\$3,000	\$3,000	\$9,000
15	Computer Instructor	\$43,680	1.00	20%	0.20	10%	0.10	\$4,368	\$4,368	\$4,368	\$13,104
16											
17											
18											
19											
20											
21											
22											
23											
24											
25											
26											
27											
28											
29											
30	TOTALS	\$ 149,440	3.00	60%	0.60	25%	0.25	\$14,232	\$11,944	\$11,944	\$38,120
31											
32	FRINGE BENEFIT RATE	31%									
33	EMPLOYEE FRINGE BENEFITS	\$46,328						\$4,412	3,703	\$3,703	\$11,818
34											
35											
36	TOTAL SALARIES & BENEFITS	\$195,766						\$18,644	\$15,647	\$15,647	\$49,938
37	HSA #2	9/18/2018									

	A	B	C	D	E	F	G	H	I	J	K
1	Appendix B, Page 3										
2											
3											
4	Program Name: Intergenera										
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>01/01/19- 6/30/2019</u>	<u>07/01/19- 6/30/2020</u>	<u>07/01/2020- 6/30/2021</u>					<u>TOTAL 01/01/19- 6/30/2021</u>
13	Rental of Property			\$90	\$90	\$90					\$ 270.00
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$304	\$304	\$304					\$ 912.00
15	Office Supplies, Postage			\$300	\$300	\$300					\$ 900.00
16	Building Maintenance Supplies and Repair			\$360	\$360	\$360					\$ 1,080.00
17	Printing and Reproduction			\$1,000	\$1,200	\$1,200					\$ 3,400.00
18	Insurance			\$426	\$504	\$504					\$ 1,434.00
19											
20											
21											
22											
23											
24											
25											
26	OTHER										
27	Fuel Maint & repairs			\$300	\$300	\$300					\$ 900.00
28	Advertising			\$800	\$500	\$500					\$ 1,800.00
29	Program Supplies			\$600	\$1,200	\$1,200					\$ 3,000.00
30	Food Supplies			\$3,600	\$2,400	\$2,400					\$ 8,400.00
31	Janitorial Supplies			\$360	\$780	\$780					\$ 1,920.00
32											
33	TOTAL OPERATING EXPENSE			\$8,140	\$7,938	\$7,938					\$24,016
34											
35	HSA #3										9/18/2018

	A	B	C	D	E	F	
1	Appendix B, Page 4						
2							
3							
4	Program Name: Intergenerational Program for Older Adults						
5	(Same as Line 9 on HSA #1)						
6							
7	Program Expenditure Detail						
8							
9							
10	SUB CONTRACTORS		TERM	01/01/19- 6/30/2019	07/01/19- 6/30/2020	07/01/2020- 6/30/2021	TOTAL 01/01/19- 6/30/2021
11	No.	ITEM/DESCRIPTION					
12		Music Instructor		\$3,000	\$3,250	\$3,250	\$9,500
13		Nutritionist Consultant		\$2,500	\$3,000	\$3,000	\$8,500
14		Technology Consultant Intern		\$3,000	\$6,000	\$6,000	\$15,000
15							
16							
17							
18							
19							
20	TOTAL SUBCONTRACTORS COST			\$8,500	\$12,250	\$12,250	\$33,000
21							
22	EQUIPMENT						
23	Description:						
24	Music Equipment			\$1,248	\$299	\$299	\$1,846
25	Kitchen Equipment			\$988	\$100	\$100	\$1,188
26	Technology Equipment			\$10,152	\$2,250	\$2,250	\$14,652
27							
28							
29	TOTAL EQUIPMENT COST			\$12,388	\$2,649	\$2,649	\$17,686
30							
31	TOTAL CAPITAL EXPENDITURE			\$20,888	\$14,899	\$14,899	\$50,686
32	(Equipment and Remodeling Cost)						
33	HSA #4						9/18/2018

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE
NORTHERN CALIFORNIA PRESBYTERIAN HOMES AND SERVICES
DIGNITY FUND
INTERGENERATIONAL PROGRAM

January 1, 2019 – June 30, 2021

I. Purpose of Grant

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with another generation through regularly planned activities and joint engagement with a goal of fostering relationships that are mutually beneficial.

II. Definitions

Adult with a Disability	A person who is 18 to 59 years of age living with a disability
CA.GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	Persons who identify with a race or ethnicity other than non-Hispanic White
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Dignity Fund (Fund)	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities.
Dignity Fund Community Needs Assessment (DFCNA)	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The first DFCNA was completed in fiscal year 17-18
Disability	A condition attributable to mental, cognitive or physical

	impairment, or a combination of mental, cognitive 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: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Fund	Dignity Fund
Generation	Individuals born and living at about the same time, regarded collectively.
Grantee	Northern California Presbyterian Homes and Services
Intergenerational Program/Programming	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBT/LGBTQ	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OAC	Dignity Fund Oversight and Advisory Committee
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years of age or older; used interchangeably with the term "Senior"
Senior	Person who is 60 years of age or older; used interchangeably with the "Older Adult"
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Three Item UCLA Loneliness Scale	A scale that comprises three questions and measure three dimensions of loneliness. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/

Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the Intergenerational Program provided by the Grantee and reflected in CA.GetCare through program enrollment.
Unit of Service	One hour of Intergenerational Programming

III. Target Population

This grant will serve older adults and/or adults with disabilities living in the City and County of San Francisco. Additional target priorities include members of a population with one or more of the following equity factors identified in the DFCNA.

- Social Isolation
- Low Income
- Limited or No English Speaking Proficiency
- Communities of Color
- Sexual Orientation and Gender Identity

IV. Eligibility for Program Enrollment

1. A resident of San Francisco, and
2. A person who is an older adult or an adult with a disability

V. Description of Services

1. Grantee will provide intergenerational programming that brings together a minimum of two different generations and at least one of the participating generations must be inclusive of the target population and eligible for program enrollment.
2. Grantee will delineate each participating generation including the birth year the generation begins and the birth year the generation ends. (e.g., Millennials are born in 1980 to 2000, Generation X are born in 1961 to 1981). While there is not strictly defined birth years among experts for any generation, the oldest and youngest person within a generation for this grant agreement must be within twenty (20) years of age. The grantee must document its delineation for each of the participating generations.
3. Grantee will promote its intergenerational program to the eligible participants through targeted outreach.
4. Grantee will promote programming in the community; this can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee will conduct outreach to individuals belonging to generations other than the target population to ensure that its intergenerational program brings together a minimum of two generations.

6. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved.
7. The intergenerational programming offered by the grantee will support relationship building between the participating generations.
8. The intergenerational programming offered by the grantee will create reciprocity between the participating generations.
9. The intergenerational programming offered by the grantee will consist of activities and interactions that are face to face.
10. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all consumers enrolled in the intergenerational program and track consumers' scores as needed to report annual outcome objectives.
11. Grantee shall ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
12. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
13. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAAS-OOA policy memoranda manual.
14. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable.

VI. Location and Time of Services

The details of the sites and operational hours are as attached in the Site Chart, (Appendix F).

VII. Service Objectives

On an annual basis, Grantee will meet the following service objectives:

1. Grantee will enroll at least the number of unduplicated consumers and provide the units of service detailed in Table A below.

Service Objective Summary Table	*FY 2018-2019	FY 2019- 2020	FY 2020- 2021	Total – 3 years
Number of Unduplicated Consumers	188	314	418	920
Number of Intergenerational Programming Hours	150	400	450	1000
*Year One, FY 2018-2019, is 6 months only				

VIII. Outcome Objectives

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

1. At least 65% of the surveyed consumers will report that participating in the intergenerational program has helped them to develop new relationships or friendships.*
2. At least 60% of the surveyed consumers will report that participating in the intergenerational program has helped them to feel that they are valued community members by providing opportunities to communicate knowledge, utilize skills, share stories, etc.*
3. At least 50% of the consumers who screen as “lonely” using the Three Question UCLA Loneliness Scale will report a reduction in loneliness as evidence by a decrease in their loneliness score when comparing at least two questionnaires taken in a fiscal year.

**Based on a survey created by the grantee with input from DAAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAAS provided or DAAS approved intake form into the CA.GetCare database in accordance to DAAS policy.
3. Grantee will enter into the Ca.GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
 - Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAAS by March 15 each grant year or a mutually agreed upon date between DAAS and the Grantee.
8. Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by SF-HSA. The due date for submitting the annual summary report is no later than July 10 each grant year.

9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAAS.

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

tahir.shaikh@sfgov.org
Contract Manager, Office of Contract Management
Or
tiffany.kearney@sfgov.org
Dignity Fund Program Analyst
Department of Aging and Adult Services

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on CA.GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the elder abuse reporting, evidence that program staff have completed security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
2. 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.

Appendix F - SITE CHART - Intergenerational Program

AGENCY: Northern California Presbyterian Homes and Services		Agency's web site: www.NCPHS.org	
CONTRACT MAILING ADDRESS: 1525 Post Street, San Francisco, CA 94109			
DIRECTOR: Gina Rodriguez		PHONE NO.: 415-351-3641	
Program: Intergenerational Program			
Total Annual # of UDC = 188			
SITES: Name of Site			
Western Park Apartments		Eastern Park Apartments	
Address and Zip	1280 Laguna St. 94115	711 Eddy St. 94109	871 Turk St. 94102
Phone Number	415-202-2947	415-775-5052	415-934-1001
Fax Number	415-922-9457	415-776-0536	415-934-1002
Neighborhood	Western Addition	Tenderloin	Western Addition
Supervisory District No.	5	6	5
Person in Charge (Service Supervisor):	Melissa Parker	Melissa Parker	Melissa Parker
Housing Site Manager/ Resident Service Coordinator	B. Miyake/ J. Nagel	L. Litvak/ E. Lai	V. Eung / B. Howlett
Additional Programs Offered at Site	Affordable housing & Resident Service Coordination	Affordable housing & Resident Service Coordination	Affordable housing & Resident Service Coordination
Days Open - Services staff available	x Mon x Tues x Wed x Thurs x Fri	x Mon x Tues x Wed x Thurs x Fri	x Mon x Tues x x Thurs x Fri
Hours Open	8:30 - 4:30	8:30 - 4:30	8:30 - 4:30
Total number of Service Days	129	129	129
DAAS Funded Meal Service (Yes/No)	No	No	No
Number of Service Days Closed	5	5	5
Days Closed (list holidays closed)	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

	A	B	C	D	E
1					Appendix B, Page 1
2					Document Date: 1/18/2019
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name			Term	
6				1/1/2019-6/30/2021	
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: NCPHS Intergenerational Program				
10	Budget Reference Page No.(s)				Total
11	Program Term	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/2019-6/30/2021
12	Expenditures				
13	Salaries & Benefits	\$50,625	\$101,250	\$101,250	\$253,125
14	Operating Expense	\$14,592	\$29,185	\$29,185	\$72,962
15	Subtotal	\$65,217	\$130,435	\$130,435	\$326,087
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$9,783	\$19,565	\$19,565	\$48,913
18	Capital Expenditure	\$0	\$0	\$0	
19	Total Expenditures	\$75,000	\$150,000	\$150,000	\$375,000
20	HSA Revenues				
21	General Fund	\$75,000	\$150,000	\$150,000	\$375,000
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$75,000	\$150,000	\$150,000	\$375,000
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$75,000	\$150,000	\$150,000	\$375,000
37	Full Time Equivalent (FTE)	1	1	1	
39	Prepared by: Tina Sha and Sue Dichter		Telephone No.: 415-351-3648		Date 1/18/19
40	HSA-CO Review Signature: _____				
41	HSA #1				11/15/2007

Program: NCPHS Intergenerational Program
 (Same as Line 9 on HSA #1)

Operating Expense Detail

12	Expenditure Category	TERM	1/1/19-6/30/19	7/1/19-6/30/20	To 7/1/20-6/30/21	TOTAL 1/1/2019- 6/30/2021
13	Rental of Property		\$2,040	\$4,085	\$4,085	\$10,210
14	Utilities(Elec, Water, Gas, Phone, Scavenger)		\$600	\$1,200	\$1,200	\$3,000
15	Office Supplies, Postage		\$1,500	\$1,000	\$1,000	\$3,500
16	Building Maintenance Supplies and Repair		\$300	\$600	\$600	\$1,500
17	Printing and Reproduction		\$300	\$600	\$600	\$1,500
18	Insurance					\$0
19	Staff Training		\$450	\$1,000	\$1,000	\$2,450
20	Staff Travel-(Local & Out of Town)		\$1,800	\$3,700	\$3,700	\$9,200
21	Rental of Equipment					\$0
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE					
23	Gardening Instructor (on-site training for services staff)		\$600	\$1,200	\$1,200	\$3,000
24	Arts and Crafts Instructor (on-site training for services staff)		\$600	\$1,200	\$1,200	\$3,000
25	Rhythm and Movement Instructor (on-site training for services staff)		\$600	\$1,200	\$1,200	\$3,000
26						
27						
28	OTHER					
29	Snacks and Beverages for activities and mentoring training sessions		\$802	\$2,800	\$2,800	\$6,402
30	Arts and crafts supplies		\$1,600	\$3,000	\$3,000	\$7,600
31	Gardening supplies (indoor and outdoor depending on site)		\$2,000	\$4,000	\$4,000	\$10,000
32	Movement and rhythm equipment		\$1,000	\$2,000	\$2,000	\$5,000
33	Ipods and headphones for Alive Inside activity		\$400	\$1,600	\$1,600	\$3,600
34						
35	TOTAL OPERATING EXPENSE		\$14,592	\$29,185	\$29,185	\$72,962
36						
37	HSA #3					11/15/2007

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

OPENHOUSE

DIGNITY FUND

INTERGENERATIONAL PROGRAM

January 1, 2019 – June 30, 2021

I. Purpose of Grant

The purpose of this grant is to provide an intergenerational program for older adults and/or adults with disabilities living in the City and County of San Francisco. An intergenerational program will bring together older adults and/or adults with disabilities with another generation through regularly planned activities and joint engagement with a goal of fostering relationships that are mutually beneficial.

II. Definitions

Adult with a Disability	A person who is 18 to 59 years of age living with a disability
CA.GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	Persons who identify with a race or ethnicity other than non-Hispanic White
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Dignity Fund (Fund)	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities.
Dignity Fund Community Needs Assessment (DFCNA)	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The first DFCNA was completed in fiscal year 17-18
Disability	A condition attributable to mental, cognitive or physical

	impairment, or a combination of mental, cognitive 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: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Fund	Dignity Fund
Generation	Individuals born and living at about the same time, regarded collectively.
Grantee	Openhouse
Intergenerational Program/Programming	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
LGBT/LGBTQ	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OAC	Dignity Fund Oversight and Advisory Committee
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years of age or older; used interchangeably with the term "Senior"
Senior	Person who is 60 years of age or older; used interchangeably with the "Older Adult"
SF-HSA	Human Services Agency of the City and County of San Francisco
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Three Item UCLA Loneliness Scale	A scale that comprises three questions and measure three dimensions of loneliness. https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/

Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the Intergenerational Program provided by the Grantee and reflected in CA.GetCare through program enrollment.
Unit of Service	One hour of Intergenerational Programming

III. Target Population

This grant will serve older adults and/or adults with disabilities living in the City and County of San Francisco. Additional target priorities include members of a population with one or more of the following equity factors identified in the DFCNA.

- Social Isolation
- Low Income
- Limited or No English Speaking Proficiency
- Communities of Color
- Sexual Orientation and Gender Identity

IV. Eligibility for Program Enrollment

1. A resident of San Francisco, and
2. A person who is an older adult or an adult with a disability

V. Description of Services

1. Grantee will provide intergenerational programming that brings together a minimum of two different generations and at least one of the participating generations must be inclusive of the target population and eligible for program enrollment.
2. Grantee will delineate each participating generation including the birth year the generation begins and the birth year the generation ends. (e.g., Millennials are born in 1980 to 2000, Generation X are born in 1961 to 1981). While there is not strictly defined birth years among experts for any generation, the oldest and youngest person within a generation for this grant agreement must be within twenty (20) years of age. The grantee must document its delineation for each of the participating generations.
3. Grantee will promote its intergenerational program to the eligible participants through targeted outreach.
4. Grantee will promote programming in the community; this can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, in newsletters/publications and social media when appropriate, and on the grantee's website(s).
5. Grantee will conduct outreach to individuals belonging to generations other than the target population to ensure that its intergenerational program brings together a minimum of two generations.

6. The intergenerational programming offered by the grantee will consist of activities and engagement that is structured, ongoing, and jointly participated in by each of the generations involved.
7. The intergenerational programming offered by the grantee will support relationship building between the participating generations.
8. The intergenerational programming offered by the grantee will create reciprocity between the participating generations.
9. The intergenerational programming offered by the grantee will consist of activities and interactions that are face to face.
10. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all consumers enrolled in the intergenerational program and track consumers' scores as needed to report annual outcome objectives.
11. Grantee shall ensure adequate and culturally competent staffing (paid and/or volunteer) to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
12. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules.
13. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAAS-OOA policy memoranda manual.
14. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable.

VI. Location and Time of Services

The details of the sites and operational hours are as attached in the Site Chart, (Appendix F).

VII. Service Objectives

On an annual basis, Grantee will meet the following service objectives:

1. Grantee will enroll at least the number of unduplicated consumers and provide the units of service detailed in Table A below.

Service Objective Summary Table	*FY 2018-2019	FY 2019- 2020	FY 2020- 2021	Total – 3 years
Number of Unduplicated Consumers	125	225	300	650
Number of Intergenerational Programming Hours	800	1080	1280	3160
*Year One, FY 2018-2019, is 6 months only				

VIII. Outcome Objectives

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

1. At least 65% of the surveyed consumers will report that participating in the intergenerational program has helped them to develop new relationships or friendships.*
2. At least 60% of the surveyed consumers will report that participating in the intergenerational program has helped them to feel that they are valued community members by providing opportunities to communicate knowledge, utilize skills, share stories, etc.*
3. At least 50% of the consumers who screen as “lonely” using the Three Question UCLA Loneliness Scale will report a reduction in loneliness as evidence by a decrease in their loneliness score when comparing at least two questionnaires taken in a fiscal year.

**Based on a survey created by the grantee with input from DAAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAAS provided or DAAS approved intake form into the CA.GetCare database in accordance to DAAS policy.
3. Grantee will enter into the Ca.GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
 - Number of unduplicated consumers served during the month.
 - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAAS by March 15 each grant year or a mutually agreed upon date between DAAS and the Grantee.
8. Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by SF-HSA. The due date for submitting the annual summary report is no later than July 10 each grant year.

9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAAS.

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

tahir.shaikh@sfgov.org
Contract Manager, Office of Contract Management
Or
tiffany.kearney@sfgov.org
Dignity Fund Program Analyst
Department of Aging and Adult Services

X. Monitoring Activities

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on CA.GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the elder abuse reporting, evidence that program staff have completed security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections V, VI, VII, VIII and XI.
2. 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.

9.16.18		FY: 18/19	
AGENCY: Openhouse		SITE CHART Appendix F	
CONTRACT MAILING ADDRESS: 65 Laguna Street, San Francisco, CA 94102		Agency's web site: www.openhouse-sf.org	
DIRECTOR: Michelle Alcedo		PHONE NO.: 415.728.1095	
Program: Intergenerational Program	Intergenerational Programs for Older Adults and Adults with Disabilities		
Total Annual # of UDC = 125	Openhouse Bob Ross LGBT Senior Center		
SITES: Name of Site			
Address and Zip	65 Laguna St., San Francisco, CA 94102		
Phone Number	415.296.8995		
Fax Number	415.296.8008		
Neighborhood	Castro/Hayes Valley/Mission		
Supervisory District No.	8		
Person in Charge:	Karyn Skulkety PhD, <i>Executive Director</i>		
Site Manager/Coordinator	Matthew Cimino, <i>Director of Operations</i>		
Additional Programs Offered at Site	Community Services; Housing Assistance and Counseling; Case Management; ADR; Friendly Visitor; Lifelong Learning; Health and Wellness; Community Engagement Programming		
Days Open	X Mon X Tues X Wed X Thurs X Fri X Sat Sun		
Hours Open	9:30AM-5:30PM		
Total number of Service Days	302		
DAAS Funded Meal Service (Yes/No)	NO		
Number of Service Days Closed	10		
Days Closed (list holidays closed)	Holidays closed: New Year's Day, MLK, President's Day, Memorial Day, Day after SF Pride, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day		
ADA Accessible		X Yes ___ No	

	A	B	C	D	E
1	Appendix B, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name		Term		
6	Openhouse		1/1/19-6/30/21		
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: Intergenerational Programs for Older Adults and Adults With Disabilities				
10	Budget Reference Page No.(s)				Total
11	Program Term	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/19-6/30/21
12	Expenditures				
13	Salaries & Benefits	\$43,328	\$86,658	\$86,658	\$216,644
14	Operating Expenses	\$11,225	\$13,004	\$13,004	\$37,233
15	Subtotal	\$54,553	\$99,662	\$99,662	\$253,877
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$8,183	\$14,949	\$14,949	\$38,081
18	Subcontractor/Capital Expenditures	\$21,853	\$95,806	\$95,806	\$213,465
19	Total Expenditures	\$84,589	\$210,417	\$210,417	\$505,423
20	HSA Revenues				
21	General Fund	\$84,589	\$210,417	\$210,417	\$505,423
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$84,589	\$210,417	\$210,417	\$505,423
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$84,589	\$210,417	\$210,417	\$505,423
37	Full Time Equivalent (FTE)				
39	Prepared by: Matthew Cimino	Telephone No.: 415-530-2783			9/17/2018
40	HSA-CO Review Signature:	_____			
41	HSA #1				6/20/2018

	A	B	C	D	E	F	G	H	I
1									
2									
3	Openhouse								
4	Program: Intergenerational Programs for Older Adults and Adults With Disabilities								
5	(Same as Line 9 on HSA #1)								
6									
7	Salaries & Benefits Detail								
8									
9									
10									
11		Agency Totals		HSA Program		1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	1/1/19-6/30/21
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAAS Budgeted Salary	DAAS Budgeted Salary	DAAS Budgeted Salary	TOTAL Budgeted Salary
13	Friendly Visitor Supervisor	\$50,000	0.80	100%	0.80	\$20,000	\$40,000	\$40,000	\$100,000
14	Comm. Eng. Coordinator	\$48,900	0.80	50%	0.40	\$9,780	\$19,560	\$19,560	\$48,900
15	Mgr. of Comm. Engagement	\$64,238	1.00	20%	0.20	\$6,327	\$12,655	\$12,655	\$31,637
16									
17									
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25									
26									
27									
28									
29									
30	TOTALS	\$ 163,138	2.60	170%	1.40	\$36,107	\$72,215	\$72,215	\$180,637
31									
32	FRINGE BENEFIT RATE	20%							
33	EMPLOYEE FRINGE BENEFITS	\$32,628				\$7,221	\$14,443	\$14,443	\$36,107
34									
35									
36	TOTAL SALARIES & BENEFITS	\$195,766				\$43,328	\$86,658	\$86,658	\$216,644
37	HSA #2	6/20/2018							

	A	B	C	D	E	F	G	H	I	J	K	L
1	Appendix B, Page 3											
2												
3	Openhouse											
4	Program: Intergenerational Programs for Older Adults and Adults With Disabilities											
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>1/1/19-6/30/19</u>		<u>7/1/19-6/30/20</u>		<u>1/1/19-6/30/21</u>			<u>TOTAL</u> <u>1/1/19-6/30/21</u>
13	Rental of Property											
14	Utilities(Elec, Water, Gas, Phone, Garbage)											
15	Office Supplies, Postage				\$2,680		\$3,101		\$3,101			\$8,882
16	Building Maintenance Supplies and Repair											
17	Printing and Reproduction				\$320		\$590		\$590			\$1,500
18	Insurance											
19	Staff Training											
20	Staff Travel-(Local & Out of Town)				\$575		\$1,438		\$1,438			\$3,451
21	Rental of Equipment											
22												
23	CONSULTANTS											
24	Background Checks				\$150		\$375		\$375			\$900
25												
26												
27	OTHER											
28	Food, Drink, and Misc for Intergen Programming				\$7,500		\$7,500		\$7,500			\$22,500
29												
30												
31	TOTAL OPERATING EXPENSE				\$ 11,225		\$ 13,004		\$ 13,004			\$37,233
32												
33	HSA #3											6/20/2018

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	A	B	C	D	E
1	Appendix B, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name		Term		
6	Openhouse (subcontractor UCSF)		1/1/19-6/30/21		
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: Intergenerational				
10	Budget Reference Page No. (s)				1/1/19-6/30/21
11	Program Term	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	Total
12	Expenditures				
13	Salaries & Benefits	\$0	\$62,130	\$62,130	\$124,260
14	Operating Expenses	\$5,595	\$1,440	\$1,440	\$8,475
15	Subtotal	\$5,595	\$63,570	\$63,570	\$132,735
16	Indirect Percentage (%)	0%	0%	0%	
17	Indirect Cost (Line 16 X Line 15)	\$0	\$0	\$0	\$0
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0
19	Total Expenditures	\$5,595	\$63,570	\$63,570	\$132,735
20	HSA Revenues				
21	General Fund	\$5,595	\$63,570	\$63,570	\$132,735
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$5,595	\$63,570	\$63,570	\$132,735
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$5,595	\$63,570	\$63,570	\$132,735
37	Full Time Equivalent (FTE)	0.50	0.50	0.50	
39	Prepared by:		Telephone No.:		
40	HSA-CO Review Signature:		_____		
41	HSA #1				6/20/2018

	A	B	C	D	E
1	Appendix B, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name		Term		
6	Openhouse (Subcontractor LBFE)		1/1/19-6/30/21		
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: Intergenerational				
10	Budget Reference Page No.(s)				1/1/19-6/30/21
11	Program Term	1/1/19-6/30/19	7/1/19-6/30/20	7/1/20-6/30/21	Total
12	Expenditures				
13	Salaries & Benefits	\$14,138	\$28,031	\$28,031	\$70,200
14	Operating Expenses	\$0	\$0	\$0	\$0
15	Subtotal	\$14,138	\$28,031	\$28,031	\$70,200
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$2,120	\$4,205	\$4,205	\$10,530
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0
19	Total Expenditures	\$16,258	\$32,236	\$32,236	\$80,730
20	HSA Revenues				
21	General Fund	\$16,258	\$32,236	\$32,236	\$80,730
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$16,258	\$32,236	\$32,236	\$80,730
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$16,258	\$32,236	\$32,236	\$80,730
37	Full Time Equivalent (FTE)				
39	Prepared by:		Telephone No.:		
40	HSA-CO Review Signature: _____				
41	HSA #1				6/20/2018

