



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 *JuJ*

DATE: JUNE 5, 2019

SUBJECT: **GRANT MODIFICATION: MULTIPLE GRANTEES (NON-PROFIT) FOR THE PROVISION OF NATURALIZATION SERVICES FOR OLDER ADULTS AND ADULTS WITH DISABILITIES (see table on the next page)**

GRANT TERM:	<u>Current</u> 7/1/18- 6/30/19	<u>Modification</u> 7/1/19- 6/30/20	<u>Revised</u> 7/1/18- 6/30/20	<u>Contingency</u>	<u>Total</u> 7/1/18- 6/30/20
GRANT AMOUNT:	\$748,134	\$743,134	\$1,491,268	\$149,126	\$1,640,394
ANNUAL AMOUNT:	<u>FY 19/20</u> \$743,134				
FUNDING SOURCE	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
MODIFICATION FUNDING:	\$743,134			\$74,313	\$817,447
PERCENTAGE:	100%				100%

The Department of Aging & Adult Services (DAAS) requests authorization to modify the current grant agreements with multiple non-profit agencies as listed below for the period of July 1, 2019 to June 30, 2020, in an amount of \$743,134 plus a 10% contingency for a total amount not to exceed \$1,640,394. The purpose of these grants is to provide services for lawful permanent residents (LPRs) to complete the naturalization process to become U.S. citizens.

<u>GRANTEE</u>	<u>FY 18/19 Annual Amount</u>	<u>FY 19/20 Annual Amount</u>	<u>Total FY 18-20</u>	<u>Contingency</u>	<u>Total Grant Amount FY 18-20</u>
Asian Pacific Islander Legal Outreach dba of Nihonmachi Legal Outreach	\$152,672	\$147,672	\$300,344	\$30,034	\$330,378
Centro Latino De San Francisco, Inc.	\$115,503	\$115,503	\$231,006	\$23,100	\$254,106
International Institute of the Bay Area	\$185,198	\$185,198	\$370,396	\$37,040	\$407,436
Jewish Family and Children's Services	\$81,225	\$81,225	\$162,450	\$16,245	\$178,695
La Raza Centro Legal, Inc.	\$43,519	\$43,519	\$87,038	\$8,704	\$95,742
Self Help for The Elderly	\$170,017	\$170,017	\$340,034	\$34,003	\$374,037
	\$748,134	\$743,134	\$1,491,268	\$149,126	\$1,640,394

Background

The primary goal of naturalization services is to help lawful permanent residents (LPRs) to become naturalized citizens of the United States. In 2016, there were 48,000 estimated individuals in the City and County of San Francisco eligible to become U.S. citizens. Helping vulnerable members of this group successfully navigate the complex naturalization process is important for a number of reasons, including:

- Financial Security
- Freedom of Travel
- Ability to vote
- Access to certain government/federal benefits

Services to be Provided

These grant modifications will help aid older adults and adults with disabilities in obtaining citizenship. Grantee may offer one or more of the following services as described:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.

3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Selection

Grantees were selected through Request for Proposals (RFP) 635, which was competitively bid in February 2015.

Performance

- Asian Pacific Islander Legal Outreach dba of Nihonmachi Legal Outreach
 - Program Monitoring: April 2019 - Agency is compliant with no findings.
 - Fiscal Monitoring: January 2019 – Findings to be resolved in June 2019. Currently in Technical Assistance, through the controller’s office. Findings to be resolved by June 2019 includes item from Fiscal Policies and Procedures section and Board Oversight section.
- Centro Latino de San Francisco, Inc.
 - Program Monitoring: March 2019 - Agency is compliant with no findings.
 - Fiscal Monitoring: May 2019- Agency is compliant with findings resolved.
- International Institute of the Bay Area
 - Program Monitoring: March 2019 - Agency is compliant with no findings.
 - Fiscal Monitoring: Agency received a waiver for FY 18-19 because they are fully compliant.
- Jewish Family and Children's Services
 - Program Monitoring: March 2019 - Agency is compliant with findings resolved.
 - Fiscal Monitoring: April 2018 – Agency is compliant with no findings for FY 17-18. Fiscal Monitoring for FY 18-19 is pending.
- La Raza Centro Legal, Inc.
 - Program Monitoring: May 2019 - Agency is compliant with findings resolved.
 - Fiscal Monitoring: March 2019 - Findings to be resolved in June 2019. Findings include item from Audited Financial Statements, Financial Reports, and Board Oversight section.
- Self Help for the Elderly
 - Program Monitoring: March 2019 - Agency is compliant with no findings.
 - Fiscal Monitoring: March 2019- Agency is compliant with no findings.

Funding

The funding is 100% County General Fund.

Attachments

Asian Pacific Islander Legal Outreach dba of Nihonmachi Legal Outreach

Appendix A1-Services to be Provided

Appendix B1- Program Budget

Centro Latino De San Francisco, Inc.

Appendix A1-Services to be Provided

Appendix B1- Program Budget

Appendix F- Site Chart

International Institute of the Bay Area

Appendix A1-Services to be Provided

Appendix B1- Program Budget

Appendix F- Site Chart

Jewish Family and Children's Services

Appendix A1-Services to be Provided

Appendix B1- Program Budget

Appendix F- Site Chart

La Raza Centro Legal Inc.

Appendix A1-Services to be Provided

Appendix B1- Program Budget

Self Help for the Elderly

Appendix A1-Services to be Provided

Appendix B1- Program Budget

Appendix F- Site Chart

APPENDIX A1 – SERVICES TO BE PROVIDED

Asian Pacific Islander Legal Outreach (dba of Nihonmachi Legal Outreach)

NATURALIZATION SERVICES

July 1, 2018 to June 30, 2020

I. Purpose

The purpose of this grant is to provide services for Lawful Permanent Residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with a Disability	Person 18-59 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 units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, 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.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)
HSA	Human Services Agency of the City and County of San Francisco

Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OOA	Office on the Aging
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services

Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

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

- Low-income
- Non or limited –English speaking
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Location and Time of Services

Naturalization Legal Services are provided at Grantee's main office located at 1121 Mission Street in San Francisco. Services are provided Monday through Friday during regular business hours. Subcontracted services will take place off-site, within San Francisco, at a place and times to be determined.

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.

3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve **45** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.
- Grantee will provide **305** units of service of Legal Services hours.

Via a subcontract with (subcontractor pending), Grantee will provide the following Service Objectives, on an annual basis, in addition to the ones listed above:

- Grantee will serve **15** unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide **127** units of service of Citizenship/ESL class hours.
- Grantee will provide **80** units of service of One-to-One Assistance hours.

Additionally:

- At least **75%** of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose Citizenship/ESL classes started in a previous year.*

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by Grantee and provided during the annual program monitoring process:

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.

- Quantity of language waivers filed in the contract year on behalf of clients.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided. They shall be collected by Grantee and provided during the annual program monitoring process:

- Quantity of clients completing the naturalization process (becoming Citizens) during the contract year.

VIII. Reporting and Other Requirements

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

- A. The 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.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- D. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- G. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Michael Zaugg
Director, Office on the Aging
Michael.Zaugg@sfgov.org

Steve Kim
Contract Manager
Steve.Kim@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B1, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4				
5	Name			
6	Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)			
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>			
8	If modification, Effective Date of Mod. 07/1/2019		No. of Mod. 1	
9	Program: Naturalization			
10	Budget Reference Page No.(s)		NEW	TOTAL
11	Program Term		7/1/19-6/30/20	7/1/18-6/30/20
12	Expenditures			
13	Salaries & Benefits	\$85,654	\$77,872	\$163,526
14	Operating Expenses	\$18,225	\$24,452	\$42,677
15	Subtotal	\$103,879	\$102,324	\$206,203
16	Indirect Percentage (%)	13%	15%	14%
17	Indirect Cost (Line 16 X Line 15)	\$13,793	\$15,348	\$29,141
18	Capital/Subcontractor Expenditures	\$35,000	\$30,000	\$65,000
19	Total Expenditures	\$152,672	\$147,672	\$300,344
20	HSA Revenues			
21				
22	General Fund	\$152,672	\$147,672	\$300,344
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$152,672	\$147,672	\$300,344
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$152,672	\$147,672	\$300,344
37	Full Time Equivalent (FTE)	1.21	1.25	
39	Prepared by: Dean Ito Taylor			5/20/2019
40	HSA-CO Review Signature:			
41	HSA #1			6/5/2019

	A	B	C	D	E
1	Appendix B1, Page 4				
2					
3	Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)				
4	Program: Naturalization				
5	(Same as Line 9 on HSA #1)				
6	Program Expenditure Detail				
7					
8				NEW	TOTAL
9	SUBCONTRACTORS		7/1/18-6/30/19	7/1/19-6/30/20	7/1/18-6/30/20
10		Pilipino Senior Resource Center	\$20,000	\$30,000	\$50,000
11					
12	TOTAL SUBCONTRACTOR COST		\$20,000	\$30,000	\$50,000
13					
14	EQUIPMENT		TERM		
15	No.	ITEM/DESCRIPTION			
16					
17					
18					
19	TOTAL EQUIPMENT COST				
20					
21	OTHER				
22	Description:				
23					
24	Emergency Preparedness		\$15,000		\$15,000
25					
26					
27	TOTAL REMODELING COST		\$15,000		\$15,000
28					
29	TOTAL CAPITAL/SUBCONTRACTOR EXPENDITURE		\$35,000	\$30,000	\$65,000
30					
31	HSA #4				6/5/2019

APPENDIX A1 – SERVICES TO BE PROVIDED

CENTRO LATINO DE SAN FRANCISCO

NATURALIZATION SERVICES

Effective July 1, 2019 to June 30, 2020

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with a Disability	Person 18-59 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 units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, 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.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Centro Latino de San Francisco
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OOA	Office on the Aging
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

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

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

- Member of LGBTQ+ Community

IV. Location and Time of Services

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

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve 750 unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.

- Grantee will serve 145 unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide 557 units of service of Citizenship/ESL class hours.
- Grantee will provide 722 units of service of One-to-One Assistance hours.
- Grantee will provide N/A units of service of Legal Services hours. *(Agency primarily provides one-to-one assistance for this program)*
- At least 75% of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose Citizenship/ESL classes started in a previous year.*

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by Grantee and provided during the annual program monitoring process:

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided. They shall be collected by Grantee and provided during the annual program monitoring process:

- Quantity of clients completing the naturalization process (becoming Citizens) during the contract year.

VIII. Reporting and Other Requirements

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

- A. The 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.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.

- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- D. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- G. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Paulo Salta
 Program Analyst
 DAAS, Office on the Aging
 P.O. Box 7988
 San Francisco, CA 94120-7988
 (415) 355-3551
Paulo.Salta@sfgov.org

David Kashani
 Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120-7988
 (415) 355-3607
David.Kashani@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to

the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.

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

	A	B	C	D	E
1	Appendix B1, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4					
5	Name		Term		
6	Centro Latino de San Francisco		7/1/18-6/30/20		
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Naturalization				
10	Budget Reference Page No.(s)				
11	Program Term		7/1/18-6/30/19	7/1/19-6/30/20	Total
12	Expenditures				
13	Salaries & Benefits	\$79,285	\$76,785	\$156,070	
14	Operating Expenses	\$8,495	\$10,995	\$19,490	
15	Subtotal	\$87,780	\$87,780	\$175,560	
16	Indirect Percentage (%)	0%	0%	0%	
17	Indirect Cost (Line 16 X Line 15)	\$0	\$0	\$0	
18	Capital/Subcontractor Expenditures	\$27,723	\$27,723	\$55,446	
19	Total Expenditures	\$115,503	\$115,503	\$231,006	
20	HSA Revenues				
21					
22	General Fund	\$115,503	\$115,503	\$231,006	
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$115,503	\$115,503	\$231,006	
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$115,503	\$115,503	\$115,503	
37	Full Time Equivalent (FTE)				
39	Prepared by: G.Bonilla		Telephone No.:		Date: 05/15/19
40	HSA-CO Review Signature: _____				
41	HSA #1				05/15.2019

	A	B	C	D	E	F	G	H	I
1	Appendix B1, Page 3								
2									
3									
4	Program: Naturalization								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11	TOTAL								
12	<u>Expenditure Category</u>		TERM	<u>7/1/18-6/30/19</u>		<u>7/1/19-6/30/20</u>		<u>7/1/18-6/30/20</u>	
13	Rental of Property								
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$3,890		\$5,690		\$9,580	
15	Office Supplies, Postage			\$2,543		\$2,543		\$5,086	
16	Building Maintenance Supplies and Repair								
17	Printing and Reproduction			\$562		\$902		\$1,464	
18	Insurance			\$500		\$860		\$1,360	
19	Staff Training								
20	Staff Travel-(Local & Out of Town)								
21	Rental of Equipment								
22									
23	CONSULTANTS								
24	Audit Fees			\$1,000		\$1,000		\$2,000	
25									
26									
27	OTHER								
28									
29									
30									
31	TOTAL OPERATING EXPENSE			\$8,495		\$10,995		\$19,490	
32									
33	HSA #3								05/15.2019

	A	B	C	D	E
1	Appendix B1, Page 4				
2					
3					
4	Program: Naturalization				
5	(Same as Line 9 on HSA #1)				
6	Program Expenditure Detail				
7	SUBCONTRACTORS		7/1/18-6/30/19	7/1/19-6/30/20	Total
8		Mission Neighborhood Center	\$27,723	\$27,723	\$55,446
9					\$0
10					\$0
11	TOTAL SUBCONTRACTOR COST		\$27,723	\$27,723	\$55,446
12					
13	EQUIPMENT		7/1/18-6/30/19	7/1/19-6/30/20	7/1/18-6/30/20
14	No.	ITEM/DESCRIPTION			
15					\$0
16					\$0
17					\$0
18	TOTAL EQUIPMENT COST		\$0	\$0	\$0
19					
20	R E M O D E L I N G				
21	Description:		7/1/18-6/30/19	7/1/19-6/30/20	7/1/18-6/30/20
22					\$0
23					\$0
24					\$0
25	TOTAL REMODELING COST		\$0	\$0	\$0
26					
27	TOTAL CAPITAL/SUBCONTRACTOR EXPENDITURE		\$27,723	\$27,723	\$55,446
28					
29	HSA #4				05/15.2019

AGENCY: Centro Latino de San Francisco, Inc

FISCAL YEAR: 2019-2020

CONTRACT MAILING ADDRESS: 1656 15th Street San Francisco, Ca 04103

DIRECTOR: Gloria Bonilla

PHONE NO.: 415-286-0883

SITES: (Naturalization)	Centro Latino de San Francisco				
Name of Site	Los Mayores				
Address and Zip	1656 15 th Street SF 94103				
Phone Number	415-286-0883				
Fax Number	415-861-8782				
Neighborhood	Mission District				
Muni Line #s	14L, 22, 33, 47, 49 and 71				
Person in Charge	Gloria Bonilla				
Site Manager	Maria Eugenia Sarti/ Page Schaefer				
Programs Offered at Site	Congregate, Home Delivered Meals, Community Services and Naturalization				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00a.m.-4:00p.M-Sat. 5:30p.m.-7:00p.m Mon &Wed.				
Hours of scheduled programming	9:30a.m. 11:00a.m.m. M-S Mon. and Wed. 5:30p.m.- 7:00p.m.				
Hours of meal service	11:30a.m.-1:00p.m.				
Annual number of meals at site	33,560 Los Mayores Site Only				
Average number of meals per day	99				
Total number of service days in FY	304				
Days closed	New Year, President's Day, Cesar Chavez, Memorial, Independence, Labor, Veteran's, Day After Thanksgiving and Christmas				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A1 – SERVICES TO BE PROVIDED

INTERNATIONAL INSTITUTE OF THE BAY AREA

NATURALIZATION SERVICES

Effective July 1, 2019 to June 30, 2020

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with a Disability	Person 18-59 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 units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, 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.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	International Institute of the Bay Area
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OOA	Office on the Aging
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

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

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

- Member of LGBTQ+ Community

IV. Location and Time of Services

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

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve **280** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.

- Grantee will serve 80 unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide 140 units of service of Citizenship/ESL class hours.
- Grantee will provide 450 units of service of One-to-One Assistance hours.
- Grantee will provide 480 units of service of Legal Services hours.
- At least 75% of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose Citizenship/ESL classes started in a previous year.*

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by Grantee and provided during the annual program monitoring process:

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided. They shall be collected by Grantee and provided during the annual program monitoring process:

- Quantity of clients completing the naturalization process (becoming Citizens) during the contract year.

VIII. Reporting and Other Requirements

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

- A. The 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.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.

- D. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- G. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Paulo Salta
 Program Analyst
 DAAS, Office on the Aging
 P.O. Box 7988
 San Francisco, CA 94120-7988
 (415) 355-3551
Paulo.Salta@sfgov.org

David Kashani
 Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120-7988
 (415) 355-3607
David.Kashani@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.

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

	A	B	C	D	E
1	Appendix B1, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4					
5	Name	Term			
6	International Institute of the Bay Area	7/1/18-6/30/20			
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Naturalization				
10	Budget Reference Page No.(s)				
11	Program Term	7/1/18-6/30/19	7/1/19-6/30/20	Total	
12	Expenditures				
13	Salaries & Benefits	\$110,034	\$110,034	\$220,068	
14	Operating Expenses	\$52,157	\$52,157	\$104,314	
15	Subtotal	\$162,191	\$162,191	\$324,382	
16	Indirect Percentage (%)	14%	14%	14%	
17	Indirect Cost (Line 16 X Line 15)	\$23,007	\$23,007	\$46,014	
18	Capital/Subcontractor Expenditures	\$0	\$0	\$0	
19	Total Expenditures	\$185,198	\$185,198	\$370,396	
20	HSA Revenues				
21					
22	General Fund	\$185,198	\$185,198	\$370,396	
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$185,198	\$185,198	\$370,396	
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$185,198	\$185,198	\$185,198	
37	Full Time Equivalent (FTE)				
39	Prepared by:	Telephone No.:	Date: 05/06/19		
40	HSA-CO Review Signature:				
41	HSA #1			10/25/2016	

	A	B	C	D	E	F	G	H	I
1	Appendix B1, Page 3								
2									
3									
4	Program: Naturalization								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11									
12	<u>Expenditure Category</u>		<u>TERM</u>		<u>7/1/18-6/30/19</u>		<u>7/1/19-6/30/20</u>		<u>TOTAL</u> <u>7/1/18-6/30/20</u>
13	Rental of Property				\$39,628		\$39,628		\$79,256
14	Utilities (Elec., Water, Gas, Phone, Scavenger)				\$2,702		\$302		\$3,005
15	Office Supplies, Postage				\$3,054		\$3,054		\$6,108
16	Building Maintenance, Janitor, Supplies and Repair						\$2,400		\$2,400
17	Equipment Lease & Maintenance				\$900		\$900		\$1,800
18	Insurance				\$1,400		\$1,400		\$2,800
19	Communication				\$2,800		\$2,800		\$5,600
20	Staff Training				\$60		\$60		\$120
21	Staff Travel				\$263		\$263		\$525
22									
23	CONSULTANTS								
24									
25									
26	OTHER								
27	Abacus Fees				\$1,350		\$1,350		\$2,700
28									
29									
30	TOTAL OPERATING EXPENSE				\$52,157		\$52,157		\$104,314
31									
32	HSA #3								10/25/2016

AGENCY: International Institute of the Bay Area (IIBA)

FISCAL YEAR: 2018-19

CONTRACT MAILING ADDRESS: 1111 Market Street, 4th Floor, San Francisco, CA 94103

DIRECTOR: Ellen Dumresnil

PHONE NO.: 415-538-8110

SITES: (Naturalization)	Main office of the International Institute of the Bay Area (IIBA)		201 Turk St Apartments					
Name of Site	1111 Market Street, 4 th Floor, San Francisco, CA 94103		201 Turk St. Ground Floor, San Francisco, CA 94102					
Address and Zip	1111 Market Street, 4 th Floor, San Francisco, CA 94103		201 Turk St. Ground Floor, San Francisco, CA 94102					
Phone Number	415-538-8100							
Fax Number	415-538-8111							
Neighborhood	Tenderloin		Tenderloin					
Muni Line #s	Next to Civic Center BART and Muni station		Next to Civic Center BART and Muni station					
Person in Charge	Ellen Dumresnil		(Contact IIBA)					
Site Manager	"		"					
Programs Offered at Site	Immigration Legal Services & Citizenship Classes		Citizenship Classes					
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun		<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun		<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun		<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	
Hours Open	9:00am to 5:00pm		12:30 pm to 2:00 pm					
Hours of scheduled programming	Citizenship classes on Tuesdays from 4:00 to 5:30pm		12:30 pm to 2:00 pm					
Hours of meal service	N/A		N/A					
Annual number of meals at site	N/A		N/A					
Average number of meals per day	N/A		N/A					
Days closed	Major U.S. holidays		Major U.S. holidays					
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No	

APPENDIX A1 – SERVICES TO BE PROVIDED

JEWISH FAMILY AND CHILDREN'S SERVICES

NATURALIZATION SERVICES

Effective July 1, 2019 to June 30, 2020

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with a Disability	Person 18-59 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 units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, 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.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Jewish Family and Children's Services
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OOA	Office on the Aging
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

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

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

- Member of LGBTQ+ Community

IV. Location and Time of Services

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

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve 54 unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.

- Grantee will serve 52 unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide 118 units of service of Citizenship/ESL class hours.
- Grantee will provide N/A units of service of One-to-One Assistance hours.
- Grantee will provide 960 units of service of Legal Services hours.
- At least 75% of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose Citizenship/ESL classes started in a previous year.*

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by Grantee and provided during the annual program monitoring process:

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided. They shall be collected by Grantee and provided during the annual program monitoring process:

- Quantity of clients completing the naturalization process (becoming Citizens) during the contract year.

VIII. Reporting and Other Requirements

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

- A. The 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.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.

- D. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- G. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Paulo Salta
Director, Office on the Aging
DAAS
P.O. Box 7988
San Francisco, CA 94120-7988
Paulo.Salta@sfgov.org

David Kashani
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
David.Kashani@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.

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

	A	B	C	D	E
1	Appendix B1, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4					
5	Name	Term			
6	Jewish Family and Children's Services	7/1/18-6/30/20			
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>				
8	If modification, Effective Date of Mod.	No. of Mod.			
9	Program: Naturalization				
10	Budget Reference Page No.(s)				
11	Program Term	7/1/18-6/30/19	7/1/19-6/30/20	Total	
12	Expenditures				
13	Salaries & Benefits	\$65,301	\$65,301	\$130,602	
14	Operating Expenses	\$7,684	\$7,684	\$15,368	
15	Subtotal	\$72,985	\$72,985	\$145,970	
16	Indirect Percentage (%)	11%	11%	11%	
17	Indirect Cost (Line 16 X Line 15)	\$8,240	\$8,240	\$16,480	
18	Capital/Subcontractor Expenditures	\$0	\$0	\$0	
19	Total Expenditures	\$81,225	\$81,225	\$162,450	
20	HSA Revenues				
21					
22	General Fund	\$81,225	\$81,225	\$162,450	
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$81,225	\$81,225	\$162,450	
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$81,225	\$81,225	\$81,225	
37	Full Time Equivalent (FTE)				
39	Prepared by:	Telephone No.:	Date: 05/06/19		
40	HSA-CO Review Signature:				
41	HSA #1				10/25/2016

	A	B	C	D	E	F	G	H	I
1	Appendix B1, Page								3
2									
3									
4	Program: Naturalization								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11									
12	<u>Expenditure Category</u>		<u>TERM</u>	<u>7/1/18-6/30/19</u>	<u>7/1/19-6/30/20</u>		<u>TOTAL</u>	<u>7/1/18-6/30/20</u>	
13	Rental of Property								
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$1,053	\$1,053		\$2,106		
15	Office Supplies, Postage			\$458	\$458		\$916		
16	Building Maintenance Supplies and Repair			\$1,587	\$1,587		\$3,174		
17	Printing and Reproduction								
18	Insurance			\$2,071	\$2,071		\$4,142		
19	Staff Training								
20	Staff Travel-(Local & Out of Town)			\$1,077	\$1,077		\$2,154		
21	Rental of Equipment								
22									
23	CONSULTANTS								
24									
25									
26	OTHER								
27	INS Zoom Software Licensing Fee			\$360	\$360		\$720		
28	State Bar/AILA License, Conference, Dues,			\$1,078	\$1,078		\$2,156		
29									
30	TOTAL OPERATING EXPENSE			\$7,684	\$7,684		\$15,368		
31									
32	HSA #3								10/25/2016

APPENDIX F - SITE CHART
HSA / DAAS / OFFICE ON THE AGING

AGENCY: Jewish Family and Children's Services (JFCS)

FISCAL YEAR: 2019-20

CONTRACT MAILING ADDRESS: 2150 Post St. San Francisco, CA 94115

DIRECTOR: Anita Friedman

PHONE NO.: 415-449-1200

SITES: (Naturalization) Name of Site	2534 Judah Street Office	Main office of Jewish Family and Children's Services (JFCS)			
Address and Zip	2534 Judah Street, San Francisco, CA 94122	2150 Post St. San Francisco, CA 94115			
Phone Number	415-449-2917	415-449-1200			
Fax Number	844-589-6699	N/A			
Neighborhood	Outer Sunset	Lower Pacific Heights			
Muni Line #s	MUNI N-Judah	MUNI lines: 38, 24			
Person in Charge	Brett Snider	Traci Dobronravova			
Site Manager	Brett Snider	Traci Dobronravova			
Programs Offered at Site	Immigration Legal Services	Citizenship Classes			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00am to 5:00pm	6:30 pm to 8:00 pm			
Hours of scheduled programming	No scheduled programs, clients by appointment only	Citizenship classes on Mondays from 6:30 to 8:00pm			
Hours of meal service	N/A	N/A			
Annual number of meals at site	N/A	N/A			
Average number of meals per day	N/A	N/A			
Days closed	Major U.S. holidays	Major U.S. holidays			
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A1 – SERVICES TO BE PROVIDED

La Raza Centro Legal

NATURALIZATION SERVICES

Effective July 1, 2019 to June 30, 2020

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with a Disability	Person 18-59 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 units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, 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.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	La Raza Centro Legal
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OOA	Office on the Aging
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

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

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

- Member of LGBTQ+ Community

IV. Location and Time of Services

Services are provided at La Raza Centro Legal offices, located at 474 Valencia St., Suite 295, San Francisco, CA 94103. The hours of operation Monday through Friday during regular business hours.

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve 13 unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.
- Grantee will provide 260 units of service of Legal Services hours.
- At least 75% of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose Citizenship/ESL classes started in a previous year.*

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by Grantee and provided during the annual program monitoring process:

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided. They shall be collected by Grantee and provided during the annual program monitoring process:

- Quantity of clients completing the naturalization process (becoming Citizens) during the contract year.

VIII. Reporting and Other Requirements

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

- A. The 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.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.

- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- D. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- G. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Michael Zaugg
Director, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120-7988
Michael.Zaugg@sfgov.org

and

Tahir Shaikh
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
Tahir.Shaikh@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to

the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.

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

	A	B	C	D	E
1	Appendix B1, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4					
5	Name		Term		
6	La Raza Centro Legal		7/1/18-6/30/20		
7	(Check One) New Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Naturalization				
10	Budget Reference Page No.(s)				
11	Program Term		7/1/18-6/30/19	7/1/19-6/30/20	Total
12	Expenditures				
13	Salaries & Benefits	\$31,159	\$33,171	\$64,330	
14	Operating Expenses	\$7,290	\$7,339	\$14,629	
15	Subtotal	\$38,449	\$40,510	\$78,959	
16	Indirect Percentage (%)	13%	7.4%	10.23%	
17	Indirect Cost (Line 16 X Line 15)	\$5,070	\$3,009	\$8,079	
18	Capital/Subcontractor Expenditures	\$0	\$0	\$0	
19	Total Expenditures	\$43,519	\$43,519	\$87,038	
20	HSA Revenues				
21					
22	General Fund	\$43,519	\$43,519	\$87,038	
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$43,519	\$43,519	\$87,038	
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$43,519	\$43,519	\$87,038	
37	Full Time Equivalent (FTE)				
39	Prepared by: Jessica Garcia	Telephone No.: 415-553-3407		Date: 05/16/2018	
40	HSA-CO Review Signature: _____				
41	HSA #1				10/25/2016

	A	B	C	D	E	F	G	H
1	Appendix B1, Page 2							
2								
3								
4	Program: Naturalization							
5	(Same as Line 9 on HSA #1)							
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11					7/1/18-6/30/19	7/1/19-6/30/20	7/1/18-6/30/20	
		Agency Totals		HSA Program		DAAS		TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	Executive Director	\$80,000	1.00	1%	0.01		\$800	\$800
14	Immigration Law Coordinator	\$57,800	1.00	10%	0.10	\$5,000	\$5,491	\$10,491
15	Immigration Attorney	\$55,500	1.00	20%	0.20	\$9,359	\$10,725	\$20,084
16	Immigration Paralegal	\$42,241	1.00	15%	0.15	\$6,407	\$6,129	\$12,536
17	Administrative Assistant II / Immigration Support	\$49,000	1.00	6%	0.06	\$2,839	\$2,450	\$5,289
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30								
31	TOTALS	\$284,541	4.00	51%	0.51	\$23,605	\$25,595	\$49,200
32								
33	FRINGE BENEFIT RATE	30.75%						
34	EMPLOYEE FRINGE BENEFITS	\$87,496				\$7,554	\$7,576	\$15,130
35								
36								
37	TOTAL SALARIES & BENEFITS	\$372,037				\$31,159	\$33,171	\$64,330
38	HSA #2							10/25/2016

	A	B	C	D	E	F	G	H
1	Appendix B1, Page 3							
2								
3								
4	Program: Naturalization							
5	(Same as Line 9 on HSA #1)							
6								
7	Operating Expense Detail							
8								
9								
10								
11								
12	Expenditure Category		TERM	7/1/18-6/30/19		7/1/19-6/30/20		TOTAL 7/1/18-6/30/20
13	Rental of Property			\$2,277		\$2,131		\$2,277
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$120		\$113		\$120
15	Office Supplies, Postage			\$224		\$210		\$224
16	Building Maintenance Supplies and Repair							
17	Printing and Reproduction			\$110		\$102		\$110
18	Insurance			\$1,359		\$1,271		\$1,359
19	Staff Training			\$68		\$64		\$68
20	Staff Travel-(Local & Out of Town)			\$55		\$51		\$55
21	Rental of Equipment			\$1,265		\$1,076		\$1,265
22								
23	CONSULTANTS							
24	Finance Consultant			\$438		\$1,281		\$438
25	Computer Consultant			\$548		\$102		\$548
26	Janitorial Service			\$197		\$184		\$197
27	Auditor			\$502		\$598		\$502
28								
29	OTHER							
30	Bar Dues			\$98		\$129		\$98
31	AILA (American Immigration Lawyers Association)			\$29		\$27		\$29
32								
33	TOTAL OPERATING EXPENSE			\$7,290		\$7,339		\$14,629
34								
35	HSA #3							10/25/2016

APPENDIX A1 – SERVICES TO BE PROVIDED

SELF-HELP FOR THE ELDERLY

NATURALIZATION SERVICES

Effective July 1, 2019 to June 30, 2020

I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, public benefits, immigration law, and bilingual education with an emphasis on aiding their path to citizenship.

II. Definitions

Adult with a Disability	Person 18-59 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 units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, 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.
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Self-Help for the Elderly
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

N-400	Application for Naturalization. This is the form used to apply for U.S. Citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OOA	Office on the Aging
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

III. Client Eligibility / Target Population

To be eligible for Naturalization Services, individuals must be a resident of San Francisco *and* either 1) 60 years of age or older *or* 2) between 18 and 59 years of age and living with a disability.

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

- Low-income
- Non or limited –English speaking

- Minority
- Frail
- Member of LGBTQ+ Community

IV. Location and Time of Services

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

V. Description of Services

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – students attending classes will concurrently work on their English proficiency and study basic United States history, government, and civics for the purpose of successfully passing the Citizenship test administered by USCIS.
2. One-to-One Assistance – individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Actual assistance includes preparing the N-400, explaining or clarifying the process, and checking on the status of pending applications. It also includes assisting with applying for language and/or disability waiver (N-648) so older adults or adults with disabilities can be accommodated. One-to-One Assistance is distinguished from Legal Services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – services may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Clients can expect that Grantee is experienced and knowledgeable about the Naturalization process; Grantee is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

Grantee agrees to meet on a quarterly basis or as needed with other naturalization service providers and the Office on the Aging to help develop and maintain a comprehensive citywide approach to naturalization service issues.

VI. Service Objectives

On an annual basis:

- Grantee will serve **560** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving One-to-One Assistance or Legal Services.

- Grantee will serve 560 unduplicated consumers who will attend Citizenship/English as a Second Language (ESL) Classes.
- Grantee will provide 2000 units of service of Citizenship/ESL class hours.
- Grantee will provide 1600 units of service of One-to-One Assistance hours.
- Grantee will provide N/A units of service of Legal Services hours. (Agency primarily provides one-to-one assistance for this program)
- At least 75% of unduplicated consumers enrolled during the contract year will file an N-400 or have an N-400 pending. *This may include clients whose Citizenship/ESL classes started in a previous year.*

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by Grantee and provided during the annual program monitoring process:

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.

VII. Outcome Objectives

The following Outcome Objectives will be used to measure the amount, range, and impact of services provided. They shall be collected by Grantee and provided during the annual program monitoring process:

- Quantity of clients completing the naturalization process (becoming Citizens) during the contract year.

VIII. Reporting and Other Requirements

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

- A. The 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.
- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAAS/OOA and Contracts Department staff.

- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- D. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- E. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAAS/HSA. The due date for submitting the annual summary report is July 10th.
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAAS/OOA.
- G. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Paulo Salta
 Program Analyst
 DAAS, Office on the Aging
 P.O. Box 7988
 San Francisco, CA 94120-7988
 (415) 355-3551
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David Kashani
 Contract Manager
 Human Services Agency
 PO Box 7988
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 (415) 355-3607
David.Kashani@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project

income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII.

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

	A	B	C	D	E
1	Appendix B1, Page 1				
2	HUMAN SERVICES AGENCY BUDGET SUMMARY				
3					
4					
5	Name	Term			
6	SELF-HELP FOR THE ELDERLY	7/1/18-6/30/20			
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Naturalization				
10	Budget Reference Page No.(s)				
11	Program Term	7/1/18-6/30/19	7/1/19-6/30/20	Total	
12	Expenditures				
13	Salaries & Benefits	\$128,847	\$128,847	\$257,694	
14	Operating Expenses	\$21,411	\$21,411	\$42,822	
15	Subtotal	\$150,258	\$150,258	\$300,516	
16	Indirect Percentage (%)	13%	13%	13%	
17	Indirect Cost (Line 16 X Line 15)	\$19,759	\$19,759	\$39,518	
18	Capital/Subcontractor Expenditures	\$0	\$0	\$0	
19	Total Expenditures	\$170,017	\$170,017	\$340,034	
20	HSA Revenues				
21					
22	General Fund	\$170,017	\$170,017	\$340,034	
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$170,017	\$170,017	\$340,034	
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$170,017	\$170,017	\$340,034	
37	Full Time Equivalent (FTE)				
39	Prepared by:	Telephone No.:	Date: 05/06/19		
40	HSA-CO Review Signature:	_____			
41	HSA #1				10/25/2016

	A	B	C	D	E	F	G	H	I
1	Appendix B1, Page 3								
2									
3									
4	Program: Naturalization								
5	(Same as Line 9 on HSA #1)								
6									
7	Operating Expense Detail								
8									
9									
10									
11									
12	<u>Expenditure Category</u>		TERM		7/1/18-6/30/19		7/1/19-6/30/20		TOTAL 7/1/18-6/30/20
13	Rental of Property				\$8,907		\$8,907		\$17,814
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$2,310		\$2,310		\$4,620
15	Office Supplies, Postage				\$1,721		\$1,721		\$3,442
16	Building Maintenance Supplies and Repair				\$5,132		\$5,132		\$10,264
17	Printing and Reproduction								
18	Insurance				\$945		\$945		\$1,890
19	Staff Training				\$1,200		\$1,200		\$2,400
20	Staff Travel-(Local & Out of Town)				\$800		\$800		\$1,600
21	Rental of Equipment								
22									
23	CONSULTANTS								
24									
25									
26	OTHER								
27	Software (Windows 10)				\$396		\$396		\$792
28									
29									
30	TOTAL OPERATING EXPENSE				\$21,411		\$21,411		\$42,822
31									
32	HSA #3								10/25/2016

