



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

Office of Early Care  
and Education

P.O. Box 7988  
San Francisco, CA  
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[www.SFHSA.org](http://www.SFHSA.org)



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

## MEMORANDUM

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** KELLY DEARMAN, EXECUTIVE DIRECTOR

**FROM:** CINDY KAUFFMAN, DEPUTY DIRECTOR  
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

**DATE:** SEPTEMBER 7, 2022

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

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	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
<b>GRANT TERM:</b>	10/01/20- 06/30/24	7/01/22- 6/30/23	10/01/20- 06/30/24		
<b>GRANT AMOUNT:</b>	\$3,438,972	\$160,000	\$3,598,972	\$359,900	\$3,958,872
<b>ANNUAL AMOUNT:</b>	<u>FY 20/21</u>	<u>FY 21/22</u>	<u>FY 22/23</u>	<u>FY 23/24</u>	
	\$895,567	\$871,313	\$996,046	\$836,046	
<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$1,619,537		\$1,979,435	\$359,900	\$3,958,872
<b>PERCENTAGE:</b>	45%	%	55%		100%

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant with Family Caregiver Alliance (FCA) for the period of July 1, 2022 through June 30, 2023, in the additional amount of \$160,000 plus a 10% contingency for a revised total amount not to exceed \$3,958,872. This onetime allocation is combination of year 1 funds not requested by the awarded grantee of the Caregiver Support- Temporary Respite grant and Dignity Fund savings. This funding will cover new respite requests and new caregiver services

requested prior to the execution of the Caregiver Support- Temporary Respite grant. The additional services and respite provided will maintain the respite intention of the funds and will allow the new grantee of the Temporary Respite grant the time to initiate and ramp up their program.

### **Background**

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

DAS is committed to addressing identified needs in the Dignity Fund Community Needs Assessment. Caregiver support services are a need for those individuals caring for older adults and adults with disabilities. Caregiver support providing enhanced respite care has been identified and continues to be a need. This modification increases opportunity to expand services to caregivers.

Respite care provides caregivers with temporary in-home or out of home relief from caregiving responsibilities. Respite care is designed to help sustain caregiver health and well-being by giving them short-term breaks which is instrumental in enabling the care receiver to remain in the home and prevent or delay the need for a higher level of care.

### **Services to be Provided**

Under this modification, the grantee will provide above and beyond their current grant:

- Additional 2,000 hours of in-home caregiver respite at times and locations throughout San Francisco.
- Additional 35 hours of caregiver counseling services. Depending on COVID health protocols and comfort level of the caregiver, these services may be in-person at the contracted or subcontracted agencies, via telephone, or hybrid.

- Additional one on one caregiver outreach to 30 caregiver contacts.

**Selection**

Grantee was selected through Request for Proposals #875, which was competitively bid in January 2020.

**Funding**

Funding for this grant is provided through a combination of Federal, State, and County General Funds.

**ATTACHMENTS**

Appendix A-1, Scope of Services

Appendix B-1, Budget

Appendix B-2, Cares Act FYE 2021

## APPENDIX A-1: SERVICES TO BE PROVIDED BY GRANTEE

### Family Caregiver Alliance

#### FAMILY CAREGIVER SUPPORT PROGRAM

July 1, 2020 thru June 30, 2024,

Modified September 1, 2022

#### I. Purpose:

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

#### II. Definitions:

CA Getcare	A web-based application developed for DAS staff and its service providers to maintain and track services provided and consumers served citywide. Minimum computer requirements to access the application includes Windows 2000, Internet Explorer 6.0, and Adobe Acrobat 5.0
Care Receiver –Older Adults	An older individual (60 years of age or older) or an individual (of any age) with Alzheimer's disease or related disorder with neurological and organic brain dysfunction. [Section 302(3) of the Older Americans Act]
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
Caregiver Support	Individual counseling, support groups, and/or caregiver training to caregivers to assist the caregiver in making decisions and solving problems relating to their care giving roles.
DAS	Department of Disability and Aging Services of the San Francisco Human Services Agency
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires

	substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Family Caregiver Alliance (FCA)
HSA	San Francisco Human Services Agency
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.
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.
OCP	Office of Community Partnerships, a unit within the Department of Disability and Aging Services of the San Francisco Human Services Agency.
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

### III. Target Population:

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

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

#### **IV. Eligibility for Services:**

Family caregivers of older adults must be:

- 18 years of age or older and
- provide care to those who live in their own homes, SRO hotels, or public or older adult housing within the boundaries of San Francisco County

Care receivers must be:

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

#### **V. Location and Time of Services:**

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

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

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

\*In order to provide a wide range of care giving services to a diverse population of San Francisco residents, Family Caregiver Alliance sub-contracts with three San Francisco-based non-profit organizations for service provision. These organizations are Kimochi, Self-Help for the Elderly, and Stepping Stone Adult Day Health. Below is a key to each agency's acronym as described throughout the service descriptions section:

- Family Caregiver Alliance: **FCA**
- Kimochi, Inc.: **KI**
- Self-Help for the Elderly: **SHE**
- SteppingStone: **SS**

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

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

- **Public Information on Caregiving** (Caring for Elderly) is an Information Service designed to provide information about available FCSP and other caregiver support resources and services by disseminating publications, conducting media campaigns, and maintaining

electronic information systems. **UNIT: 15 FCA//2 SHE//4 SS = 21 activities related to public information**

- Community Education on Caregiving (Caring for Elderly) is an Information Service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services. **UNIT: 20 FCA = 20 educational activities**

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

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

- Caregiver Outreach (Caring for Elderly) is an Access Assistance service involving interventions (one-on-one contacts with individuals) initiated by an agency or provider for the purpose of identifying caregivers and encouraging their use of existing caregiver support services. **UNIT: 50 FCA//125 SHE = 175 contacts**
- Caregiver Information and Assistance (Caring for Elderly) is an Access Assistance service that: (A) provides caregivers with information on services available within the communities, including information related to assistive technology and caring for older individuals at risk of institutional placement; (B) links caregivers to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures (caregiver may remain anonymous & refuse follow-up contact). **UNIT: 182 FCA// 110 SHE = 292 contacts**
- Caregiver Interpretation/Translation (Caring for Elderly) is an Access Assistance service for the provision of bilingual communication assistance to a caregiver in order to access assistance and receive support for their caregiving responsibilities. **UNIT: 20 FCA//200 KI// 75 SHE = 295 contacts**
- Caregiver Legal Resources (Caring for Elderly) is an FCSP Access Assistance service involving one-to-one guidance provided by an attorney (or person under the supervision of an attorney) in the use of legal resources and services when assisting a caregiver with caregiving related legal issues. **UNIT: 15 FCA = 15 contacts**

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

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

- Caregiver Assessment (Caring for Elderly) An FCSP Support Service conducted by persons trained and experienced in the skills required to deliver the service that should result in a plan that includes emergency back-up provisions and is periodically updated;

and will explore options and courses of action for caregivers by identifying their (A) willingness to provide care; (B) duration and care frequency preferences; (C) caregiving abilities; (D) physical health, psychological, social support, and training needs; (E) financial resources relative for caregiving; and (F) strengths and weaknesses within the immediate caregiving environment and (caregiver's) extended informal support system.  
**UNIT: 340 FCA// 125 SHE//12 SS = 477 hours**

- Caregiver Counseling (Caring for Elderly) An FCSP Support Service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of support needed for stress, depression, and loss as a result of caregiving responsibilities. This service (A) may involve their informal support system; (B) may be individual direct sessions and/or telephone consultations, and (C) may address caregiving related financial and long-term care placement responsibilities.  
**UNIT: 260 FCA//360 KI//100 SHE //80 SS = 800 hours**
- Caregiver Peer Counseling (Caring for Elderly) is a Support Service provided by experienced volunteers on the condition that appropriate training and qualified supervision protocols are in place.
- Caregiver Support Group (Caring for Elderly) An FCSP Support Service provided to a group of 3-12 caregivers that is led by a competent facilitator; conducted at least monthly within a supportive setting or via a controlled access, moderated online or teleconference approach; for the purpose of sharing experiences and ideas to ease the stress of caregiving and to improve decision making and problem solving related to their caregiving responsibilities. **UNIT: 210 FCA//50 KI//45 SS = 285 hours**
- Caregiver Training (Caring for Elderly) An FCSP Support Service consisting of workshops or one-on-one individually tailored sessions, conducted either in person or electronically by a skilled and knowledgeable individual, to assist caregivers in developing the skills and gaining the knowledge necessary to fulfill their caregiving responsibilities; and address the areas of health, nutrition, and financial literacy. **UNIT: 100 FCA//50 KI//75 SHE = 225 hours**
- Caregiver Case Management (Caring for Elderly) An FCSP Support Service provided by a person who is trained and experienced in the skills that are required to coordinate and monitor the provision of formal caregiver-related services in circumstances where caregivers are experiencing diminishing capacities due to mental impairment or temporary severe stress and/or depression. **UNIT: 50 FCA // 110 SHE = 160 hours**

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

Respite Care is a brief period of relief or rest from caregiving responsibilities, and is provided to caregivers on an intermittent, occasional, and/or emergency basis in a manner that responds to the individual needs and preferences of the caregivers and their care receiver rather than a pre-established set amount offered on a “first come, first served” waiting list basis. Respite Care shall be provided only to a caregiver of a care receiver



having two or more activities of daily living limitations or a cognitive impairment, or to a caregiver who is the grandparent or older adult relative caring for a child. Examples of temporary respite care:

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

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

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

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

- Caregiver Respite In-Home Supervision (Caring for Elderly) An FCSP Respite Care service that includes the provision of care receiver day and/or overnight supervision and friendly visiting by an appropriately skilled provider or volunteer in order to prevent wandering and health or safety incidents. UNIT OF MEASURE: 1 hour
- Caregiver Respite Homemaker Assistance (Caring for Elderly) An FCSP Respite Care service that includes the provision of care receiver assistance with meal preparation, medication management, using the phone, and or light housework (along with care receiver supervision) by an appropriately skilled provider or volunteer. UNIT OF MEASURE: 1 hour
- Caregiver Respite In-Home Personal Care (Caring for Elderly) An FCSP Respite Care service that includes the provision of care receiver assistance with eating, bathing, toileting, transferring, and/or dressing (along with care receiver supervision and related homemaker assistance) by an appropriately skilled provider. **UNIT OF MEASURE: FCA= 2960 hours**
- Caregiver Respite Home Chore (Caring for Elderly) An FCSP Respite Care service that includes an appropriately skilled provider or volunteer assisting a caregiver with heavy housework, yard work, and/or sidewalk and other routine home maintenance (but not structural repairs) associated with caregiving responsibilities. UNIT: 1 hour
- Caregiver Respite Out-of-Home Day Care (Caring for Elderly) An FCSP Respite Care service where the care receiver attends a supervised/protective, congregate setting during some portion of a day, and includes access to social and recreational activities. UNIT OF MEASURE: 1 hour
- Caregiver Respite Out-of-Home Overnight (Caring for Elderly) An FCSP Respite Care service where the care receiver is temporarily placed in a supervised/protective, residential setting for one or more nights, and may include access to nursing and personal care. UNIT OF MEASURE: 1 hour

### Supplemental Services (Caring For Elderly)

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

- Assistive Devices for Caregiving (Caring for Elderly) An FCSP Supplemental Service involving the purchase, rental and/or service fee of any equipment or product system (ranging from a lift chair or bathtub transfer bench to an electronic pill dispenser or emergency alert fall prevention device) in order to facilitate and fulfill caregiving responsibilities. **UNIT: 5 SHE = 5 occurrences**
- Home Adaptations for Caregiving (Caring for Elderly) An FCSP Supplemental Service that makes any minor or major physical change to the home (ranging from installation of grab bars or replacement of door handles to construction of an entrance ramp or roll-in shower) in order to fulfill caregiving responsibilities. UNIT: 1 modification is 1 occurrence
- Caregiving Services Registry (Caring for Elderly) An FCSP Supplemental Service that recruits, screens, and maintains a listing of dependable, qualified self-employed homemaker or respite care workers who may be matched with caregivers willing to utilize personal resources to pay for assistance with their caregiving responsibilities. Both the caregiver and self-employed worker will be: (A) advised about appropriate compensation and workplace performance expectations; and (B) provided with follow-up to ensure the match is functioning effectively. **UNIT: 75 KI = 75 occurrences**
- Caregiving Emergency Cash/Material Aid (Caring for Elderly) An FCSP Supplemental Service that arranges for and provides assistance to caregivers in the form of commodities, surplus food, emergency cash, transit passes, meals, and vouchers that will help meet identified needs associated with an individual caregiver's responsibilities. Unit definition: one assistance for one caregiver equals one occurrence. **UNIT: FCA 10 = 10 occurrences**

#### **VII. Outcome Objectives:**

1. At least 75% of program participants responding to the annual consumer satisfaction survey will indicate that they received the services offered by the agency and the services were appropriate, relevant, and adequate.
2. At least 75% of program participants responding to the annual consumer satisfaction survey will report reduced stress and an increased sense of feeling cared about/valued since receiving program services.

3. At least 75% of program participants responding to the annual consumer satisfaction survey will indicate they learned of new services related to caregiving that they were not previously aware of.
4. At least 85% of program participants report they are satisfied with the respite care services provided.

Note: The survey will have a return rate of at least thirty-five percent (35%) of caregiver participants responding to the annual consumer satisfaction survey.

### **VIII. Reporting Requirements:**

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

- A. Grantee will enter into CA-GetCare all the units of service in the Service Recording Tool and data for client-level service reporting by the 5<sup>th</sup> working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Billing and Reporting Online (CARBON) system for each unit of service delivered during the reporting period for each service listed in Section VI of the Services to be provided.
- C. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- D. Grantee will provide annual consumer satisfaction survey results to OCP by March 15 each grant year, with at least thirty-five percent (35%) of caregiver participants responding to the annual consumer satisfaction survey.
- E. Grantee will provide other reports as requested.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAS/HSA. The due date for submitting the annual summary report is July 10<sup>th</sup>.
- G. Grantee will assure that services delivered are consistent with professional standards for this service.
- H. Pursuant to California Department of Aging Requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.

- I. Grantee will develop a Grievance Policy consistent with Office of Community Partnerships Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults connect to services throughout the City. These Focal Points are:

<u>Designated Community Focal Point</u>	<u>Address</u>
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O’Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Resource Hub	2 Gough St, San Francisco, 94103

- K. Apart from the on-line reporting via CA GetCare and CARBON, and report requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Erica Maybaum, Program Analyst  
 DAS, OCP  
 PO Box 7988  
 San Francisco, CA 94120  
 E-mail address: erica.maybaum@sfgov.org

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

**IX. Monitoring Activities:**

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

	A	D	K	N	O	P	Q	R
1	Appendix B-1, Page 1							
2								
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>							
4								
5	Name							
6	<b>FAMILY CAREGIVER ALLIANCE</b>							
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>							
8	If modification, Effective Date of Mod. 9/1/2022 No. of Mod. 1							
9	<b>Program: Family Caregiver Support Program</b>							
10	Budget Reference Page No.(s)							
11	Program Term	Actual 10/1/20-6/30/21	Actual 7/1/21-6/30/22	Current 7/1/22-6/30/22	Modification	Revised 7/1/22-6/30/23	Current 7/1/23-6/30/24	Total Budget 10/1/20-6/30/24
12	<b>Expenditures</b>							
13	Salaries & Benefits	\$255,149	\$360,203	\$394,402	\$66,544	\$ 460,946	\$394,402	\$1,470,700
14	Operating Expenses	\$154,929	\$199,742	\$219,490	\$90,456	\$ 309,946	\$219,490	\$884,107
15	<b>Subtotal</b>	\$410,078	\$559,945	\$613,892	\$157,000	\$770,892	\$613,892	\$2,354,807
16	Indirect Percentage (%)	9%	9%	8%		7%	8%	9%
17	Indirect Cost (Line 16 X Line 15)	\$36,906	\$49,736	\$50,154	\$3,000	\$53,154	\$50,154	\$189,950
18	Capital/Subcontractor Expenditures	\$201,357	\$261,632	\$172,000		\$172,000	\$172,000	\$806,989
19	Total Expenditures	\$648,341	\$871,313	\$836,046	\$160,000	\$996,046	\$836,046	\$3,351,746
20	<b>HSA Revenues</b>							
21								
22	General Fund	\$278,787	\$353,006	\$390,151	\$160,000	\$550,151	\$390,151	\$1,572,095
23	CFDA 93.052	\$369,554	\$518,307	\$445,895		\$445,895	\$445,895	\$1,779,651
24								
25	<b>TOTAL HSA REVENUES</b>	\$648,341	\$871,313	\$836,046	\$160,000	\$996,046	\$836,046	\$3,351,746
26	<b>Other Revenues</b>							
27								
28								
29								
30								
31	Total Revenues	\$648,341	\$871,313	\$836,046	\$160,000	\$996,046	\$836,046	\$3,351,746
32	Full Time Equivalent (FTE)							
34	Prepared by: Stephen Hu	Telephone No.: 415-434-3388					Date: 9/7/2022	
35	HSA-CO Review Signature:							
36	<b>HSA #1</b>							

	A	B	C	D	G	J	M	N	O	P	Q	
1												
2	<b>Program: Family Caregiver Support Program</b>											
3	(Same as Line 9 on HSA #1)											
4												
5	Salaries & Benefits Detail											
6												
7												
8		HSA Program										
9	POSITION TITLE	Salary	Total FTE	New FTE	Actual 10/1/20-6/30/21	Actual 7/1/21-6/30/22	Current 7/1/22-6/30/22	Modification	Revised 7/1/22-6/30/23	Current 7/1/23-6/30/24	Total Budget 10/1/20-6/30/24	
10	Director of CRC Services	\$97,350	100%	0.17	\$11,700	\$16,500	\$19,600	\$4,219	\$23,819	\$19,600	\$71,619	
11	Family Consultant (Latino)	\$67,100	100%	0.18	\$11,040	\$12,000	\$12,100	\$3,000	\$15,100	\$12,100	\$50,240	
12	Family Consultant	\$69,300	100%	0.53	\$11,175	\$37,000	\$21,400	\$10,000	\$31,400	\$21,400	\$100,975	
13	Family Consultant	\$61,600	100%	0.39	\$16,013	\$24,000	\$23,850	\$10,000	\$33,850	\$23,850	\$97,713	
14	Family Consultant	\$63,800	100%	0.52	\$15,488	\$33,000	\$23,150	\$5,000	\$28,150	\$23,150	\$99,788	
15	Family Consultant	\$56,320	80%	0.01	\$105	\$500	\$1,340		\$1,340	\$1,340	\$3,285	
16	Family Consultant	\$70,400	100%	0.01	\$155	\$500	\$1,340		\$1,340	\$1,340	\$3,335	
17	Family Consultant	\$60,000	100%	-	\$945						\$945	
18	Family Consultant	\$60,000	100%	0.08		\$5,000	\$1,260		\$1,260	\$1,260	\$7,520	
19	Resource Outreach Coordinator (Intake)	\$49,345	100%	0.20	\$9,000	\$10,000	\$14,500	\$3,000	\$17,500	\$14,500	\$51,000	
20	Education Coord	\$48,000	100%	0.19	\$8,344	\$9,000	\$11,125	\$2,500	\$13,625	\$11,125	\$42,094	
21	Database/Fiscal Asst	\$48,000	100%	0.19	\$8,344	\$9,000	\$11,125	\$2,000	\$13,125	\$11,125	\$41,594	
22	Controller/Vouchered Svs	\$90,000	100%	0.21	\$12,128	\$19,000	\$18,670	\$500	\$19,170	\$18,670	\$68,968	
23	Prog Acct /Vouchered Svs	\$42,900	100%	0.37	\$14,603	\$16,000	\$19,470		\$19,470	\$19,470	\$69,543	
24	Operations Director	\$105,105	100%	0.10	\$11,229	\$10,000	\$18,000	\$1,000	\$19,000	\$18,000	\$58,229	
25	Reception/Adm Asst(Intake Reception)	\$45,000	100%	0.07	\$7,125	\$3,000	\$13,719	\$3,000	\$16,719	\$13,719	\$40,563	
26	Director of Communication	\$97,350	100%	0.21	\$17,176	\$20,000	\$25,168	\$2,500	\$27,668	\$25,168	\$90,012	
27	Community Outreach Specialist	\$60,000	100%	0.17	\$14,175	\$10,000	\$18,900	\$2,000	\$20,900	\$18,900	\$63,975	
28	Instructional Designer	\$71,500	100%	0.32	\$22,011	\$23,000	\$29,348		\$29,348	\$29,348	\$103,707	
29	Program & Policy Spec	\$60,375	100%	0.15		\$9,000					\$9,000	
30	Sr Program Mgr (Exec Dir)	\$154,000	100%	0.06	\$5,513	\$10,000	\$12,350	\$2,500	\$14,850	\$12,350	\$42,713	
31	TOTALS			4.12	\$196,269	\$276,500	\$296,415	\$51,219	\$347,634	\$296,415	\$1,116,818	
32												
33	FRINGE BENEFIT RATE				30%	30%			33%	33%	32%	
34	EMPLOYEE FRINGE BENEFITS				\$58,880	\$83,703	\$97,987	\$15,325	\$113,312	\$97,987	\$353,882	
35												
36												
37	TOTAL SALARIES & BENEFITS				\$255,149	\$360,203	\$394,402	\$66,544	\$460,946	\$394,402	\$1,470,700	
38	HSA #2											

	A	B	C	D	G	H	L	M	R	S	T	V	W	X	Y	Z
1	Appendix B-1, Page 3															
2																
3	<b>Program: Family Caregiver Support Program</b>															
4	(Same as Line 9 on HSA #1)															
5																
6	<b>Operating Expense Detail</b>															
7																
8																
9	<u>Expenditure</u> Category	TERM	Actual 10/1/20-6/30/21	Actual 7/1/21-6/30/22	Current 7/1/22-6/30/22	Modification	Revised 7/1/22-6/30/23	Current 7/1/23-6/30/24	Total Budget 10/1/20-6/30/24							
10	Rental of Property		\$35,437	\$36,475	\$47,249	\$ 4,456	\$51,705	\$47,249	\$170,866							
11	Telecommunications (Phones, Omlne Access, Web Services, Web Programming & Maint)		\$16,036	\$34,000	\$33,737	\$2,500	\$36,237	\$33,737	\$120,010							
12	Office Supplies, Postage		\$8,250	\$7,000	\$11,000		\$11,000	\$11,000	\$37,250							
13	Software Systems License		\$12,750	\$12,000	\$17,000		\$17,000	\$17,000	\$58,750							
14	Printing and Reproduction		\$750	\$1,000	\$1,000		\$1,000	\$1,000	\$3,750							
15	Insurance		\$2,250	\$3,500	\$3,000	\$500	\$3,500	\$3,000	\$12,250							
16	Staff Training		\$750	\$2,000	\$1,000		\$1,000	\$1,000	\$4,750							
17	Staff Travel-(Local & Out of Town)		\$750	\$500	\$1,000		\$1,000	\$1,000	\$3,250							
18	Dues and Subscriptions			\$2,500	\$0		\$0	\$0	\$2,500							
19	Rental of Equipment		\$2,025	\$1,000	\$2,700		\$2,700	\$2,700	\$8,425							
20																
21	<b>CONSULTANTS</b>															
22	Graphic Designer		\$6,250	\$2,000	\$8,333		\$8,333	\$8,333	\$24,916							
23	Comm Consultant		\$12,500	\$20,000	\$18,714	\$5,000	\$23,714	\$18,714	\$74,928							
24	Audit		\$4,500	\$8,000	\$9,357		\$9,357	\$9,357	\$31,214							
25																
26	<b>OTHER</b>															
27	Respite		\$27,390	\$38,300	\$36,520	\$75,000	\$111,520	\$36,520	\$213,730							
28	Legal Services		\$4,860	\$3,200	\$6,480		\$6,480	\$6,480	\$21,020							
29	Supplemental		\$1,600	\$3,000	\$0		\$0	\$0	\$4,600							
30	Caregiver Education Events		\$6,718		\$6,250		\$6,250	\$6,250	\$19,218							
31	Publications & Translations		\$9,863	\$9,000	\$13,150		\$13,150	\$13,150	\$45,163							
32	Advertisements (KQED); website video, other communications			\$11,267		\$3,000	\$3,000									
33	Computer Equipment (each under \$500)		\$2,250	\$5,000	\$3,000		\$3,000	\$3,000	\$13,250							
34																
35																
36	<b>TOTAL OPERATING EXPENSE</b>		<b>\$154,929</b>	<b>\$199,742</b>	<b>\$219,490</b>	<b>\$90,456</b>	<b>\$309,946</b>	<b>\$219,490</b>	<b>\$884,107</b>							
37																



	A	B	E	K	O	P	Q
1	Appendix B-1, Page 4						
2							
3	<b>Program: Family Caregiver Support Program</b>						
4	(Same as Line 9 on HSA #1)						
5							
6							
7	<b>Program Expenditure Detail</b>						
8	<b>SUBC</b>		Actual	Actual	Current	Current	Total Budget
	<b>ONTR</b>		10/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/22	7/1/23-6/30/24	10/1/20-6/30/24
9		Self Help for the Elderly	\$91,722	\$91,000	\$75,000	\$75,000	\$332,722
10		Kimochi	\$39,635	\$70,000	\$60,000	\$60,000	\$169,643
11		Stepping Stone	\$70,000	\$53,000	\$37,000	\$37,000	\$160,008
12							
13	<b>TOTAL SUBCONTRACTOR COST</b>		<b>\$201,357</b>	<b>\$214,000</b>	<b>\$172,000</b>	<b>\$172,000</b>	<b>\$759,357</b>
14							
15							
16	<b>EQUIPMENT</b>		<b>TERM</b>				
17	No.	ITEM/DESCRIPTION					
18							
19							
20							
21	<b>TOTAL EQUIPMENT COST</b>						
22							
23	<b>R E M O D E L I N G</b>						
24	Description:						
25	Facility Move			\$47,632			
26							
27							
28	<b>TOTAL REMODELING COST</b>			<b>\$47,632</b>			<b>\$47,632</b>
29							
30	<b>TOTAL CAPITAL/SUBCONTRACTOR EXPENDITURE</b>		<b>\$201,357</b>	<b>\$261,632</b>	<b>\$172,000</b>	<b>\$172,000</b>	<b>\$806,989</b>
31							
32	<b>HSA #4</b>						<b>Date: 9/7/2022</b>

	A	G	H
1	Appendix B-2, Page 1		
2			
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>		
4			
5	Name		
6	<b>Family Caregiver Alliance</b>		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>		
8	If modification, Effective Date of Mod.          No. of Mod.		
9	<b>Program: Family Caregiver Support Program - Cares Act</b>		
10	Budget Reference Page No.(s)		
11	Program Term	Actual 10/1/20-9/30/21	Total 10/1/20-9/30/21
12	<b>Expenditures</b>		
13	Salaries & Benefits	\$81,080	\$81,080
14	Operating Expenses	\$149,973	\$149,973
15	<b>Subtotal</b>	<b>\$231,052</b>	<b>\$231,052</b>
16	Indirect Percentage (%) (max 10%)	7%	7%
17	Indirect Cost (Line 16 X Line 15)	\$16,174	\$16,174
18	Capital/Subcontractor Expenditures		
19	Total Expenditures	\$247,226	\$247,226
20	<b>HSA Revenues</b>		
21			
22	General Fund		
23	Cares Act (Federal 100%)	\$247,226	\$247,226
24			
25			
26			
27			
28			
29	TOTAL HSA REVENUES	\$247,226	\$247,226
30	<b>Other Revenues</b>		
31			
32			
33			
34			
35			
36	Total Revenues	\$247,226	\$247,226
37	Full Time Equivalent (FTE)	1.23	1.23
39	Prepared by:		
40	HSA-CO Review Signature:		
41	<b>HSA #1</b>		

	A	B	C	D	E	J	K
1	Appendix B-2, Page 2						
2							
3							
4	<b>Program: Family Caregiver Support Program - Cares Act</b>						
5	(Same as Line 9 on HSA #1)						
6							
7	<b>Salaries &amp; Benefits Detail</b>						
8							
9							
10							
11		Agency Totals		HSA Program			
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Actual 10/1/20-9/30/21	Total 10/1/20-9/30/21
13	Clinical Services Director	\$ 88,000	1.00	5%	0.05	\$4,400	\$4,400
14	Family Consultant 1	\$ 64,000	1.00	4%	0.04	\$2,560	\$2,560
15	Family Consultant 2	\$ 63,000	1.00	51%	0.51	\$20,815	\$20,815
16	Family Consultant 3	\$ 59,000	1.00	4%	0.04	\$5,860	\$5,860
17	Resource Coordinator (Intake)	\$ 48,000	1.00	4%	0.04	\$1,920	\$1,920
18	Education Coord	\$ 44,500	1.00	8%	0.08	\$3,338	\$3,338
19	Database/Fiscal Asst	\$ 44,500	1.00	5%	0.05	\$2,225	\$2,225
20	Act Mgr Acct/Vouchered Svs	\$ 77,000	1.00	3%	0.03	\$1,925	\$1,925
21	Sr Acct /Vouchered Svs	\$ 59,000	1.00	2%	0.02	\$1,180	\$1,180
22	Operations Director	\$ 100,000	1.00	2%	0.02	\$2,000	\$2,000
23	Communications Dir	\$ 96,800	1.00	5%	0.05	\$7,840	\$7,840
25	Community Engagement	\$ 63,000	1.00	20%	0.20	\$0	\$0
26	Instructional Designer I	\$ 68,250	1.00	10%	0.10	\$6,825	\$6,825
31	Sr Program Mgr (Exec Dir)	\$ 147,000	1.00	1%	0.01	\$1,470	\$1,470
32	Totals			1.23	1.23	\$62,358	\$62,358
33	FRINGE BENEFIT RATE	30%					
34	EMPLOYEE FRINGE BENEFITS					\$18,722	\$18,722
35							
36							
37	TOTAL SALARIES & BENEFITS	\$147,000				\$81,080	\$81,080
38	HSA #2						

	A	B	C	D	L	M
1	Appendix B-2, Page 3					
2						
3						
4	<b>Program: Family Caregiver Support Program - Cares Act</b>					
5	(Same as Line 9 on HSA #1)					
6						
7	<b>Operating Expense Detail</b>					
8						
9						
10						
	<u>Expenditure</u>				Actual	Total
11	<u>Category</u>			TERM	10/1/20-9/30/21	10/1/20-9/30/21
12	Rental of Property				\$13,508	\$13,508
13	Telecommunications (phones, T1, website)				\$1,986	\$1,986
14	Office Supplies, Postage				\$1,192	\$1,192
15	Software Systems License					
16	Printing and Reproduction				\$250	\$250
17	Insurance				\$250	\$250
18	Staff Training					
19	Staff Travel-(Local Mileage)					
20	Rental of Equipment					
21						
22	<b>CONSULTANTS</b>					
23	Communications Consultant				\$6,000	\$6,000
24	Communications Consultant - Media				\$8,500	\$8,500
25	Audit				\$500	\$500
26						
27	<b>OTHER</b>					
28	Respite				\$41,650	\$41,650
29	Legal (Caregiver)					
30	Caregiver Education Events				\$3,000	\$3,000
31	Publications & Translations					
32	Video overview				\$4,500	\$4,500
33	Infographics for FactSheets				\$7,500	\$7,500
34	Photography for various content				\$4,637	\$4,637
35	Media Ads				\$56,500	\$56,500
36	Computer Eq (each under \$500)					
37						
38	<b>TOTAL OPERATING EXPENSE</b>				<b>\$149,973</b>	<b>\$149,973</b>
39						
40	<b>HSA #3</b>					