



**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
94120-7988
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 DS
EE

DATE: OCTOBER 5, 2022

SUBJECT: GRANT MODIFICATION: MULTIPLE GRANTEES (NON-PROFITS) FOR PROVISION OF COMMUNITY SERVICES FOR OLDER ADULTS AND ADULTS WITH DISABILITIES

	<u>Revised</u>				
	<u>Current</u>	<u>Modification</u>	<u>Total</u>		
GRANT TERM:	01/01/21 – 06/30/23	07/01/22 – 06/30/23	01/01/21 – 06/30/23		
	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
GRANT AMOUNT:	\$2,321,866	\$230,236	\$2,552,102	\$255,211	\$2,807,313
Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$2,552,102			\$255,211	\$2,807,313
PERCENTAGE:	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grants with multiple providers for the provision of Community Services to older adults and adults with disabilities for the period of July 1, 2022 thru June 30, 2023 in the additional amount of \$230,236 plus a 10% contingency for a revised total amount not to exceed \$2,807,313. The specific breakdown of funding per grantee is summarized in the following table.

Location	Current Amount 1/1/2021 - 6/30/2023	Modification	Revised FY22/23 Budget	Revised Total 1/1/2021 - 6/30/2023	10% Contingency	Total Not to Exceed
Bernal Heights Neighborhood Center - Cortland	\$700,083	\$85,083	\$337,159	\$785,166	\$78,517	\$863,683
Bernal Heights Neighborhood Center - Excelsior	\$908,028	\$62,931	\$386,200	\$970,959	\$97,096	\$1,068,055
Felton Institute	\$508,902	\$58,944	\$232,534	\$567,846	\$56,785	\$624,631
YMCA- Parkmerced	\$204,853	\$23,278	\$105,233	\$228,131	\$22,813	\$250,944
Total	\$2,321,866	\$230,236	\$1,061,126	\$2,552,102	\$255,211	\$2,807,313

Background

Community connection and engagement is critical to the health, functioning, and increased quality of life for older adults and adults with disabilities in San Francisco. DAS funds community centers located throughout San Francisco to provide Community Services programming intended to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities.

Community Services program and activity offerings at DAS funded community centers are designed to engage with the community around them while enhancing the cultural, educational, mental, and physical well-being of participants. Community centers are also the entry point for many older adults and adults with disabilities in need of information and support services, thus translation and social services are available through Community Services programming.

Services to be Provided

Grantees will operate a community center space designed to engage with the surrounding community which will be welcoming and accessible for older adults and adults with disabilities. Each grantee will offer a variety of activities and services designed to maintain or improve the quality of life of program participants. Activities and services shall consider the physical, social, psychological, economic, educational, recreational, and/or

creative needs of participants. While the community center may serve as a hub for operations, services may take place in the community, via telephone, virtually over the internet, and through other effective means of communication and connection.

Modification

The purpose of this modification is to provide funding in the amount of \$230,236 to DAS funded Community Services programs. This modification allocates funding provided through the Board of Supervisors addback process with annual CODB to enhance Community Services.

The following modifications include:

Bernal Heights Neighborhood Center - Cortland

The purpose of this modification is to provide funding for the agency to hire an Administrative & Activities Assistant, who will work full time and receive benefits. This additional funding will increase the agency’s ability to heighten focus areas related to overseeing hybrid services, outreach and tracking equity outcomes. Increased staffing will ensure the facility can continue to reopen in-person programming and provide a continuation of services.

Bernal Heights Neighborhood Center - Excelsior

The purpose of this modification is to provide funding for the agency to hire an Administrative & Activities Assistant, who will work full time and receive benefits. This additional funding will increase the agency’s ability to heighten focus areas related to overseeing hybrid services, outreach and tracking equity outcomes. Increased staffing will ensure the facility can continue to reopen in-person programming and provide a continuation of services.

Felton Institute

This modification will continue funding English as a Second Language (ESL) classes for older adults and adults with disabilities at the 66 Raymond location. ESL classes are essential to monolingual older adult students in Visitacion Valley. Classes focus on teaching practical, conversational English to monolingual Cantonese speakers through a series of planned activities. ESL classes are currently being provided virtually. In addition, this funding will add a part-time staff at 66 Raymond to assist with ESL classes and tech support in English, Cantonese, and Mandarin.

YMCA- Parkmerced

This modification will provide funding for additional staffing time that will increase group exercise activities. Additionally, programming will increase from two days per week to five days per week of activities. These additional dollars will restore YMCA Parkmerced's pre-pandemic funding.

Selection

Grantees were selected through Request for Proposals #785 which was competitively bid in February 2018.

Funding

These grants will be funded through Dignity Funds.

ATTACHMENTS

- **Bernal Heights Neighborhood Center - Cortland**
Appendix A-2 – Services to be provided
Appendix B-2 – Budget
- **Bernal Heights Neighborhood Center - Excelsior**
Appendix A-2 – Services to be provided
Appendix B-2 – Budget
- **Felton Institute**
Appendix A-3 – Services to be provided
Appendix B-3 – Budget
- **YMCA -Parkmerced**
Appendix A-1 – Services to be provided
Appendix B-1 – Budget

Appendix A-2 - Services to be Provided
BERNAL HEIGHTS NEIGHBORHOOD CENTER - CORTLAND

Community Services

January 1, 2021 to June 30, 2023

Modification: October 5, 2022

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in the City and County of San Francisco through site based Community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older living with a disability
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services

Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
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. Source: California Code of Regulations Title 22, Sec. 7119
Grantee	Bernal Heights Neighborhood Center – Cortland
Higher Learning Classes	College level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco’s Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person’s primary language.
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.

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 Regulations Title 22, Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SF-HSA	Human Services Agency of the City and County of San Francisco.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in CA-GetCare through enrollment.

III. Target Population

The target population is older adults living in the City and County of San Francisco. Services shall be designed to engage one or more of the following target populations, which have been identified as demonstrating the greatest economic and social need:

1. Persons with low income
2. Persons who are socially isolated
3. Persons with limited English-speaking proficiency
4. Persons from communities of color
5. Persons who identify as LGBTQ+
6. Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in the City and County of San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are four categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning
 - ii. Translation: Translation assistance provided to consumers that cannot

speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.

- iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- iv. Enhanced Outreach: While there is an expectation that community centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from DAS OCP before commencing.

Enhanced outreach efforts under this specific grant:

Enhanced outreach efforts will not be provided under this specific grant.

- 2. Grantee will ensure that service offerings in the four categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
- 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
- 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards.
- 6. Grantee will ensure that units of service provided are tracked and distinguishable.
- 7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP, and share the information with their staff and volunteers as needed.

8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	01/01/2021- 6/30/2021	FY21/22	FY22/23
Unduplicated Consumers (UDC)	213	425	425
Activity Scheduling	1400	2800	2800
Translation Services	500	100	100
Social Services	1250	2500	2500
One (1) unit of service = one (1) hour of service provision			

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.

3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Tiyana Coleman
Program Analyst
DAS OCP
Tiyana.Coleman@sfgov.org

and

Steve Kim
Contract Manager
HSA OCM
Steve.Kim@sfgov.org

X. 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; review of 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; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Bernal Heights Neighborhood Center		Term Jan 2021 - Jun 2023				
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>						
If modification, Effective Date of Mod. 7/1/2022 No. of Mod. 2						
Program: Community Services - Cortland						
Budget Reference Page No.(s)						
	Actual	Actual	Current	Modification	Revised	Revised
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	Total
Expenditures						
Salaries & Benefits	\$79,580	\$237,681	\$179,771	\$65,398	\$245,169	\$562,430
Operating Expenses	\$29,924	\$42,385	\$39,426	\$8,587	\$48,013	\$120,322
Subtotal	\$109,504	\$280,066	\$219,197	\$73,985	\$293,182	\$682,752
Indirect Percentage (%)	15%	15%	15%	15%	15%	15%
Indirect Cost	\$16,427	\$42,010	\$32,879	\$11,098	\$43,977	\$102,414
Subcontractor/Capital Expenditure						
Total Expenditures	\$125,931	\$322,076	\$252,076	\$85,083	\$337,159	\$785,166
HSA Revenues						
General Fund	\$118,803	\$237,606	\$237,606		\$237,606	\$594,015
CODB FY19/20	\$7,128	\$7,128	\$7,128		\$7,128	\$21,384
CODB FY20/21 & FY21/22		\$7,342	\$7,342		\$7,342	\$14,684
OTO Funds (FY21/22)		\$70,000				\$70,000
OTO Funds (FY22/23)				\$75,000	\$75,000	\$75,000
CODB FY22/23				\$10,083	\$10,083	\$10,083
Total HSA Revenue	\$125,931	\$322,076	\$252,076	\$85,083	\$337,159	\$785,166
Other Revenues						
TOTAL DAS AND NON DAS REVENUE	\$125,931	\$322,076	\$252,076	\$85,083	\$337,159	\$785,166
Full Time Equivalent (FTE)						
Prepared by: Adeline Siew Telephone No.: 415.206.2140 x 147						
HSA-CO Review Signature: _____						
HSA #1						10/5/2022

Program: Community Services - Cortland
(Same as Line 11 on HSA #1)

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary					
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Actual 1/1/21 - 6/30/2022	Actual FY21/22	Current FY22/23	Modificaiton FY22/23	Revised FY22/23	Total
Director of Programs:	\$80,000	1.00	100.00%	0.12	\$4,800	\$19,600	\$19,600		\$19,600	\$44,000
Senior Services Supervisor	\$52,000	1.00	100.00%	1.00		\$54,000	\$54,000		\$54,000	\$108,000
Social Services/Volunteer Coordin	\$47,840	1.00	100.00%	1.00	\$23,920	\$49,000	\$49,000		\$49,000	\$121,920
Exercise Instructor	\$124,800	1.00	100.00%	0.03	\$1,560	\$3,120	\$3,120	\$500	\$3,620	\$8,300
Exercise Instructor	\$52,000	1.00	100.00%	0.05	\$1,300	\$2,600	\$2,600	\$1,000	\$3,600	\$7,500
Ass. Program Director	\$63,440	1.00	100.00%	0.30	\$9,516					\$9,516
Program Manager					\$5,980	\$18,552	\$18,552		\$18,552	\$43,084
Social Services/Volunteer Coordinator: I. Ritner-Gill					\$10,672					\$10,672
Social Services/Volunteer Coordinator: A. Rivera					\$736					\$736
Admin & Activity Coordinator		0.38	100.00%	0.38		\$47,312		\$48,000	\$48,000	\$95,312
Totals	\$420,080	6.38	700.00%	2.87	\$58,484	\$194,184	\$146,872	\$49,500	\$196,372	\$449,040
Fringe Benefits Rate	22.40%									
Employee Fringe Benefits	\$94,098				\$21,096	\$43,497	\$32,899	\$15,898	\$48,797	\$113,390
Total Salaries and Benefits	\$514,178				\$79,580	\$237,681	\$179,771	\$65,398	\$245,169	\$562,430
HSA #2										10/5/2022

Program: Community Services - Cortland

(Same as Line 11 on HSA #1)

Operating Expense Detail

	Actual 1/1/21 - 6/30/21	Actual FY21/22	Current FY22/23	Modification FY22/23	Revised FY22/23	Revised Total
<u>Expenditure Category</u>						
Rental of Property						
Utilities (Elec, Water, Gas, Phone, Garbage)	\$2,000	\$4,100	\$4,100	\$1,000	\$5,100	\$11,200
Office Supplies, Postage	\$1,300	\$2,600	\$2,600	\$1,500	\$4,100	\$8,000
Building Maintenance Supplies and Repair	\$4,200	\$8,400	\$8,400	\$1,000	\$9,400	\$22,000
Printing and Reproduction	\$300	\$600	\$600	\$1,000	\$1,600	\$2,500
Insurance	\$720	\$1,440	\$1,440	\$1,000	\$2,440	\$4,600
Staff Training	\$1,000	\$3,000	\$3,000		\$3,000	\$7,000
Staff Travel-(Local & Out of Town)	\$1,350	\$2,700	\$2,700		\$2,700	\$6,750
Rental of Equipment	\$400	\$900	\$900		\$900	\$2,200
<u>Consultant</u>						
Consultant A						\$ -
<u>Other</u>						
Program expenses for						\$ -
activities, food, arts, crafts	\$18,654	\$18,645	\$15,686	\$3,087	\$18,773	\$56,072
Total Operating Expenses	\$29,924	\$42,385	\$39,426	\$8,587	\$48,013	\$120,322
HSA #3						10/5/2022

Appendix A-2 - Services to be Provided
BERNAL HEIGHTS NEIGHBORHOOD CENTER - EXCELSIOR

Community Services

January 1, 2021 to June 30, 2023

Modification: October 5, 2022

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in the City and County of San Francisco through site based Community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

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CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services

Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
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. Source: California Code of Regulations Title 22, Sec. 7119
Grantee	Bernal Heights Neighborhood Center – Cortland
Higher Learning Classes	College level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco’s Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person’s primary language.
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.

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 Regulations Title 22, Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SF-HSA	Human Services Agency of the City and County of San Francisco.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in CA-GetCare through enrollment.

III. Target Population

The target population is older adults living in the City and County of San Francisco. Services shall be designed to engage one or more of the following target populations, which have been identified as demonstrating the greatest economic and social need:

1. Persons with low income
2. Persons who are socially isolated
3. Persons with limited English-speaking proficiency
4. Persons from communities of color
5. Persons who identify as LGBTQ+
6. Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in the City and County of San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are four categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning
 - ii. Translation: Translation assistance provided to consumers that cannot

speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.

- iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- iv. Enhanced Outreach: While there is an expectation that community centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from DAS OCP before commencing.

Enhanced outreach efforts under this specific grant:

The Outreach and Wellness Coordinator, will conduct wellness calls to existing and past consumers who haven't returned or received services this fiscal year. They will assist with COVID-19 friendly wellness outreach and education about the program and visit housing sites to support existing activities/deliveries.

- 2. Grantee will ensure that service offerings in the four categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
- 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
- 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards.

6. Grantee will ensure that units of service provided are tracked and distinguishable.
7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP, and share the information with their staff and volunteers as needed.
8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	01/01/2021- 6/30/2021	FY21/22	FY22/23
Unduplicated Consumers (UDC)	213	425	425
Activity Scheduling	1400	2800	2800
Translation Services	500	1000	1000
Social Services	1250	3000	3000
Enhanced Outreach	720	1440	1440
One (1) unit of service = one (1) hour of service provision			

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Tiyana Coleman
Program Analyst
DAS OCP
Tiyana.Coleman@sfgov.org

and

Steve Kim
Contract Manager
HSA OCM
Steve.Kim@sfgov.org

X. 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; review of 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; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name Bernal Heights Neighborhood Center		Term Jan 2021 - Jun 2023				
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>						
If modification, Effective Date of Mod. 7/1/2022 No. of Mod. 2						
Program: Community Services - Excelsior						
Budget Reference Page No.(s)						
	Actual	Actual	Current	Modification	Revised	Revised
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	Total
Expenditures						
Salaries & Benefits	\$114,024	\$201,745	\$158,901	\$69,399	\$228,300	\$544,069
Operating Expenses	\$69,880	\$122,837	\$122,202	(\$14,676)	\$107,526	\$300,243
Subtotal	\$183,904	\$324,582	\$281,103	\$54,723	\$335,826	\$844,312
Indirect Percentage (%)	15%	15%	15%	15%	15%	15%
Indirect Cost	\$27,586	\$48,687	\$42,166	\$8,208	\$50,374	\$126,647
Subcontractor/Capital Expenditure						
Total Expenditures	\$211,490	\$373,269	\$323,269	\$62,931	\$386,200	\$970,959
HSA Revenues						
General Fund	\$202,362	\$304,725	\$304,725		\$304,725	\$811,812
CODB FY19/20	\$9,128	\$9,128	\$9,128		\$9,128	\$27,384
CODB FY20/21 & FY21/22		\$9,416	\$9,416		\$9,416	\$18,832
OTO Funds (FY21/22)		\$50,000				\$50,000
OTO Funds (FY22/23)				\$50,000	\$50,000	\$50,000
CODB FY22/23				\$12,931	\$12,931	\$12,931
Total HSA Revenue	\$211,490	\$373,269	\$323,269	\$62,931	\$386,200	\$970,959
Other Revenues						
TOTAL DAS AND NON DAS REVENUE	\$211,490	\$373,269	\$323,269	\$62,931	\$386,200	\$970,959
Full Time Equivalent (FTE)						
Prepared by:	Telephone No.:					
HSA-CO Review Signature:	_____					
HSA #1						10/5/2022

Program: Community Services - Excelsior
(Same as Line 11 on HSA #1)

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary					
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Actual FY 20/21	Actual FY21/22	Current FY22/23	Modification	Revised FY22/23	Total
Director of Program:	\$80,000	1.00	100.00%	0.08	\$3,200	\$21,800	\$21,800	(\$7,000)	\$14,800	\$39,800
Asst. Program Director: S. Won	\$63,440	1.00	100.00%	0.70	\$22,204					\$22,204
Senior Program Manager:	\$52,000	1.00	100.00%	1.00	\$31,200	\$38,340	\$38,340	\$2,620	\$40,960	\$110,500
Social Services Coordinator: Z. Peng	\$47,840	1.00	100.00%	0.63	\$14,950	\$31,980	\$31,980	\$1,820	\$33,800	\$80,730
Senior Program Assistant:	\$41,600	1.00	100.00%	0.50	\$10,400	\$22,880	\$22,880	\$5,720	\$28,600	\$61,880
Outreach Coordinator: G. Reyes	\$47,840	1.00	100.00%	1.00	\$2,369					\$2,369
Outreach Coordinator: C. Aleman		0.50	100.00%	0.50	\$4,784	\$23,920				\$28,704
Admin & Activity Assistant				0.00		\$22,800		\$28,600	\$28,600	\$51,400
Admin & Activity Assistant				0.00				\$35,880	\$35,880	\$35,880
				0.00						
Totals	\$332,720	6.50	700.00%	4.41	\$89,107	\$161,720	\$115,000	\$67,640	\$182,640	\$433,467
Fringe Benefits Rate	24.75%									
Employee Fringe Benefits	\$82,348				\$24,917	\$40,025	\$43,901	\$1,759	\$45,660	\$110,602
Total Salaries and Benefits	\$415,068				\$114,024	\$201,745	\$158,901	\$69,399	\$228,300	\$544,069
HSA #2										10/5/2022

Program: Community Services - Excelsior

(Same as Line 11 on HSA #1)

Operating Expense Detail

	Actual 1/1/21 - 6/30/21	Actual FY21/22	Current FY22/23	Modification FY22/23	Revised FY22/23	Revised Total
<u>Expenditure Category</u>						
Rental of Property	\$20,764	\$41,528	\$41,528	(\$12,968)	\$28,560	\$90,852
Utilities (Elec, Water, Gas, Phone, Garbage)	\$5,000	\$8,240	\$8,240	\$760	\$9,000	\$22,240
Office Supplies, Postage	\$1,000	\$17,288	\$15,350	\$1,938	\$17,288	\$35,576
Building Maintenance Supplies and Repair	\$7,500	\$6,380	\$6,380		\$6,380	\$20,260
Printing and Reproduction	\$500	\$1,000	\$1,000		\$1,000	\$2,500
Insurance	\$1,320	\$2,640	\$2,640	\$3,000	\$5,640	\$9,600
Staff Training	\$500	\$2,250	\$2,250		\$2,250	\$5,000
Staff Travel-(Local & Out of Town)	\$3,000	\$5,388	\$5,388		\$5,388	\$13,776
Rental of Equipment	\$870	\$1,200	\$1,200		\$1,200	\$3,270
<u>Consultant</u>						
<u>Other</u>						
Program expenses for						
activities, food, arts, crafts	\$29,426	\$36,923	\$38,226	(\$7,406)	\$30,820	\$97,169
Total Operating Expenses	\$69,880	\$122,837	\$122,202	(\$14,676)	\$107,526	\$300,243

Appendix A-3 - Services to be Provided

FELTON INSTITUTE

Community Services

January 1, 2021 to June 30, 2023

Modification: October 5, 2022

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in the City and County of San Francisco through site based Community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older living with a disability
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services

Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
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. Source: California Code of Regulations Title 22, Sec. 7119
Grantee	Bernal Heights Neighborhood Center – Cortland
Higher Learning Classes	College level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco’s Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person’s primary language.
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.

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 Regulations Title 22, Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SF-HSA	Human Services Agency of the City and County of San Francisco.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in CA-GetCare through enrollment.

III. Target Population

The target population is older adults living in the City and County of San Francisco. Services shall be designed to engage one or more of the following target populations, which have been identified as demonstrating the greatest economic and social need:

1. Persons with low income
2. Persons who are socially isolated
3. Persons with limited English-speaking proficiency
4. Persons from communities of color
5. Persons who identify as LGBTQ+
6. Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in the City and County of San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are four categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning
 - ii. Translation: Translation assistance provided to consumers that cannot

speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.

- iii. Social Services: The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- iv. Enhanced Outreach: While there is an expectation that community centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from DAS OCP before commencing.

Enhanced outreach efforts under this specific grant:

The Outreach and Wellness Coordinator, will conduct wellness calls to existing and past consumers who haven't returned or received services this fiscal year. They will assist with COVID-19 friendly wellness outreach and education about the program and visit housing sites to support existing activities/deliveries.

- 2. Grantee will ensure that service offerings in the four categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
- 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and the grantee. At minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.
- 5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards.

6. Grantee will ensure that units of service provided are tracked and distinguishable.
7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP, and share the information with their staff and volunteers as needed.
8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	01/01/2021- 6/30/2021	FY21/22	FY22/23
Unduplicated Consumers (UDC)	108	216	288
Activity Scheduling	414	828	1104
Translation Services	113	225	300
Social Services	75	150	200
Enhanced Outreach	65	130	173
One (1) unit of service = one (1) hour of service provision			

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Tiyana Coleman
Program Analyst
DAS OCP
Tiyana.Coleman@sfgov.org

and

Rocio Duenas
Contract Manager
HSA OCM
rocio.duenas@sfgov.org

X. 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; review of 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; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**Name: **Felton Institute**

Term:

January 1, 2021 - June 30, 2023(Check One) New Renewal Modification

If modification, Effective Date of Mod. 7/1/22 No. of Mod. 3

Program: Community Services

Budget Reference Page No.(s)

Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22 - 6/30/23	Modification 7/1/22 - 6/30/23	REVISED 7/1/22 - 6/30/23	Total 1/1/21-6/30/23
Expenditures						
Salaries & Benefits	\$67,646	\$109,742	\$89,872	\$17,599	\$107,471	\$284,859
Operating Expenses	\$13,145	\$27,053	\$25,185	\$6,228	\$31,413	\$71,611
Subtotal	\$80,791	\$136,795	\$115,057	\$23,827	\$138,884	\$356,470
Indirect Percentage (%)	15%	15%	15%	15%	15%	15%
Indirect Cost	\$12,118	\$20,520	\$17,258	\$3,575	\$20,833	\$53,471
Subcontractor/Capital Expenditure	\$43,813	\$41,275	\$41,275	\$31,542	\$72,817	\$157,905
Total Expenditures	\$136,722	\$198,590	\$173,590	\$58,944	\$232,534	\$567,846
HSA Revenues						
General Funds	\$129,222	\$198,590	\$173,590	\$58,944	\$232,534	\$560,346
Federal Funds	\$7,500					\$7,500
Total HSA Revenue	\$136,722	\$198,590	\$173,590	\$58,944	\$232,534	\$567,846
Other Revenues						
TOTAL DAS AND NON DAS REVENUE	\$136,722	\$198,590	\$173,590	\$58,944	\$232,534	\$567,846
Full Time Equivalent (FTE)						
Prepared by: Ray Mallett						
HSA-CO Review Signature:	_____					
HSA #1	10/5/2022					

Program: Community Services
(Same as Line 11 on HSA #1)

Appendix B-3, Page 2
Document Date: 10/5/2022

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budgeted salary					
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22 - 6/30/23	Modification 7/1/22 - 6/30/23	REVISED 7/1/22-6/30/23	Total 1/1/21-6/30/23
Program Manager	\$70,000	1.00	14%	0.14	\$15,330	\$11,454	\$11,454	\$1,904	\$13,358	\$40,142
Activities Supervisor	\$50,000	1.00	100%	1.00	\$28,500	\$54,872	\$54,872	\$5,000	\$59,872	\$143,244
Senior Division Director	\$155,000	1.00	2%	0.02	\$4,503	\$2,806	\$2,806	\$634	\$3,440	\$10,749
Tech-Squad Program Coordinator	\$55,000	1.00	11%	0.11	\$3,702			\$6,000	\$6,000	\$9,702
Community Liaison D1 Resident	\$48,925	1.00	20%	0.20		\$9,785				\$9,785
Program Coordinator/Chinese lang.	\$55,000	1.00	10%	0.10		\$5,500				\$5,500
Totals	\$433,925	6.00	156.28%	1.56	\$52,035	\$84,417	\$69,132	\$13,538	\$82,670	\$219,122
Fringe Benefits Rate	30.00%									
Employee Fringe Benefits	\$130,178				\$15,611	\$25,325	\$20,740	\$4,061	\$24,801	\$65,737
Total Salaries and Benefits	\$564,103				\$67,646	\$109,742	\$89,872	\$17,599	\$107,471	\$284,859
HSA #2						5/14/21				10/5/2022

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B-3, Page 3
 Document Date: 10/5/2022

Operating Expense Detail

	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22 - 6/30/23	Modification 7/1/22 - 6/30/23	REVISED 7/1/22-6/30/23	Total 1/1/21-6/30/23
<u>Expenditure Category</u>						
Rental of Property	\$4,200	\$8,400	\$8,400		\$8,400	\$21,000
Utilities (Elec, Water, Gas, Phone, Garbage)	\$2,600	\$8,185	\$12,000	(\$1,200)	\$10,800	\$21,585
Office Supplies, Postage	\$1,220	\$2,000	\$2,000	\$700	\$2,700	\$5,920
Building Maintenance Supplies and Repair						
Printing and Reproduction	\$368	\$1,868		\$1,000	\$1,000	\$3,236
Insurance	\$975	\$800	\$798	\$402	\$1,200	\$2,975
Staff Training						
Staff Travel-(Local & Out of Town)	\$182	\$400	\$364	\$336	\$700	\$1,282
Rental of Equipment						
<u>Consultant</u>						
<u>Other</u>						
Activities Supplies and Program Expenses	\$3,600	\$5,400	\$1,623	\$4,990	\$6,613	\$15,613
Total Operating Expenses	\$13,145	\$27,053	\$25,185	\$6,228	\$31,413	\$71,611
HSA #3						10/5/2022

Program: Community Services
 (Same as Line 11 on HSA #1)

Appendix B-3, Page 4
 Document Date: 10/5/2022

Subcontractor & Capital Expenditure Detail

<u>Subcontractor Expenditure</u>	1/1/21-6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Modification 7/1/22 - 6/30/23	REVISED 7/1/22-6/30/23	Total 1/1/21-6/30/23
Asian Pacific American Community Center	\$20,638	\$41,275	\$41,275	\$3,302	\$44,577	\$106,490
ESL teacher	\$9,555			\$28,240	\$28,240	\$37,795
Total Subcontractor Expenditure	\$30,193	\$41,275	\$41,275	\$31,542	\$72,817	\$144,285
<u>Equipment (Qty)</u>	1/1/21-6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Modification 7/1/22 - 6/30/23	REVISED 7/1/22-6/30/23	Total 1/1/21-6/30/23
Equipment purchases for Internet access for se	\$700					\$700
14 iPads	\$4,900					\$4,900
14 Samsung Galaxy Tablet	\$3,500					\$3,500
Macpro laptop	\$1,420					\$1,420
Electric piano	\$3,100					\$3,100
Total Equipment Cost	\$13,620					\$13,620
<u>Remodeling</u>	1/1/21-6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Modification 7/1/22 - 6/30/23	REVISED 7/1/22-6/30/23	Total 1/1/21-6/30/23
Total Remodeling Cost						
Total Capital Expenditure	\$43,813	\$41,275	\$41,275	\$31,542	\$72,817	\$157,905

HSA #4

10/5/2022

Appendix A-1 - Services to be Provided
YMCA SAN FRANCISCO – PARKMERCED

Community Services

January 1, 2021 to June 30, 2023

Modification: October 5, 2022

I. Purpose

The purpose of this grant is to provide Community Services programming for older adults and adults with disabilities in the City and County of San Francisco through site based Community centers. The programming will maintain or improve the well-being of older adults and adults with disabilities by providing activities and services designed to support individuals to live independently in their own homes and communities, reduce social isolation, and serve as an access point for other home and community-based services.

II. Definitions

Adult with a Disability	A person 18 years of age or older living with a disability
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CA-GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
DAS	Department of Disability and Aging Services

Disability	Mental, cognitive and/or physical impairments, including hearing and visual impairments, that result in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, and self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment. Source: California Code of Regulations Title 22, Sec. 7630
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. Source: California Code of Regulations Title 22, Sec. 7119
Grantee	YMCA San Francisco - Parkmerced
Higher Learning Classes	College level classes that are taught by instructors with advanced degrees and teaching experience in the field of study. Higher learning classes were originally part of City College of San Francisco's Older Adults program. Classes are provided at community service centers throughout the City and supplement traditional Community Services programming.
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.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person's primary language.
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.

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 Regulations Title 22, Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management, San Francisco Human Services Agency.
Older Adult	Person who is 60 years or older, used interchangeably with “senior”
Senior	Person who is 60 years or older, used interchangeably with “older adult”
SF-HSA	Human Services Agency of the City and County of San Francisco.
Social Services	Service units are captured by providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, and emotional support by phone or in person.
SOGI	Sexual Orientation and Gender Identity; <i>Ordinance No. 159-16</i> 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 (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	An individual who participates in Community Services and the grantee reflects consumer participation in CA-GetCare through enrollment.

III. Target Population

The target population is older adults living in the City and County of San Francisco. Services shall be designed to engage one or more of the following target populations, which have been identified as demonstrating the greatest economic and social need:

1. Persons with low income
2. Persons who are socially isolated
3. Persons with limited English-speaking proficiency
4. Persons from communities of color
5. Persons who identify as LGBTQ+
6. Persons at risk of institutionalization

IV. Eligibility for Services

To be eligible for services, clients must be:

- 1) An older adult aged 60 years or older or
- 2) An adult with a disability, aged 18-59 and
- 3) A resident of San Francisco and
- 4) In need of Community Services

V. Location and Time of Services

The grantee will provide Community Services programming in the City and County of San Francisco. The details of the sites and operation hours are located in the site chart.

VI. Description of Services and Program Requirements

1. Grantee will provide Community Services programming for older adults and adults with disabilities. Community Services programming shall consist of activities and services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older adults and adults with disabilities. Activities and services may be provided in the grantee's community center, in the community, via telephone, virtually over the internet, and through other effective means of communication and connection. There are four categories of Community Services programming:
 - i. Activity Scheduling: Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes, provides opportunities for connection with other participants, and that help participants maintain or enhance their level of functioning
 - ii. Translation: Translation assistance provided to consumers that cannot

speak/read English. Translation may also include the use of American Sign Language, braille, or teleprompting. Services may include translation for an individual, such as translation of forms, letters, applications, or phone calls, and may also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements or presentations.

- iii. **Social Services:** The provision of one-to-one assistance to individuals that enables them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.
- iv. **Enhanced Outreach:** While there is an expectation that community centers will do outreach within their existing budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from DAS OCP before commencing.

Enhanced outreach efforts under this specific grant are summarized as follows:

The Parkmerced Senior Program by the Stonestown Family YMCA will conduct flier distribution, tabling at local events, and facilitate word of mouth recommendations by current participating clients. YMCA staff will ensure that flier communications are dropped off at local agencies and locations where older adults congregate (libraries, banks, other community centers, etc.). Staff will attend local farmer's markets which provides a great opportunity to outreach to new older adults who may need our services. Other tools such as Stonestown Family YMCA's website, Parkmerced website and communication outlets, social media (e.g. Facebook, Instagram, and Twitter) and email are also utilized to reach older adults who have access to these platforms.

- 2. Grantee will ensure that service offerings in the four categories of Community Services are designed to:
 - i. Provide quality services that attain a high satisfaction level from participants.
 - ii. Provide services that meet the needs of individual participants.
 - iii. Provide physical activities that may improve the health of participants.
 - iv. Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
 - v. Provide activities to increase socialization opportunities for individual consumers.
- 3. Grantee will develop and maintain policies and procedures that align with city, state, and local regulatory agencies, including the DAS OCP policy memoranda.
- 4. Grantee will administer an annual consumer satisfaction survey using a survey tool approved by DAS OCP. The grantee will share the survey results with DAS OCP by March 15th each grant year or on a mutually agreed upon date between DAS OCP and

the grantee. At minimum, the consumer response rate shall be at least 35% of the annual unduplicated consumers.

5. Grantee will ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all program standards.
6. Grantee will ensure that units of service provided are tracked and distinguishable.
7. Grantee will attend in-service trainings and meetings coordinated and provided by DAS OCP, and share the information with their staff and volunteers as needed.
8. Grantee shall follow guidance or instructions from the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments related to the provision of services in the community. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. The grantee shall follow the requirements with the intent to maximize the health and safety of their staff and clients receiving services.

VII. Service Objectives

Grantee will enroll at minimum the number of unduplicated consumers and provide the units of service detailed in Table A below:

Table A- Community Services	01/01/2021- 6/30/2021	FY21/22	FY22/23
Unduplicated Consumers (UDC)	63	125	125
Activity Scheduling	325	650	650
Translation Services	38	75	75
Social Services	50	100	100
Enhanced Outreach	50	100	100
One (1) unit of service = one (1) hour of service provision			

VIII. Outcome Objectives

Community Services

1. Consumers receive the services and/or activities they need from the agency. Target: 80%
2. Consumers who participate in physical activity programming report a positive impact on their health. Target: 80%
3. Consumers who received social services or translation assistance, or participated in an educational program, report the services helped to improve their lives. Target: 80%
4. Consumers report an increase in their socialization opportunities and interaction with others. Target: 80%

Based on an annual satisfaction survey created by DAS OCP and with a sample size of at least 35% of the annual unduplicated consumers.

IX. Reporting and Other Requirements

1. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers, using the DAS OCP approved intake form, into the CA-GetCare database in accordance to DAS OCP policy memorandum.
2. Grantee will enter into the CA-GetCare Service Unit section all service objectives by the 5th working day of the month for the preceding month.
3. Grantee will enter monthly reports and metrics into the CARBON database system by the 15th of the following month that includes the following information:
 - Number of unduplicated consumers served
 - Number and type of service units provided
4. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
5. Grantee will submit response rates and aggregated data from the annual participant survey to OCP staff by March 15th of each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
6. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
7. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31st of each grant year. The grantee must submit the report in the CARBON system.
8. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
9. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are January 10th (June-December data) and July 10th (January-June data).
10. Grantee will maintain an updated site chart, using the DAS OCP approved form, with details about the program.
11. Grantee program staff will complete an Elder Abuse Mandated Reporter Training and the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of these trainings.
12. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
13. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
14. For assistance with reporting and contract requirements, please contact:

Reanna Albert
Program Analyst
DAS OCP
Reanna.Albert@sfgov.org

Patrick Garcia
Contract Manager
HSA OCM
Patrick.Garcia@sfgov.org

X. 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; review of 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; a board of director list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name YMCA (Parkmerced)							Term 1/1/21 - 6/30/23
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>							
If modification, Effective Date of Mod. 7/1/2022 No. of Mod.#1							
Program: Community Services							
Budget Reference Page No.(s)							
				Modification		(Total)	
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	10/1/22 - 6/30/23	7/1/22 - 6/30/23	1/1/21 - 6/30/23	
Expenditures							
Salaries & Benefits	\$35,348	\$54,668	\$57,186	\$15,649	\$72,835	\$162,851	
Operating Expenses	\$255	\$16,595	\$14,077	\$4,593	\$18,670	\$35,520	
Subtotal	\$35,603	\$71,263	\$71,263	\$20,242	\$91,505	\$198,371	
Indirect Percentage (%)	15%	15%	15%		15%	15%	
Indirect Cost	\$5,340	\$10,692	\$10,692	\$3,036	\$13,728	\$29,760	
Subcontractor/Capital Expenditure							
Total Expenditures	\$40,943	\$81,955	\$81,955	\$23,278	\$105,233	\$228,131	
HSA Revenues							
General Fund	\$34,376	\$68,752	\$68,752		\$68,752	\$171,880	
Federal Funds (CDFA 93.778)	\$4,249	\$8,498	\$8,498		\$8,498	\$21,245	
CODB	\$2,318	\$4,705	\$4,705	\$3,278	\$7,983	\$15,006	
OTO (FY 22/23)				\$20,000	\$20,000	\$20,000	
Total HSA Revenue	\$40,943	\$81,955	\$81,955	\$23,278	\$105,233	\$228,131	
Other Revenues							
TOTAL DAS AND NON DAS REVENUE	\$40,943	\$81,955	\$81,955	\$23,278	\$105,233	\$228,131	
Full Time Equivalent (FTE)							
Prepared by:							
HSA-CO Review Signature: _____							
HSA #1						10/5/2022	

Program: Community Services

Salaries & Benefits Detail

Position	Agency Totals		HSA Program		DAS budget	Agency Totals		HSA Program		DAS budget	Agency Totals		HSA Program		DAS budget	Modification		(Total)	
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	1/1/21 - 6/30/21	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	7/1/21 - 6/30/22	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	7/1/22 - 6/30/23	10/1/22 - 6/30/23	DAS budget	DAS budget	DAS budget
Program Director	\$85,424	1.00	50%	0.50	\$21,356	\$97,175	1.00	22%	0.22	\$20,950	\$97,175	1.00	23%	0.23	\$22,350			\$22,350	\$64,656
Program Coordinator	\$66,186	1.00	11%	0.11	\$3,570	\$54,080	1.00	30%	0.30	\$16,224	\$54,080	1.00	30%	0.30	\$16,224			\$16,224	\$36,018
Group Exercise Instructor						\$75,463	1.00	4%	0.04	\$3,294	\$75,463	1.00	12%	0.12	\$3,773	\$5,250		\$9,023	\$12,317
Support Staff (Nov 2022 - June 2022)											\$41,600	1.00	30%	0.30		\$8,362		\$8,362	\$8,362
Food Pantry Support	\$36,800	0.20	50%	0.10	\$3,683														\$3,683
Totals	\$188,410	2.20	111%	0.71	\$28,609	\$226,718	3.00	56%	0.56	\$40,468	\$268,318	4.00	95%	0.95	\$42,347	\$13,612		\$55,959	\$125,036
Fringe Benefits Rate	24%					35%					30%					35%			
Employee Fringe Benefits	\$44,382				\$6,739	\$79,553				\$14,200	\$94,150				\$14,839	\$2,037		\$16,876	\$37,815
Total Salaries and Benefits	\$232,792				\$35,348	\$306,271				\$54,668	\$362,468				\$57,186	\$15,649		\$72,835	\$162,851
HSA #2																			10/5/2022

YMCA (Parkmerced)

Program: Community Services

Expenditure Category	Operating Expense Detail					(Total) 1/1/21 - 6/30/23
	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	Modification 10/1/22 - 6/30/23	7/1/22 - 6/30/23	
<u>Expenditure Category</u>						
Rental of Property						
Utilities (Elec, Water, Gas, Phone, Scavenger)						
Office Supplies, Postage		\$1,350				\$1,350
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance		\$773	\$773		\$773	\$1,546
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
<u>Consultants/Subcontractors</u>						
Guest Speakers		\$300	\$1,250		\$1,250	\$1,550
<u>Other</u>						
Program Subscriptions	\$60	\$311	\$342		\$342	\$713
Program Entrance Fee	\$195	\$3,244	\$3,000		\$3,000	\$6,439
Program Supplies		\$3,359	\$6,204	\$93	\$6,297	\$9,656
Food & Beverage		\$4,258	\$2,258		\$2,258	\$6,516
Exercise Equipment			\$250		\$250	\$250
Bus Transportation		\$3,000				\$3,000
Storage Cabinet				\$4,500	\$4,500	\$4,500
Total Operating Expenses	\$255	\$16,595	\$14,077	\$4,593	\$18,670	\$35,520
HSA #3						10/5/2022