



**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](http://www.SFHSA.org)

**MEMORANDUM**

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** KELLY DEARMAN, EXECUTIVE DIRECTOR

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

**DATE:** JULY 7, 2021

**SUBJECT:** NEW GRANTS: **SELF-HELP FOR THE ELDERLY (NON-PROFIT) FOR PROVISION OF SHORT-TERM HOME CARE FOR OLDER ADULTS: PERSONAL CARE, CHORE AND HOMEMAKER SERVICES**

**GRANT TERM:** 7/1/2021 – 6/30/2025

**GRANT AMOUNT:**

<u>New</u>	<u>Contingency</u>	<u>Total</u>
\$468,716	\$46,871	\$515,587

**ANNUAL AMOUNT:**

<u>FY 21/22</u>	<u>FY 22/23</u>	<u>FY 23/24</u>	<u>FY 24/25</u>
\$117,179	\$117,179	\$117,179	\$117,179

**Funding Source:**

<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
\$187,486		\$281,230	\$46,871	\$515,587
<b>PERCENTAGE:</b> 40%		60%		100%



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with Self Help for the Elderly for the period of July 1, 2021 to June 30, 2025, in an amount of \$468,716 plus a 10% contingency amount for a total amount not to exceed \$515,587. The purpose of these grants is to provide Short-Term Home Care for Older Adults: Personal Care, Homemaker, and Chore program care services to eligible individuals experiencing difficulty in their home with activities of daily living (ADL).



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<b>Service</b>	<b>FY 21-22</b>	<b>FY 22-23</b>	<b>FY 23-24</b>	<b>FY 24-25</b>	<b>Total FY 21-25</b>	<b>10% Contingency</b>	<b>Total Grant Amount FY 21-25</b>
Short-Term Chore Services	\$40,711	\$40,711	\$40,711	\$40,711	\$162,844	\$16,284	\$179,128
Short-Term Homemaker Services	\$40,711	\$40,711	\$40,711	\$40,711	\$162,844	\$16,284	\$179,128
Short-Term Personal Care Services	\$35,757	\$35,757	\$35,757	\$35,757	\$143,028	\$14,303	\$157,331
<b>Total</b>	<b>\$117,179</b>	<b>\$117,179</b>	<b>\$117,179</b>	<b>\$117,179</b>	<b>\$468,716</b>	<b>\$46,871</b>	<b>\$515,587</b>

### **Background**

Title IIIB of the Older Americans Act provides funding for a series of supportive services programs, which includes chore, homemaker, and personal care services. Title IIIB services are designed to address functional limitations in older adults with a goal of maintaining health and independence while living at home. Delivery of the chore, homemaker, and personal care services promotes older adults' ability to maintain the highest possible levels of function, participation and dignity in the community.

The Short-Term Home Care for older adults services are to be distinguished from the State of California's In Home Supportive Services (IHSS) program. While at first glance the programs have some similarities, the differences between the two include program authorization and scope (Federal vs State), eligibility criteria, and specific types of services provided.

### **Services to be Provided**

Short-Term Home Care for Older Adults consists of three distinct services: chore, homemaker, and personal care services. The California Department of Aging defines the services as follows:



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Chore Services	Assistance such as heavy housework, yard work or sidewalk and other home maintenance for a person.
Homemaker Services	Assistance such as preparing meals, shopping for personal and household items, managing money, using the telephone or doing light housework.
Personal Care Services	Personal assistance, stand-by assistance, supervision or cues (such as with eating, bathing, toileting, transferring in/out of bed/chair, walking, dressing, grooming).

Grantee will administer all aspects of the program including intake and eligibility determination for clients, scheduling of services, and delivery of services in a professional and effective manner.

For more specific information regarding the services to be provided, please refer to the attached Appendix A, A1, and A2.

**Selection**

Grantee was selected through Request for Proposals #926, which was competitively bid on April 7, 2021.

**Funding**

Funding for these grant agreements is provided by 60% Federal and 40% County General Funds.

**ATTACHMENTS**

**Short-Term Home Care for Older Adults-Chore Services**

Appendix A- Services to be Provided by Grantee

Appendix B- Program Budget

**Short-Term Home Care for Older Adults-Homemaker Services**

Appendix A1- Services to be Provided by Grantee

Appendix B1- Program Budget

**Short-Term Home Care for Older Adults- Personal Care Services**

Appendix A2- Services to be Provided by Grantee

Appendix B2- Program Budget

**APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**  
**Effective July 1, 2021 to June 30, 2025**  
**SELF-HELP FOR THE ELDERLY**  
**SHORT-TERM HOME CARE FOR OLDER ADULTS:**  
**CHORE SERVICES**

**I. Purpose**

The purpose of this grant is to provide short-term chore services to those eligible individuals experiencing difficulty in their home with activities of daily living (ADL's), when discharged from a hospital or institution, or individuals in the process of applying for the state In-Home Supportive Services (IHSS) program. This service is designed to promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

**II. Definitions**

Adult with a Disability	Person 18-59 years of age living with a disability.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service 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	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Self-Help for the Elderly
HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 100% 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.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with Senior
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with Older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee’s Short Term Home Care for Older Adults program and reflected via enrollment in CA GetCare.

### III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need, in particular:

- A. Low-income
- B. Non or limited –English speaking
- C. Minority
- D. Frail
- E. Lesbian/Gay/Bisexual/Transgender

### IV. Client Eligibility

To be eligible for services, clients must be:

- A. An older adult aged 60 years or older and
- B. A resident of San Francisco and
- C. In need of short-term chore services

### V. Location and Time of Services

Intake and program administration take place during regular business hours at Self-Help for the Elderly offices located at 601 Jackson Street in San Francisco. Program services will occur at client residences as scheduled.

**VI. Description of Services**

The Grantee is to hire, train and place care workers to provide chore services to eligible consumers. Chore services include assistance such as heavy housework, yard work or sidewalk and other home maintenance for a person.

**VII. Contractor Responsibilities**

On an annual basis, the Grantee will provide chore services to the indicated number of consumers with the indicated number of units of service. Chore services should be designed to:

- A. Provide quality services that attain a high level of satisfaction from participants
- B. Provide services that meet the needs of the participants
- C. Provide assistance that ensures well-being and health
- D. Provide information and referral as needed

Grantee will administer an annual consumer survey, pre-approved by Office of Community Partnership staff, to consumers with a response rate of **at least 50%** of the annual unduplicated consumer service objective as specified in the Service Objective section below.

**VIII. Units of Service and Definitions**

On an annual basis, the Grantee will provide the following services as part of the Short-Term Home Care for Older Adults Chore Services:

- A. Unduplicated Consumers. Grantee will provide service to unduplicated consumers that consist of program participants.

UNIT: One unduplicated consumer.

- B. Service Hours. Utilization of care workers to provide program services. Service hours shall include time spent providing services to program participants.

UNIT: One hour of service

**VIII. Service Objectives**

On an annual basis:

- A. Grantee will serve **75** unduplicated consumers.
- B. Grantee will provide **520** units of chore service as described above.

**IX. Outcome Objectives**

At least 35% of consumers will return the annual consumer satisfaction survey.

Client Survey Outcomes

- A. At least 85% of consumers surveyed will report that they are satisfied (or better) with the services provided.
- B. At least 85% of the consumers surveyed will report that they received the services that they need to remain at home.

Performance Outcomes

- A. At least 95% of consumers will receive services within a one hour window of the scheduled time
- B. At least 85% of consumers will receive services within a 48 hour time period from initial intake

- C. At least 75% of the consumers served by the program will need assistance in performing at least two ADLs\*. (\*To be determined by consumer information entered into the CA GetCare system.)

**X. Reporting Requirements**

- A. Grantee will provide various reports during the term of the grant agreement.
  - B. The Grantee will enter consumers' data into the CA GetCare database system.
  - C. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5<sup>th</sup> working day of the month for the preceding month.
  - D. 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.
  - E. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
  - F. Grantee will submit response rates and aggregated data from annual client survey to assigned Office of Community Partnerships staff by March 15<sup>th</sup> of each grant year.
  - G. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
  - H. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
  - I. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10<sup>th</sup>.
  - J. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
  - K. 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.
- A. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Tahir Shaikh  
Contracts Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120  
tahir.shaikh@sfgov.org

Paulo Salta  
DAS, Office of Community Partnerships  
P.O. Box 7988  
San Francisco, CA 94120  
Paulo.Salta@sfgov.org

**XI. Monitoring Activities**

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

- 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, and HIPAA compliance.



**APPENDIX A1 – SERVICES TO BE PROVIDED BY GRANTEE**  
**Effective July 1, 2021 to June 30, 2025**  
**SELF-HELP FOR THE ELDERLY**  
**SHORT-TERM HOME CARE FOR OLDER ADULTS:**  
**HOMEMAKER SERVICES**

**I. Purpose**

The purpose of this grant is to provide short-term homemaker services to those eligible individuals experiencing difficulty in their home with activities of daily living (ADL's), when discharged from a hospital or institution, or individuals in the process of applying for the state In-Home Supportive Services (IHSS) program. This service is designed to promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

**II. Definitions**

Adult with a Disability	Person 18-59 years of age living with a disability.
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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	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
Grantee	Self-Help for the Elderly
HSA	Human Services Agency of the City and County of San Francisco
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 100% 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.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with Senior
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with Older adult
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Short Term Home Care for Older Adults program and reflected via enrollment in CA GetCare.

### III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need, in particular:

- A. Low-income
- B. Non or limited –English speaking
- C. Minority
- D. Frail
- E. Lesbian/Gay/Bisexual/Transgender

### IV. Client Eligibility

To be eligible for services, clients must be:

- A. An older adult aged 60 years or older and
- B. A resident of San Francisco and
- C. In need of short-term homemaker services

### V. Location and Time of Services

Intake and program administration take place during regular business hours at Self-Help for the Elderly offices located at 601 Jackson Street in San Francisco. Program services will occur at client residences as scheduled.

**VI. Description of Services**

The Grantee is to hire, train and place care workers to provide homemaker services to eligible consumers. Homemaker services includes provision of assistance such as preparing meals, shopping for personal and household items, managing money, using the telephone or doing light housework.

**VII. Contractor Responsibilities**

On an annual basis, the Grantee will provide homemaker service to the indicated number of consumers with the indicated number of units of service. Homemaker services should be designed to:

- A. Provide quality services that attain a high level of satisfaction from participants
- B. Provide services that meet the needs of the participants
- C. Provide assistance that ensures well-being and health
- D. Provide information and referral as needed

Grantee will administer an annual consumer survey, pre-approved by Office of Community Partnership staff, to consumers with a response rate of at least 50% of the annual unduplicated consumer service objective as specified in the Service Objective section below.

**VIII. Units of Service and Definitions**

On an annual basis, the Grantee will provide the following services as part of the Short-Term Home Care for Older Adults Homecare Services:

- A. Unduplicated Consumers. Grantee will provide service to unduplicated consumers that consist of program participants.

UNIT: One unduplicated consumer.

- B. Service Hours. Utilization of care workers to provide program services. Service hours shall include: time spent providing services to program participants

UNIT: One hour of service

**VIII. Service Objectives**

On an annual basis:

- A. Grantee will serve 75 unduplicated consumers.
- B. Grantee will provide 520 units of homemaker services as described above.

**IX. Outcome Objectives**

At least 35% of consumers will return the annual consumer satisfaction survey.

Client Survey Outcomes

- A. At least eighty-five percent (85%) of consumers surveyed will report that they are satisfied (or better) with the services provided.
- B. At least eighty-five percent (85%) of the consumers surveyed will report that they received the services that they need to remain at home.

Performance Outcomes

- C. At least 95% of consumers will receive services within a one hour window of their scheduled time

- D. At least 85% of consumers will receive services within a 48 hour time period from initial intake
- E. At least 75% of the consumers served by the program will need assistance in performing at least two ADLs\*. (\*To be determined via consumer information entered into the CA GetCare system.)

**X. Reporting Requirements**

- A. Grantee will provide various reports during the term of the grant agreement.
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  - E. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
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  - I. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
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tahir.shaikh@sfgov.org

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**XI. Monitoring Activities**

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

- 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, and HIPAA compliance.

**APPENDIX A2 – SERVICES TO BE PROVIDED BY GRANTEE**  
**Effective July 1, 2021 to June 30, 2025**  
**SELF-HELP FOR THE ELDERLY**  
**SHORT TERM HOME CARE FOR OLDER ADULTS:**  
**PERSONAL CARE SERVICES**

**I. Purpose**

The purpose of this grant is to provide short-term personal care services to those eligible individuals experiencing difficulty in their home with activities of daily living (ADL's), when discharged from a hospital or institution, or individuals in the process of applying for the state In-Home Supportive Services (IHSS) program. This service is designed to promote older adults' ability to maintain the highest possible levels of function, participation, and dignity in the community.

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Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.
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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.
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- C. Minority
- D. Frail
- E. Lesbian/Gay/Bisexual/Transgender

### IV. Client Eligibility

To be eligible for services, clients must be:

- A. An older adult aged 60 years or older and
- B. A resident of San Francisco and
- C. In need of short-term personal care services

### V. Location and Time of Services

Intake and program administration take place during regular business hours at Self-Help for the Elderly offices located at 601 Jackson Street in San Francisco. Program services will occur at client residences as scheduled.

### VI. Description of Services

The Grantee is to hire, train, and place care workers to provide personal care service to the eligible consumers. Personal care services includes provision of personal assistance, stand-by assistance,

supervision or cues (such as with eating, bathing, toileting, transferring in/out of bed/chair, walking, dressing, grooming).

**VII. Contractor Responsibilities**

On an annual basis, the Grantee will provide personal care service to the indicated number of consumers with the indicated number of units of service. Personal care services should be designed to:

- A. Provide quality services that attain a high level of satisfaction from participants
- B. Provide services that meet the needs of the participants
- C. Provide assistance that ensures well-being and health
- D. Provide information and referral as needed

Grantee will administer an annual consumer survey, pre-approved by Office of Community Partnership staff, to consumers with a response rate of at least 50% of the annual unduplicated consumer service objective as specified in the Service Objective section below.

**VIII. Units of Service and Definitions**

On an annual basis, the Grantee will provide the following services as part of the Short-Term Homecare for Older Adults Personal Care Services:

- A. Unduplicated Consumers. Grantee will provide service to unduplicated consumers that consist of program participants.

UNIT: One unduplicated consumer.

- B. Service Hours. Utilization of care workers to provide program services. Service hours shall include time spent providing services to program participants.

UNIT: One hour of service

**VIII. Service Objectives**

On an annual basis:

- A. Grantee will serve 65 unduplicated consumers.
- B. Grantee will provide 460 units of personal care services as described above.

**IX. Outcome Objectives**

At least 35% of consumers will return the annual consumer satisfaction survey.

Client Survey Outcomes

- A. At least 85% of consumers surveyed will report that they are satisfied (or better) with the services provided.
- B. At least 85% of the consumers surveyed will report that they received the services that they need to remain at home.

Performance Outcomes

- C. At least 95% of consumers will receive services within a one hour window of their scheduled time
- D. At least 85% of consumers will receive services within a 48 hour time period from initial intake



- E. At least 75% of the consumers served by the program will need assistance in performing at least two ADLs\*. (\*To be determined via consumer information entered into the CA GetCare system.)

**X. Reporting Requirements**

- A. Grantee will provide various reports during the term of the grant agreement.
  - B. The Grantee will enter consumers' data into the CA GetCare database system.
  - C. The Grantee will enter into the CA GetCare Service Unit section all the units of service by the 5<sup>th</sup> working day of the month for the preceding month.
  - D. 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.
  - E. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
  - F. Grantee will submit response rates and aggregated data from annual client survey to assigned Office of Community Partnerships staff by March 15<sup>th</sup> of each grant year.
  - G. Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
  - H. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
  - I. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10<sup>th</sup>.
  - J. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
  - K. 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.
- A. Apart from reports to be sent via email to the Program Analyst and/or Contract Manager, all other reports and communications should be sent to the following addresses:

Tahir Shaikh  
Contracts Manager/HSA  
P.O. Box 7988  
San Francisco, CA 94120  
tahir.shaikh@sfgov.org

Paulo Salta  
DAS, Office of Community Partnerships  
P.O. Box 7988  
San Francisco, CA 94120  
Paulo.Salta@sfgov.org

**XI. Monitoring Activities**

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

- 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, and HIPAA compliance.

	A	B	C	D	E	F
1						Appendix B, Page 1
2						Date: 4/25/2021
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name		Term			
6	<b>SELF-HELP FOR THE ELDERLY</b>		7/1/21-6/30/25			
7	(Check One)    New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	<b>Program: SHORT TERM HOME CARE-CHORE</b>					
10	Budget Reference Page No.(s)					Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/24-6/30/25	7/1/21-6/30/25
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$33,454	\$33,454	\$33,454	\$33,454	\$133,816
14	Operating Expenses	\$1,947	\$1,947	\$1,947	\$1,947	\$7,788
15	<b>Subtotal</b>	<b>\$35,401</b>	<b>\$35,401</b>	<b>\$35,401</b>	<b>\$35,401</b>	<b>\$141,604</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$5,310	\$5,310	\$5,310	\$5,310	\$21,240
18	Subcontractor/Capital Expenditures					
19	<b>Total Expenditures</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$162,844</b>
20	<b>HSA Revenues</b>					
21	General Fund	\$40,711	\$40,711	\$40,711	\$40,711	\$162,844
22						
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$162,844</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	<b>Total Revenues</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$162,844</b>
37	Full Time Equivalent (FTE)					
39	Prepared by:    Leny Nair	Telephone No.:	415-677-7682			4/25/2021
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>6/20/2018</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2	Date: 4/25/21									
3	<b>SELF-HELP FOR THE ELDERLY</b>									
4	<b>Program: SHORT TERM HOME CARE-CHORE</b>									
5										
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10										
11		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/24-6/30/25	7/1/21-6/30/25
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Elder Care Worker	\$41,184	1.00	35%	0.35	\$14,311	\$14,311	\$14,311	\$14,311	\$57,244
14	Elder Care Worker-On Cal;	\$35,464	1.00	5%	0.05	\$1,844	\$1,844	\$1,844	\$1,844	\$7,376
15	Program Assistant	\$42,203	1.00	17%	0.17	\$7,331	\$7,331	\$7,331	\$7,331	\$29,324
16	social Service Director	\$94,314	1.00	3%	0.03	\$3,277	\$3,277	\$3,277	\$3,277	\$13,108
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$213,165	4.00	61%	0.61	\$26,763	\$26,763	\$26,763	\$26,763	\$107,052
31										
32	FRINGE BENEFIT RATE	25%								
33	EMPLOYEE FRINGE BENEFITS	\$53,291				\$6,691	\$6,691	\$6,691	\$6,691	\$26,764
34										
35										
36	TOTAL SALARIES & BENEFITS	\$266,456				\$33,454	\$33,454	\$33,454	\$33,454	\$133,816
37	HSA #2									6/20/2018

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1														Appendix B, Page 3
2														Date: 4/25/21
3	<b>SELF-HELP FOR THE ELDERLY</b>													
4	<b>Program: SHORT TERM HOME CARE-CHORE</b>													
5														
6														
7	<b>Operating Expense Detail</b>													
8														
9														
10														
11														
12	<u>Expenditure Category</u>			TERM	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>	<u>7/1/24-6/30/25</u>						TOTAL 7/1/21-6/30/25
13	Rental of Property													
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$311	\$311	\$311	\$311						\$1,244
15	Office Supplies, Postage				\$536	\$536	\$536	\$536						\$2,144
16	Building Maintenance Supplies and Repair													
17	Printing and Reproduction													
18	Insurance				\$300	\$300	\$300	\$300						\$1,200
19	Staff Training													
20	Staff Travel-(Local & Out of Town)				\$300	\$300	\$300	\$300						\$1,200
21	Rental of Equipment													
22														
23	<b>CONSULTANTS</b>													
24														
25														
26														
27	<b>OTHER</b>													
28	Program Supplies-PPE				\$500	\$500	\$500	\$500						\$2,000
29														
30														
31	<b>TOTAL OPERATING EXPENSE</b>				<b>\$ 1,947</b>	<b>\$ 1,947</b>	<b>\$ 1,947</b>	<b>\$ 1,947</b>						<b>\$7,788</b>
32														
33	<b>HSA #3</b>													<b>6/20/2018</b>

	A	B	C	D	E	F
1						Appendix B1, Page 1
2						4/25/2021
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name		Term			
6	<b>SELF-HELP FOR THE ELDERLY</b>		7/1/21-6/30/25			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	<b>Program: SHORT TERM CARE-HOMEMAKER</b>					
10	Budget Reference Page No.(s)					Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/24-6/30/25	7/1/21-6/30/25
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$33,454	\$33,454	\$33,454	\$33,454	\$133,816
14	Operating Expenses	\$1,947	\$1,947	\$1,947	\$1,947	\$7,788
15	Subtotal	\$35,401	\$35,401	\$35,401	\$35,401	\$141,604
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17	Indirect Cost (Line 16 X Line 15)	\$5,310	\$5,310	\$5,310	\$5,310	\$21,240
18	Subcontractor/Capital Expenditures					
19	<b>Total Expenditures</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$162,844</b>
20	<b>HSA Revenues</b>					
21	General Fund	\$40,711	\$40,711	\$40,711	\$40,711	\$162,844
22						
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$40,711</b>	<b>\$162,844</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues	\$40,711	\$40,711	\$40,711	\$40,711	\$162,844
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair	Telephone No.:	415-677-7682	4/25/2021		
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>6/20/2018</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B1, Page 2									
2	Date: 4/25/21									
3	<b>SELF-HELP FOR THE ELDERLY</b>									
4	<b>Program: SHORT TERM CARE-HOMEMAKER</b>									
5										
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10										
11		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/24-6/30/25	7/1/21-6/30/25
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Elder Care Worker	\$41,184	1.00	35%	0.35	\$14,311	\$14,311	\$14,311	\$14,311	\$57,244
14	Elder Care Worker-On Cal;	\$35,464	1.00	5%	0.05	\$1,844	\$1,844	\$1,844	\$1,844	\$7,376
15	Program Assistant	\$42,203	1.00	17%	0.17	\$7,331	\$7,331	\$7,331	\$7,331	\$29,324
16	social Service Director	\$94,314	1.00	3%	0.03	\$3,277	\$3,277	\$3,277	\$3,277	\$13,108
17										
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25										
26										
27										
28										
29										
30	TOTALS	\$213,165	4.00	61%	0.61	\$26,763	\$26,763	\$26,763	\$26,763	\$107,052
31										
32	FRINGE BENEFIT RATE	25%								
33	EMPLOYEE FRINGE BENEFITS	\$53,291				\$6,691	\$6,691	\$6,691	\$6,691	\$26,764
34										
35										
36	TOTAL SALARIES & BENEFITS	\$266,456				\$33,454	\$33,454	\$33,454	\$33,454	\$133,816
37	HSA #2									6/20/2018

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Appendix B1, Page 3													
2														
3	<b>SELF-HELP FOR THE ELDERLY</b>													
4	<b>Program: SHORT TERM CARE-HOMEMAKER</b>													
5														
6														
7	<b>Operating Expense Detail</b>													
8														
9														
10														
11	TOTAL													
12	<u>Expenditure Category</u>			TERM	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>	<u>7/1/24-6/30/25</u>	<u>7/1/21-6/30/25</u>					
13	Rental of Property													
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$311	\$311	\$311	\$311	\$311					\$1,244
15	Office Supplies, Postage				\$536	\$536	\$536	\$536	\$536					\$2,144
16	Building Maintenance Supplies and Repair													
17	Printing and Reproduction													
18	Insurance				\$300	\$300	\$300	\$300	\$300					\$1,200
19	Staff Training													
20	Staff Travel-(Local & Out of Town)				\$300	\$300	\$300	\$300	\$300					\$1,200
21	Rental of Equipment													
22														
23	<b>CONSULTANTS</b>													
24														
25														
26														
27	<b>OTHER</b>													
28	Program Supplies-PPE				\$500	\$500	\$500	\$500	\$500					\$2,000
29														
30														
31	<b>TOTAL OPERATING EXPENSE</b>				<b><u>\$1,947</u></b>	<b><u>\$1,947</u></b>	<b><u>\$1,947</u></b>	<b><u>\$1,947</u></b>	<b><u>\$1,947</u></b>					<b><u>\$7,788</u></b>
32														
33	<b>HSA #3</b>													<b>6/20/2018</b>



	A	B	C	D	E	F
1						Appendix B2, Page 1
2						Date: 4/25/21
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name		Term			
6	<b>SELF-HELP FOR THE ELDERLY</b>		7/1/21-6/30/25			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	<b>Program: SHORT TERM CARE-PERSONAL CARE</b>					
10	Budget Reference Page No.(s)					Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/24-6/30/25	7/1/21-6/30/25
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$29,574	\$29,574	\$29,574	\$29,574	\$118,296
14	Operating Expenses	\$1,519	\$1,519	\$1,519	\$1,519	\$6,076
15	<b>Subtotal</b>	<b>\$31,093</b>	<b>\$31,093</b>	<b>\$31,093</b>	<b>\$31,093</b>	<b>\$124,372</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$4,664	\$4,664	\$4,664	\$4,664	\$18,656
18	Subcontractor/Capital Expenditures					
19	<b>Total Expenditures</b>	<b>\$35,757</b>	<b>\$35,757</b>	<b>\$35,757</b>	<b>\$35,757</b>	<b>\$143,028</b>
20	<b>HSA Revenues</b>					
21	General Fund	\$35,757	\$35,757	\$35,757	\$35,757	\$143,028
22						
23						
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	<b>\$35,757</b>	<b>\$35,757</b>	<b>\$35,757</b>	<b>\$35,757</b>	<b>\$143,028</b>
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	<b>Total Revenues</b>	<b>\$35,757</b>	<b>\$35,757</b>	<b>\$35,757</b>	<b>\$35,757</b>	<b>\$143,028</b>
37	Full Time Equivalent (FTE)					
39	Prepared by: Leny Nair		Telephone No.: 415-677-7682			
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>6/20/2018</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B2, Page 2									
2	Date: 4/25/21									
3	<b>SELF-HELP FOR THE ELDERLY</b>									
4	<b>Program: SHORT TERM CARE-PERSONAL CARE</b>									
5										
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10										
11		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/24-6/30/25	7/1/21-6/30/25
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Elder Care Worker	\$41,184	1.00	31%	0.31	\$12,569	\$12,569	\$12,569	\$12,569	\$50,276
14	Elder Care Worker-On Cal;	\$35,464	1.00	5%	0.05	\$1,773	\$1,773	\$1,773	\$1,773	\$7,092
15	Program Assistant	\$42,203	1.00	15%	0.15	\$6,440	\$6,440	\$6,440	\$6,440	\$25,760
16	social Service Director	\$94,314	1.00	3%	0.03	\$2,877	\$2,877	\$2,877	\$2,877	\$11,508
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$213,165	4.00	54%	0.54	\$23,659	\$23,659	\$23,659	\$23,659	\$94,636
31										
32	FRINGE BENEFIT RATE	25%								
33	EMPLOYEE FRINGE BENEFITS	\$53,291				\$5,915	\$5,915	\$5,915	\$5,915	\$23,660
34										
35										
36	TOTAL SALARIES & BENEFITS	\$266,456				\$29,574	\$29,574	\$29,574	\$29,574	\$118,296
37	HSA #2									6/20/2018

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1														Appendix B2, Page 3
2														Date: 4/25/21
3	<b>SELF-HELP FOR THE ELDERLY</b>													
4	<b>Program: SHORT TERM CARE-PERSONAL CARE</b>													
5														
6														
7	<b>Operating Expense Detail</b>													
8														
9														
10														
11														
12	<u>Expenditure Category</u>				<u>TERM</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>	<u>7/1/24-6/30/25</u>					<u>TOTAL</u> <u>7/1/21-6/30/25</u>
13	Rental of Property													
14	Utilities(Elec, Water, Gas, Phone, Garbage)					\$300	\$300	\$300	\$300					\$1,200
15	Office Supplies, Postage					\$219	\$219	\$219	\$219					\$876
16	Building Maintenance Supplies and Repair													
17	Printing and Reproduction													
18	Insurance					\$300	\$300	\$300	\$300					\$1,200
19	Staff Training													
20	Staff Travel-(Local & Out of Town)					\$300	\$300	\$300	\$300					\$1,200
21	Rental of Equipment													
22														
23	<b>CONSULTANTS</b>													
24														
25														
26														
27	<b>OTHER</b>													
28	Program Supplies-PPE					\$400	\$400	\$400	\$400					\$1,600
29														
30														
31	<b>TOTAL OPERATING EXPENSE</b>					<b>\$1,519</b>	<b>\$1,519</b>	<b>\$1,519</b>	<b>\$1,519</b>					\$6,076
32														
33	<b>HSA #3</b>													<b>6/20/2018</b>