



**MEMORANDUM**

TO: AGING AND ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: MELISSA MCGEE, DEPUTY DIRECTOR  
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

DATE: OCTOBER 5, 2016

SUBJECT: GRANT MODIFICATION: ON LOK DAY SERVICES (NON-PROFIT):  
COMMUNITY SERVICES

	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
GRANT TERM:	7/1/13- 6/30/18	7/1/16 – 6/30/18	7/1/13- 6/30/18		
TOTAL GRANT AMOUNT:	\$1,590,748	\$50,000	\$1,640,748	\$164,075	\$1,804,823
ANNUAL AMOUNT:	<u>FY13/14</u>	<u>FY14/15</u>	<u>FY15/16</u>	<u>FY16/17</u>	<u>FY17/18</u>
	\$272,050	\$299,902	\$305,182	\$381,807	\$381,807
Funding Source MODIFICATION FUNDING:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
PERCENTAGE:	\$50,000	\$0	\$0	\$164,075	\$214,075
	100%	0%	0%		100%

The Department of Aging and Adult Services (DAAS) requests authorization to modify the existing grant with On Lok Day Services for the provision of an anti-bullying education pilot program for the period of July 1, 2016 to June 30, 2018, in an additional amount of \$50,000 plus a 10% contingency for a new grant amount not to exceed \$1,804,823. The purpose of this modification is to fund the creation of an “Enhancing Healthy Relationships” curriculum that will test and establish protocols for a senior bullying prevention training.

**Background**

Senior Centers are experiencing an increase in behavioral incidents among participants. At On Lok Day Services’ 30<sup>th</sup> Street Senior Center alone, staff has intervened in at least 15 cases of seniors bullying other seniors during the past year, sometimes having to issue temporary

suspensions of service to the offenders. These suspensions, intended to maintain safety for both seniors and staff in the community center, do not solve the endemic issue of bullying, and the offending individuals sometimes carry their behavior to other senior centers. At a recent Coalition of agencies serving the Elderly (CASE) membership training, "Recognizing and Responding to Bullying Behavior in Older Adults", nearly all CASE members indicated that they had witnessed and/or been on the receiving end of bullying by seniors.

**Services to be Provided**

The modification will provide for the design, implementation, evaluation and possible replication of a program to stop bullying by other seniors within senior centers, using input from the staff and consumer population of the 30<sup>th</sup> Street Community Services program. This educational approach will raise awareness of bullying among seniors, and instruct individuals on the techniques of mitigating the harmful effects of bullying as much as possible. These efforts will help maintain a safe Senior Center space for staff, volunteers and seniors.

During the 16/17 and 17/18 fiscal years, this modification funding will result in a series of focus groups aimed towards collecting and analyzing the perspectives of seniors who have experienced bullying behavior. These focus groups will help inform a training regimen that will be administered in nine sessions to both Senior Center staff and consumers, with the intention of instructing the participants to identify and appropriately respond to instances of bullying. Grantee will then submit its training model proposal to the American Society on Aging for possible program replication across other Senior Centers.

For additional information regarding this proposed initiative, please see the attached Scope of Services.

**Selection**

Grantee was selected for funding of Community Services through NOFA #531, issued in December of 2012.

**Funding**

Funding for this modification will be supported entirely by General Fund dollars. The modification funding will primarily cover consultant training and project coordinating staff, as well as smaller expenses related to translation, printing, and office supplies.

**Attachments**

- Appendix A-5, Scope of Services
- Appendix B-5, Budget

**APPENDIX A-5 – SERVICES TO BE PROVIDED BY GRANTEE**  
**Effective July 1, 2013 to June 30, 2018**  
**On Lok Day Services**  
**Community Services**

**I. Purpose**

The purpose of this grant is to maintain or improve the well being of seniors through the provision of a variety of services and activities in activity centers/senior centers.

**II. Definitions**

City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
Grantee	On Lok Day Services
HSA	Human Services Agency of the City and County of San Francisco
OCM	Office of Contract Management, Human Services Agency
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent.
DAAS	Department of Aging and Adult Services
OOA	Office on the Aging
Senior	Person who is 60 years or older
Adult with Disability	Person 18 years of age or older living with a disability
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, 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 older individual behaves in a manner that poses a serious health or safety hazard to the individual or others.

Activity Scheduling	This is one of four service categories within Community Services. Service units are captured by the number of scheduled activity hours sponsored by the Activity/Senior Centers. 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 that help consumers maintain/enhance their level of functioning.
Translation	This is one of four service categories within Community Services. Service units are captured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, Braille, or Teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements , presentations, etc.
Social Services/Other	This is one of the four service categories within Community 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, medical escort services, and emotional support by phone or in person.
Enhanced Outreach	This is one of four service categories within Community Services. Service units are captured by providing more formal outreach efforts and enhanced services to support the outreach efforts. 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.
Unit of Service	Defined as one hour of service
Low Income	Having income at or below 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.
CARBON	Contracts Administration, Reporting and Billing On Line System
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.

### **III. Target Population**

This grant will serve seniors (age 60 and over) and/or adults age 18-59 with disabilities who reside in the City and County of San Francisco with one or more of the following target priorities:

1. Low-income
2. Non or limited English speaking
3. Minority
4. Frail
5. Lesbian/Gay/Bisexual/Transgender

### **IV. Eligibility for Community Services**

- Persons aged 60 and above
- Persons 18 years of age or older living with a disability

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

The On Lok Day Services is located at the 30<sup>th</sup> St. Senior Center, 225 30<sup>th</sup> St., San Francisco, CA 94131. The Center is open Monday through Saturday, 8:30 a.m. to 5:00 p.m.

### **VI. Services Description**

Community Services consist of activities/services that focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. Such services are provided in the agency's community center and in the community.

There are three main categories of services: Activity Scheduling, Translation and Social Services/Other. There is also an expectation that activity/senior centers will do a reasonable amount of outreach within their existing Community Service budgets, and some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Services should be provided according to OOA Community Services Standards.

### **VII. Contractor Responsibilities**

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual.
- Provide physical activities that may increase the health of participants.
- Increase access to informational and educational presentations that enable individuals to maintain independent living.
- Provide activities to increase socialization opportunities for individuals.
- Prepare and implement an "Enhancing Healthy Relationships" training program to curtail bullying by seniors within Senior Centers.

### **VIII. Service Objectives**

On an annual basis:

- Grantee will serve 1,500 unduplicated consumers seniors and younger adults with disabilities.
- Grantee will provide 8,100 units of service of scheduled activities at a center or venues approved by the Office on the Aging.

- Grantee will provide 2,060 units of service of translation services.
- Grantee will provide 1,800 units of service of social services.
- During the fiscal years of 2016-18, Grantee will provide 150 units of Enhanced Outreach to develop and implement an ‘Enhancing Healthy Relationships’ (bullying prevention curriculum) series of trainings to solve barriers to Community Services/Senior Center access, and issues of consumer safety.
- 2016-17 Service Objectives for Enhancing Healthy Relationships series:
  - Grantee will conduct five focus groups with seniors.
  - Grantee will develop a training curriculum based on empirical research and the results of the focus groups.
  - Grantee will conduct nine trainings for 30<sup>th</sup> Street Senior Center staff, and one training for OOA staff.
- 2017-2018 Service Objectives for Enhancing Healthy Relationships series:
  - Grantee will conduct nine monthly training sessions to Senior Center participants.
  - Grantee will draft report on 30<sup>th</sup> Street experience on being program crucible/testing ground.
  - Grantee will submit proposal to the American Society on Aging.

**IX. Outcome Objectives**

- At least 85% of participants surveyed will indicate excellent or good in rating the quality of services they receive.
- At least 85% of participants surveyed will indicate that they receive the services and/or activities they need from the agency.
- At least 80% of participants surveyed who participate in one or more physical activities will report feeling more healthy due to participation.
- At least 80% of participants surveyed who participate in one or more informational/educational presentations will report they receive information to help them maintain independent living.
- At least 85% or more of participants surveyed will report that center activities increase their socialization opportunities and interaction with others.
- 2016-17 Outcome Objectives for Enhancing Healthy Relationships series:
  - At least 85% of staff who complete training will indicate that they recognize bullying behaviors and can intervene for positive results.
- 2017-2018 Outcome Objectives for Enhancing Healthy Relationships series:
  - At least 85% of consumers who complete the training sessions state they are better able to identify and respond confidently to bullying behavior.
  - At least 85% of staff and consumers who complete the training sessions will report feeling safer at the 30<sup>th</sup> Street Senior Center as a result of the trainings.

**X. Reporting and Other Requirements**

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





- A. The grantee will enter into the CA Getcare -consumers' data in the Community Services module.
- B. The grantee will enter into the CA Getcare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- C. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the following:
  - 1. Number of unduplicated consumers served during the month.
  - 2. Number of units of service of scheduled activities at an activity/senior center or venues approved by the Office on the Aging provided during the month.
  - 3. Number of units of translation services provided during the month.
  - 4. Number of units of social services provided during the month.
  - 5. Number of units of Enhanced Outreach provided during the month.
- D. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII & VIII- Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis:
  - The percentage of participants surveyed that have indicated excellent or good in rating the quality of services they received.
  - The percentage of participants surveyed that have indicated they have received the services and/or activities they needed from the agency.
  - The percentage of participants surveyed that have participated in one or more physical activities, have reported feeling healthier due to participation.
  - The percentage of participants surveyed who have participated in one or more informational/educational presentations have reported they have received information to help them maintain independent living.
  - The percentage of participants surveyed reported that center activities have increased their socialization opportunities and interaction with others.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10<sup>th</sup> day following the time study month and shall be entered on line to this website link: <https://sfhsa.hfa3.org/signin>
- F. 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.
- G. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year.
- H. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- I. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Linda Murley, Program Analyst  
 DAAS, Office on the Aging

P.O. Box 7988  
San Francisco, CA 94120  
Linda.Murley@sfgov.org

Justin Chan, Contract Manager, (Worker #GB23)  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120  
Justin.Chan@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; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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.



9

**HUMAN SERVICES AGENCY BUDGET SUMMARY  
BY PROGRAM**

5 Name \_\_\_\_\_ Term 7/1/13-6/30/18

6 On Lok Day Services / 30th Street Senior Center

7 (Check One) New  Renewal  Modification  X  
8 If modification, Effective Date of Mod. July 1, 2016 No. of Mod. 5

9 Program: **Community Services**

10 Budget Reference Page No.(s) \_\_\_\_\_ Total Term

11 Program Term 7/1/13-6/30/14 7/1/14-6/30/15 7/1/15-6/30/16 7/1/16-6/30/17 7/1/17-6/30/18 7/1/13-6/30/18

12 Expenditures

13 Salaries & Benefits \$185,118 \$200,071 \$218,088 \$262,026 \$262,026 \$1,127,328

14 Operating Expense \$65,168 \$75,126 \$61,896 \$88,256 \$88,256 \$376,702

15 Subtotal \$250,286 \$275,197 \$279,984 \$350,282 \$350,282 \$1,506,030

16 Indirect Percentage (%) 8.70% 8.98% 9.00% 9.00% 9.00% 8.95%

17 Indirect Cost (Line 16 X Line 15) \$21,764 \$24,705 \$25,199 \$31,525 \$31,525 \$134,718

18 Capital Expenditure \_\_\_\_\_

19 Total Expenditures \$272,050 \$299,902 \$305,182 \$381,807 \$381,807 \$1,640,748

20 HSA Revenues

21 General Fund \$272,050 \$279,902 \$255,566 \$255,566 \$255,566 \$1,318,650

22 NOFA 618 \_\_\_\_\_ \$20,000 \$20,000 \$20,000 \$20,000 \$80,000

23 Addback #1 \_\_\_\_\_ \$22,727 \$22,727 \$22,727 \$22,727 \$88,181

24 Addback #2 \_\_\_\_\_ \$44,736 \$44,736 \$44,736 \$44,736 \$89,472

25 CODB \_\_\_\_\_ \$13,778 \$13,778 \$13,778 \$13,778 \$34,445

26 Pilot Program - Enhancing Healthy Relationships \$25,000 \$25,000

27 \_\_\_\_\_

28 \_\_\_\_\_

29 TOTAL HSA REVENUES \$272,050 \$299,902 \$305,182 \$381,807 \$381,807 \$1,640,747

30 Other Revenues \_\_\_\_\_

31 \_\_\_\_\_

32 \_\_\_\_\_

33 \_\_\_\_\_

34 \_\_\_\_\_

35 \_\_\_\_\_

36 Total Revenues \$272,050 \$299,902 \$305,182 \$381,807 \$381,807 \$1,640,747

37 Full Time Equivalent (FTE) 3.18 4.13 4.38 4.98 4.98

39 Prepared by: Valorie Villiela - Director Telephone No.: (415) 550-221 9/20/2016

40 HSA-CO Review Signature: \_\_\_\_\_

41 HSA #1 \_\_\_\_\_ 11/15/2007

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

**Salaries & Benefits Detail**

A	B	C	D	E	F	G	H	I	J	K			
											Agency Totals	For HSA Program	Budgeted Salary
1	Accountant	\$43,930	100%	40%	\$17,531	\$17,531	\$17,531	\$17,531	\$17,531	\$17,531	\$17,531	\$17,531	\$87,665
12	Activity Program Manager	\$52,478	100%	75%	\$48,880	\$51,001	\$39,359	\$39,359	\$39,359	\$39,359	\$39,359	\$39,359	\$217,958
13	Administrative Secretary	\$62,504	100%	15%	\$3,835	\$5,000	\$9,376	\$9,376	\$9,376	\$9,376	\$9,376	\$9,376	\$36,963
14	Assistant Director	\$75,005	100%	40%	\$29,404	\$26,404	\$17,501	\$30,002	\$30,002	\$30,002	\$30,002	\$30,002	\$130,313
15	Director	\$131,560	100%	15%	\$8,922	\$9,282	\$19,734	\$19,734	\$19,734	\$19,734	\$19,734	\$19,734	\$77,406
16	Senior Center Associate	\$41,800	100%	100%	\$6,606	\$6,606	\$23,624	\$41,600	\$41,600	\$41,600	\$41,600	\$41,600	\$120,036
17	Hospitality Coordinator	\$35,360	100%	43%	\$12,314	\$12,314	\$15,205	\$15,205	\$15,205	\$15,205	\$15,205	\$15,205	\$70,243
18	Volunteer Program Manager	\$47,008	100%	70%	\$24,960	\$24,960	\$32,906	\$32,906	\$32,906	\$32,906	\$32,906	\$32,906	\$148,638
19	Project Coordinator (JVC Intern)	\$12,526	100%	100%	\$12,526	\$12,526	\$3,424	\$3,424	\$3,424	\$3,424	\$3,424	\$3,424	\$15,950
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30	TOTALS	\$501,971	9.00	4.98	\$149,452	\$165,624	\$178,660	\$205,712	\$205,712	\$205,712	\$205,712	\$205,712	\$905,159
31	FRINGE BENEFIT RATE	22.50%											
32	EMPLOYEE FRINGE BENEFITS	\$112,943			\$35,666	\$34,447	\$39,428	\$56,314	\$56,314	\$56,314	\$56,314	\$56,314	\$222,169
33	TOTAL SALARIES & BENEFITS	\$614,914			\$185,118	\$200,071	\$218,088	\$262,026	\$262,026	\$262,026	\$262,026	\$262,026	\$1,127,328
34	HSA #2												\$114,520



Operating Expense Detail

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1															
2															
3															
4	Program Name:														
5	(Same as Line 9 on HSA #1)														
6															
7															
8															
9															
10															
11															
12	Expenditure Category			TERM	7/1/13-6/30/14		7/1/14-6/30/15		7/1/15-6/30/16		7/1/16-6/30/17		7/1/17-6/30/18		TOTAL
13	Rental of Property														7/1/13-6/30/18
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$14,812		\$25,168		\$15,168		\$15,168		\$15,168		\$85,484
15	Office Supplies, Postage								\$1,086		\$1,086		\$1,086		\$2,172
16	Building Maintenance Supplies and Repair				\$31,956		\$44,084		\$31,752		\$31,752		\$31,752		\$171,296
17	Printing and Reproduction										\$2,800		\$2,800		\$5,600
18	Insurance														
19	Staff Training														
20	Staff Travel-(Local & Out of Town)														
21	Rental of Equipment														
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE														
23	JVC Administration						\$5,874		\$14,976		\$18,400		\$18,400		\$57,650
24	Curriculum & Training Consultant									\$10,650		\$10,650		\$21,300	
25	Project Coordinator									\$4,200		\$4,200		\$8,400	
26	Clinical Consultant									\$3,200		\$3,200		\$6,400	
27															
28	OTHER - OTO														
29	Contractual - Elevator				\$5,159										\$5,159
30	Maintenance & Repair				\$2,810										\$2,810
31	Contractual - Security/Alarm				\$2,743										\$2,743
32	Contractual - HVAC Repair				\$1,712										\$1,712
33	Utilities(Elec, Water, Gas, Scavenger)				\$5,976										\$5,976
34	Translation									\$1,000		\$1,000		\$2,000	
35															
36															
37	TOTAL OPERATING EXPENSE				\$65,168		\$75,126		\$61,896		\$88,256		\$88,256		\$378,702
38															
39	HSA #3														11/15/2007

