



**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)



**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  
EB

**DATE:** DECEMBER 7, 2022

**SUBJECT:** **GRANT MODIFICATION: MULTIPLE GRANTEES  
(NON-PROFIT) FOR PROVISION OF COMMUNITY  
SERVICE PROGRAM TO OLDER ADULTS AND ADULTS  
WITH DISABILITIES**

<b>GRANT TERM:</b>	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
	01/01/2021 – 06/30/2023	07/01/2022 – 06/30/2023			01/01/2021 – 06/30/2023
<b>GRANT AMOUNT:</b>	\$3,643,544	\$575,187	\$4,218,731	\$421,874	\$4,640,605
<b>ANNUAL AMOUNT:</b>	Please see table on page 2				
<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>Funding Percentage</b>	\$4,218,731			\$421,874	\$4,640,605
	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grants with multiple providers for the period of July 1, 2022 through June 30, 2023, in the additional amount of \$575,187 plus a 10% contingency for a revised total amount not to exceed \$4,640,605. The purpose of this modification is to provide additional funding to DAS-funded Community Service program.

**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 Service 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 Service 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.



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Community centers are also the entry point for many older adults and adults with disabilities in need of information, support services, translation, and social services.

### Services to be Provided

Grantees will operate a community center space designed to engage with the surrounding community that is 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 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 \$575,187 to DAS-funded Community Service programs. This modification allocates funding provided through the Board of Supervisors addback process and an annual CODB. Golden Gate Richmond Senior Center and YMCA Richmond will utilize the funds to restore previous funding levels. Curry Senior Center and Openhouse will utilize the funds for program and/or staffing enhancements. A breakdown of funding per grantee is summarized in the following table and more information on each allocation is detailed below.

Vendor	01/01/2021 – 06/30/2021	07/01/2021 – 06/30/2022	07/01/2022 – 06/30/2023	Modification	10% contingency	Not-to- exceed amount
Curry Senior Center	\$191,336	\$518,016	\$418,016	\$116,721	\$124,409	\$1,368,498
Golden Gate Senior Services, Richmond Senior Center	\$208,560	\$458,102	\$335,102	\$163,404	\$116,517	\$1,281,685
Openhouse	\$218,847	\$541,657	\$441,657	\$241,666	\$144,383	\$1,588,210
YMCA, Richmond	\$92,449	\$134,901	\$84,901	\$53,396	\$36,565	\$402,212
	\$711,192	\$1,652,676	\$1,279,676	\$575,187	\$421,874	\$4,640,605

### Curry Senior Center:

The modification will increase funding for the LGBTQ+ Programs Manager to enhance their support for program staff. This position oversees three programs and helps with efficiency around operations and communication between staff



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and programs. The LGBTQ+ Programs Manager does not provide direct services to clients but rather delivers manager level program planning and administration that includes organizing quarterly outings and the annual Pride celebration. Due to the funds not going to staff providing direct services, there will not be an increase in service objectives. However, the Appendix A reflects an increase this fiscal year, which is due to the grantee projecting a gradual increase of programming at the start of the contract term.

### Golden Gate Senior Services, Richmond Senior Center:

This modification will restore funding to FY 21/22 levels. Funds will help reopen the center, support indoor congregate activities, and maintain a full-time Bilingual Center Coordinator who is responsible for intakes, managing scheduled activity attendance, and supporting participants with translation and/or social services. The Operations Manager will work on the reopening and establishment of safety protocols for programs and services. The funding will also support outreach efforts, art classes, yoga sessions, and off-site activities that include field trips to local farms and museums. There is no change to service objectives, as this addback will restore Richmond Senior Center's funding levels. However, the Appendix A reflects an increase this fiscal year, which is due to the grantee projecting a gradual increase of programming at the start of the contract term.

### Openhouse:

The modification will provide funding for the Mental Health Support Supervisor. This position provides direct service to participants through individual weekly meetings for therapeutic support. The Mental Health Support Supervisor also plays an integral role in strengthening mental health services that reduce isolation and increase the health and well-being of all LGBTQ+ older adults and adults with disabilities. The remaining addback will also increase the adjusted full-time equivalent (FTE) funding for all other program staff, which includes Activities Coordinator, Volunteer Coordinator, and the Community Engagement Coordinator.

Changes to service objectives due to this modification are as follows:

	FY 22/23 – prior to modification	FY 22/23 – with modification
Unduplicated Consumers (UDC)	400	430
Activity Scheduling	1,300	1,300
Social Services	1,100	1,550
Enhanced Outreach	90	110



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YMCA - Richmond:

This addback will restore funding to FY 21/22 levels. The modification will fund field trips and activities for participants which include travelling to the Oakland Zoo, Monterey Bay Aquarium, Santa Cruz Redwood Train, and YMCA Point Bonita. Additionally, the funds will support the purchasing of exercise equipment and materials for classes/activities at the center. The modification will fund additional staff time for activity leaders (consultants) who lead hiking groups, ceramics classes, and workshops.

Changes to service objectives due to this modification are as follows:

	FY 22/23 – prior to modification	FY 22/23 – with modification
Unduplicated Consumers (UDC)	100	100
Activity Scheduling	480	572
Social Services	75	75

**Selection**

Grantees were selected through Request for Proposal (RFP) #785 issued in February 2018.

**Funding**

These grants are funded through local funds.

**ATTACHMENTS**

Curry Senior Center

Appendix A-2, Scope of Services

Appendix B-2, Budget

Golden Gate Senior Services, Richmond Senior Center

Appendix A-2, Scope of Services

Appendix B-2, Budget

Openhouse

Appendix A-2, Scope of Services

Appendix B-2, Budget

YMCA, Richmond

Appendix A-3, Scope of Services

Appendix B-3, Budget

## Appendix A-2 - Services to be Provided

### Curry Senior Center

### Community Services

**January 1, 2021 to June 30, 2023**

#### 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	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. Source: California Code of Regulations Title 22, Sec. 7119
Grantee	Curry Senior Center
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.
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

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs 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:

In order to better raise community awareness of Curry Senior Center's programs, Curry Senior Center staff will participate in various larger community events including Project Homeless Connect, Community Housing Partnership's Senior



- Brownbag event, Tenderloin Sunday Streets, and other relevant events.
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:

<b>Table A- Community Services</b>	01/01/2021-6/30/2021	FY21/22	FY22/23
Unduplicated Consumers (UDC)	100	300	400
Activity Scheduling	369	1,106	1,475
Translation Services	57	169	225

Social Services	44	131	175
Enhanced Outreach	13	38	50
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

and

Ella Lee  
Contract Manager  
HSA OCM  
Ella.Lee@sfgov.org

## **X. Monitoring Activities**

1. 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.

2. 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		Term				
Curry Senior Center		01/01/2021 - 06/30/2023				
(Check One) New ___ Renewal ___ Modification <input checked="" type="checkbox"/>						
If modification, Effective Date of Mod.		No. of Mod.				
Program: Community services						
Budget Reference Page No.(s)						
	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23			Total
Program Term	Revised	Revised	Budget	Modification	Revised	
<b>Expenditures</b>						
Salaries & Benefits	\$134,856	\$366,152	\$286,705	\$91,754	\$378,459	\$879,467
Operating Expense	\$17,610	\$56,471	\$48,962	\$9,742	\$58,704	\$132,785
<b>Subtotal</b>	\$152,466	\$422,623	\$335,667	\$101,496	\$437,163	\$1,012,252
Indirect Percentage (%)	15%	15%	15%		15%	
Indirect Cost (Line 16 X Line 15)	\$22,870	\$63,393	\$50,349	\$15,225	\$65,574	\$151,837
Capital Expenditure	\$16,000	\$32,000	\$32,000		\$32,000	\$80,000
Total Expenditures	\$191,336	\$518,016	\$418,016	\$116,721	\$534,737	\$1,244,089
<b>HSA Revenues</b>						
General Fund	\$180,506	\$361,011	\$361,011		\$361,011	\$902,528
CODB	\$10,830	\$23,005	\$23,005	\$16,721	\$39,726	\$73,561
LGBT Program Assistant		\$20,500	\$20,500		\$20,500	\$41,000
Transportation		\$13,500	\$13,500		\$13,500	\$27,000
LGBTQ+ Compassionate services		\$100,000				\$100,000
LGBTQ+ staffing				\$100,000	\$100,000	\$100,000
TOTAL HSA REVENUES	\$191,336	\$518,016	\$418,016	\$116,721	\$534,737	\$1,244,089
<b>Other Revenues</b>						
Total DAS and Non DAS Revenue	\$191,336	\$518,016	\$418,016	\$116,721	\$534,737	\$1,244,089
Full Time Equivalent (FTE)						
Prepared by:						Date
HSA-CO Review Signature:						
<b>HSA #1</b>						<b>10/25/2016</b>

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

**Salaries & Benefits Detail**

POSITION TITLE					1/1/21 - 6/30/21					7/1/21 - 6/30/22
	Agency Totals		HSA Program		DAS Program	Agency Totals		HSA Program		DAS Program
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Revised Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Revised Salary
Senior Center Director	\$93,675	1.00	62.57%	0.63	\$29,305	\$104,618	1.00	67.79%	0.68	\$70,921
Manager-Chinese	\$56,550	1.00	17.68%	0.18	\$5,000	\$63,375	1.00	25.32%	0.25	\$16,047
Program Assistant-Lao	\$40,112	0.53	42.07%	0.22	\$4,500	\$41,315	0.53	49.93%	0.27	\$11,001
Program Assistant-Russian	\$40,112	0.67	33.65%	0.22	\$4,500	\$41,315	0.67	39.94%	0.27	\$11,001
Program Assistant-Vietnamese	\$39,000	0.80	28.85%	0.23	\$4,500	\$40,170	0.93	29.34%	0.27	\$11,000
Program Assistant-Vietnamese	\$39,000	0.69	100.00%	0.69	\$13,520	\$40,170	0.69	100.00%	0.69	\$27,851
Program Advocate	\$42,900	1.00	53.05%	0.53	\$11,380	\$42,900	1.00	55.00%	0.55	\$23,595
Program Assistant-Tagalog	\$46,800	0.96	82.82%	0.80	\$18,605	\$48,204	1.00	84.86%	0.85	\$40,906
Program Assistant-LGBT	\$40,950	1.00	56.39%	0.56	\$11,545	\$42,179	1.00	36.69%	0.37	\$15,476
Wellness Program Manager	\$88,725	1.00	5.64%	0.06	\$2,500	\$91,387	1.00	5.47%	0.05	\$5,000
Program Assistant-LGBT				-		\$40,950	0.80	41.86%	0.33	\$13,712
LGBT Program Manager				-		\$60,450	1.00	58.12%	0.58	\$35,134
Program Assistant-Chinese				-					-	
				-					-	
				-					-	
				-					-	
<b>TOTALS</b>	<b>\$527,824</b>	<b>8.65</b>	<b>483%</b>	<b>4.12</b>	<b>\$105,355</b>	<b>\$657,033</b>	<b>10.63</b>	<b>594%</b>	<b>5.17</b>	<b>\$281,644</b>
<b>FRINGE BENEFIT RATE</b>	<b>28.00%</b>					<b>30.01%</b>				
<b>EMPLOYEE FRINGE BENEFITS</b>	<b>\$147,799</b>				<b>\$29,501</b>	<b>\$197,145</b>				<b>\$84,508</b>
<b>TOTAL SALARIES &amp; BENEFITS</b>	<b>\$675,623</b>				<b>\$134,856</b>	<b>\$854,178</b>				<b>\$366,152</b>

**HSA #2**

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

Appendix B-2, Page 2  
Date: December 2022

POSITION TITLE	Agency Totals		HSA Program		7/1/22 - 6/30/23			Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Program	DAS Program	DAS Program	DAS Program
					Budgeted Salary	Modification	Revised Salary	Budgeted Salary
Senior Center Director	\$109,863	1.00	51.18%	0.51	\$56,233		\$56,233	\$156,459
Manager-Chinese	\$71,936	1.00	20.00%	0.20	\$11,649	\$2,738	\$14,387	\$35,434
Program Assistant-Lao	\$50,213	0.67	35.00%	0.23	\$10,001	\$1,774	\$11,775	\$27,276
Program Assistant-Russian	\$50,213	0.67	35.00%	0.23	\$10,001	\$1,774	\$11,775	\$27,276
Program Assistant-Vietnamese	\$52,650	1.00	23.00%	0.23	\$10,001	\$2,109	\$12,110	\$27,610
Program Assistant-Vietnamese	\$50,213	1.00	44.50%	0.45	\$27,851	(\$5,506)	\$22,345	\$63,716
Program Advocate	\$48,750	1.00	10.00%	0.10	\$23,595	(\$18,720)	\$4,875	\$39,850
Program Assistant-Tagalog	\$53,625	1.00	70.00%	0.70	\$37,018	\$520	\$37,538	\$97,049
Program Assistant-LGBT	\$51,188	1.00	45.00%	0.45	\$15,476	\$7,559	\$23,035	\$50,056
Wellness Program Manager	\$95,979	1.00	5.21%	0.05	\$5,000		\$5,000	\$12,500
Program Assistant-LGBT	\$48,750	1.00	42.00%	0.42	\$13,712	\$6,763	\$20,475	\$34,187
LGBT Program Manager	\$66,553	1.00	100.00%	1.00		\$66,553	\$66,553	\$101,687
Program Assistant-Chinese	\$50,213	1.00	10.00%	0.10		\$5,021	\$5,021	\$5,021
				-				
				-				
				-				
<b>TOTALS</b>	<b>\$800,146</b>	<b>12.34</b>	<b>491%</b>	<b>4.68</b>	<b>\$220,537</b>	<b>\$70,585</b>	<b>\$291,122</b>	<b>\$678,121</b>
<b>FRINGE BENEFIT RATE</b>	<b>30.00%</b>				<b>30.00%</b>			
<b>EMPLOYEE FRINGE BENEFITS</b>	<b>\$224,053</b>				<b>\$66,168</b>	<b>\$21,169</b>	<b>\$87,337</b>	<b>\$201,346</b>
<b>TOTAL SALARIES &amp; BENEFITS</b>	<b>\$1,024,199</b>				<b>\$286,705</b>	<b>\$91,754</b>	<b>\$378,459</b>	<b>\$879,467</b>
<b>HSA #2</b>								<b>10/25/2016</b>

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

Appendix B-2, Page 3  
Date: December 2022

**Operating Expense Detail**

TERM	1/1/21 - 6/30/21		7/1/22 - 6/30/23			Total
	Revised	Revised	Budget	Modification	Revised	
<b>EXPENDITURE CATEGORY</b>						
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)	\$4,500	\$8,000	\$9,300	\$3,700	\$13,000	\$25,500
Office Supplies, Postage	\$3,000	\$6,000	\$6,793	\$7	\$6,800	\$15,800
Building Maintenance Supplies and Repair	\$2,300	\$6,000	\$6,500		\$6,500	\$14,800
Printing and Reproduction						
Insurance	\$3,200	\$5,000	\$6,500		\$6,500	\$14,700
Staff Training		\$600		\$600	\$600	\$1,200
Staff Travel-(Local & Out of Town)		\$200		\$800	\$800	\$1,000
Rental of Equipment						
<b>CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE</b>						
Movement and Meditation	\$1,170	\$3,015	\$2,340		\$2,340	\$6,525
<b>OTHER</b>						
Program supplies	\$2,000	\$6,647	\$3,110		\$3,110	\$11,757
Payroll fees	\$300	\$600	\$600		\$600	\$1,500
Recruitment	\$300	\$6,500	\$400	\$1,600	\$2,000	\$8,800
Computer Support	\$840	\$2,170	\$1,680	\$3,035	\$4,715	\$7,725
Transportation		\$11,739	\$11,739		\$11,739	\$23,478
<b>TOTAL OPERATING EXPENSE</b>	<b>\$17,610</b>	<b>\$56,471</b>	<b>\$48,962</b>	<b>\$9,742</b>	<b>\$58,704</b>	<b>\$132,785</b>
<b>HSA #3</b>						<b>10/25/2016</b>



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

Appendix B-2, Page 4  
Date: December 2022

**Program Expenditure Detail**

		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23			Total
		Revised	Revised	Budget	Modification	Revised	
<b>EQUIPMENT</b>							
No.	ITEM/DESCRIPTION						
TOTAL EQUIPMENT COST							
<b>OTHER SERVICES</b>							
Description							
	St. Anthony's outreach & safety (no indirect)	\$16,000	\$32,000	\$32,000		\$32,000	\$80,000
TOTAL REMODELING COST		\$16,000	\$32,000	\$32,000		\$32,000	\$80,000
<b>REMODELING</b>							
Description							
TOTAL REMODELING COST							
TOTAL CAPITAL EXPENDITURE (Equipment and Remodeling Cost)		\$16,000	\$32,000	\$32,000		\$32,000	\$80,000

**HSA #4**

**10/25/2016**

## Appendix A-2 - Services to be Provided

### Golden Gate Senior Services: Richmond Senior Center

#### Community Services

**January 1, 2021 to June 30, 2023**

#### **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	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. Source: California Code of Regulations Title 22, Sec. 7119
Grantee	Golden Gate Senior Services
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.
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

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs 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:

<b>Table A- Community Services</b>	01/01/2021-6/30/2021	FY21/22	FY22/23
Unduplicated Consumers (UDC)	82	244	325
Activity Scheduling	588	1763	2350
Translation Services	100	300	400
Social Services	113	338	450

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:

Melissa McGee  
Program Manager  
DAS OCP  
Melissa.mcgee@sfgov.org

and

Annyse Acevedo  
Contract Manager  
HSA OCM  
Annyse.acevedo@sfgov.org

## **X. Monitoring Activities**

1. 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.

2. 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		Term				
<b>Golden Gate Senior Services</b>		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. 07/01/2021			No. of Mod. 6			
<b>Program: Community Services, Richmond</b>						
Budget Reference Page No.(s)						
	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23			
Program Term	Revised	Revised	Budget	Modification	Revised	Total
<b>Expenditures</b>						
Salaries & Benefits	\$153,700	\$340,208	\$268,632	\$114,186	\$382,818	\$876,726
Operating Expenses	\$27,656	\$58,142	\$22,762	\$27,905	\$50,667	\$136,465
<b>Subtotal</b>	<b>\$181,356</b>	<b>\$398,350</b>	<b>\$291,394</b>	<b>\$142,091</b>	<b>\$433,485</b>	<b>\$1,013,191</b>
Indirect Percentage (%)	15.00%	15.00%	15.00%		15.00%	15.00%
Indirect Cost	\$27,204	\$59,752	\$43,708	\$21,313	\$65,021	\$151,977
Capital Expenditure						
<b>Total Expenditures</b>	<b>\$208,560</b>	<b>\$458,102</b>	<b>\$335,102</b>	<b>\$163,404</b>	<b>\$498,506</b>	<b>\$1,165,168</b>
<b>HSA Revenues</b>						
General Fund	\$198,385	\$314,565	\$314,565		\$314,565	\$827,515
CODB	\$9,437	\$19,157	\$19,157	\$13,404	\$32,561	\$61,155
MCO	\$738	\$1,380	\$1,380		\$1,380	\$3,498
Neighborhood networking program		\$66,000				\$66,000
Expand Russian speaking community outreach and enga		\$10,000				\$10,000
Programming and custodian support		\$47,000				\$47,000
Senior programing expansion				\$150,000	\$150,000	\$150,000
<b>Total HSA Revenue</b>	<b>\$208,560</b>	<b>\$458,102</b>	<b>\$335,102</b>	<b>\$163,404</b>	<b>\$498,506</b>	<b>\$1,165,168</b>
<b>Other Revenues</b>						
<b>Total DAS and Non DAS Revenue</b>	<b>\$208,560</b>	<b>\$458,102</b>	<b>\$335,102</b>	<b>\$163,404</b>	<b>\$498,506</b>	<b>\$1,165,168</b>
Full Time Equivalent (FTE)						
Prepared by:	Telephone No.:				Date:	
HSA-CO Review Signature:	_____					
<b>HSA #1</b>						<b>10/25/2016</b>

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

**Salaries & Benefits Detail**

Position	1/1/21 - 6/30/21					7/1/21 - 6/30/22				
	Agency Totals		HSA Program		DAS Program	Agency Totals		HSA Program		DAS Program
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Revised Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Revised Salary
Executive Director	\$89,600	0.25	100%	0.25	\$11,200					
RSC Director	\$134,716	0.85	80%	0.68	\$46,047	\$114,400	0.83	100%	0.83	\$94,380
Bilingual Center Coordinator	\$47,840	0.79	100%	0.79	\$18,865	\$52,000	0.65	100%	0.65	\$33,800
Activity Liasion	\$52,000	0.50	100%	0.50	\$12,900	\$60,226	0.55	100%	0.55	\$33,124
Community Programs Director	\$68,640	0.80	100%	0.80	\$27,456	\$72,800	1.00	100%	1.00	\$72,800
Custodian	\$41,600	0.20	100%	0.20	\$4,112	\$62,400	0.07	100%	0.07	\$4,488
Volunteer Manager	\$68,640	0.39	62.5%	0.24	\$8,355	\$68,640	0.50	75.0%	0.38	\$25,740
Facilities Coordinator (6 months)						\$61,360	0.63	100%	0.63	\$19,175
Facilities Maintenance Technician										
Operations Manager										
<b>Totals</b>	<b>\$503,036</b>	<b>3.78</b>	<b>642.50%</b>	<b>3.46</b>	<b>\$128,935</b>	<b>\$491,826</b>	<b>4.22</b>	<b>675.00%</b>	<b>4.10</b>	<b>\$283,507</b>
Fringe Benefits Rate	19.21%					20.00%				
Employee Fringe Benefits	\$96,620				\$24,765	\$98,365				\$56,701
<b>Total Salaries and Benefits</b>	<b>\$599,656</b>				<b>\$153,700</b>	<b>\$590,191</b>				<b>\$340,208</b>

HSA #2

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

Appendix B-2, Page 2  
Document Date: December, 2022

Position	Agency Totals		HSA Program		7/1/22 - 6/30/23			Total
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Program	DAS Program	DAS Program	DAS Program
					Budgeted Salary	Modification	Revised	Budgeted Salary
Executive Director								\$11,200
RSC Director	\$117,832	0.55	100%	0.55	\$57,200	\$7,608	\$64,808	\$205,235
Bilingual Center Coordinator	\$54,080	1.00	100%	1.00	\$33,800	\$20,280	\$54,080	\$106,745
Activity Liasion	\$64,480	0.55	100%	0.55	\$34,320	\$1,144	\$35,464	\$81,488
Community Programs Director	\$79,000	1.00	95%	0.95	\$72,800	\$2,250	\$75,050	\$175,306
Custodian								\$8,600
Volunteer Manager	\$68,640	0.50	75.0%	0.38	\$25,740		\$25,740	\$59,835
Facilities Coordinator (6 months)								\$19,175
Facilities Maintenance Technicia	\$60,320	0.38	100.00%	0.38		\$22,620	\$22,620	\$22,620
Operations Manager	\$70,720	0.58	100.00%	0.58		\$41,253	\$41,253	\$41,253
<b>Totals</b>	<b>\$515,072</b>	<b>4.56</b>	<b>670.00%</b>	<b>4.38</b>	<b>\$223,860</b>	<b>\$95,155</b>	<b>\$319,015</b>	<b>\$731,457</b>
Fringe Benefits Rate	20.00%				20%			
Employee Fringe Benefits	\$103,014				\$44,772	\$19,031	\$63,803	\$145,269
<b>Total Salaries and Benefits</b>	<b>\$618,086</b>				<b>\$268,632</b>	<b>\$114,186</b>	<b>\$382,818</b>	<b>\$876,726</b>
<b>HSA #2</b>								<b>10/25/2016</b>

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

Appendix B-2, Page 3  
 Document Date: December, 2022

**Operating Expense Detail**

Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23			Total
	Revised	Revised	Budget	Modification	Revised	
<b>Expenditure Category</b>						
Rental of Property	\$6,805	\$10,920	\$10,920	\$4,740	\$15,660	\$33,385
Utilities (Elec, Water, Gas, Phone, Garbage)	\$600	\$900	\$900	\$100	\$1,000	\$2,500
Office Supplies, Postage	\$2,110	\$5,085	\$1,000	\$596	\$1,596	\$8,791
Building Maintenance Supplies and Repair	\$1,300	\$7,702	\$1,500		\$1,500	\$10,502
Printing and Reproduction	\$1,100	\$500	\$300	\$200	\$500	\$2,100
Insurance						
Staff Training	\$661	\$1,000	\$700	\$1,000	\$1,700	\$3,361
Staff Travel-(Local & Out of Town)	\$480	\$500	\$200		\$200	\$1,180
Rental of Equipment						
<b>Consultant</b>						
<b>Other</b>						
Programs & Events	\$12,900	\$14,650	\$5,242	\$11,985	\$17,227	\$44,777
IT & Web Support	\$1,700	\$6,485	\$2,000	\$1,784	\$3,784	\$11,969
Community Outreach		\$10,400		\$7,500	\$7,500	\$17,900
<b>Total Operating Expenses</b>	<b>\$27,656</b>	<b>\$58,142</b>	<b>\$22,762</b>	<b>\$27,905</b>	<b>\$50,667</b>	<b>\$136,465</b>

**HSA #3** **10/25/2016**

## Appendix A-2 - Services to be Provided

### Openhouse

#### Community Services

**January 1, 2021 thru June 30, 2023**

**Modified December 7, 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	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. Source: California Code of Regulations Title 22, Sec. 7119
Grantee	Openhouse
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.
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**

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs 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:

In addition to general outreach to raise community awareness of Openhouse's offerings, Openhouse will be engaging in Enhanced Outreach by specifically targeting additional outreach to the Transgender community and LGBTQ+ older adults of color. In order to reach and engage these "communities within communities," Openhouse will develop specific programming in-house as well as fostering cross-organizational programming with other local organizations. Openhouse will also continue collaborations with organizations such as API Wellness/Trans Thrive, Lyric, PRC (formerly Positive Resource Center), and the City's Office of Transgender Initiatives.

- 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 15<sup>th</sup> 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:

<b>Table A- Community Services</b>	01/01/2021- 6/30/2021	FY21/22	FY22/23
Unduplicated Consumers (UDC)	100	300	430
Activity Scheduling	325	975	1,300
Translation Services	0	0	0
Social Services	275	825	1,550
Enhanced Outreach	23	68	110
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 10<sup>th</sup> 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 31<sup>st</sup> 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 10<sup>th</sup> (June-December data) and July 10<sup>th</sup> (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

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	Term					
<b>Openhouse</b>	Jan 2021 - Jun 2023					
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> <b>Modification <input checked="" type="checkbox"/></b>						
If modification, Effective Date of Mod. 12/1/2022			No. of Mod. # 2			
<b>Program: Community Services</b>						
Budget Reference Page No.(s)	Actual	Actual	Current	Modification	Revised	
Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 22/23	FY 22/23	Total
<b>Expenditures</b>						
Salaries & Benefits	\$168,997	\$402,748	\$315,791	\$210,144	\$525,935	\$1,097,680
Operating Expenses		\$25,649	\$25,650		\$25,650	\$51,299
<b>Subtotal</b>	\$168,997	\$428,397	\$341,441	\$210,144	\$551,585	\$1,148,979
Indirect Percentage (%)	15%	15%	15%	15%	15%	15.00%
Indirect Cost	\$25,350	\$64,260	\$51,216	\$31,522	\$82,738	\$172,348
Subcontractor/Capital Expenditure	\$24,500	\$49,000	\$49,000		\$49,000	\$122,500
<b>Total Expenditures</b>	\$218,847	\$541,657	\$441,657	\$241,666	\$683,323	\$1,443,827
<b>HSA Revenues</b>						
General Fund	\$218,847	\$541,657	\$441,657		\$441,657	\$1,202,161
FY22/23 OTO				\$225,000	\$225,000	\$225,000
FY22/23 CODB				\$16,666	\$16,666	\$16,666
<b>Total HSA Revenue</b>	\$218,847	\$541,657	\$441,657	\$241,666	\$683,323	\$1,443,827
<b>Other Revenues</b>						
<b>TOTAL DAS AND NON DAS REVENUE</b>	\$218,847	\$541,657	\$441,657	\$241,666	\$683,323	\$1,443,827
Full Time Equivalent (FTE)						
<b>HSA #1</b>						<b>12/7/2022</b>

Program: Community Services (Same as Line 11 on HSA #1)										
<b>Salaries &amp; Benefits Detail</b>										
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 1/1/21-6/30/21	Actual FY21/22	Current FY22/23	Modification FY22/23	Revised FY22/23	Total
Director of Programs	\$110,281	1.00			\$13,210					\$13,210
Director of CSS	\$95,000	1.00	10.00%	0.10	\$10,784	\$9,500	\$7,198	\$4,790	\$11,988	\$32,272
Mgr of CEP	\$72,720	1.00	25.00%	0.25	\$21,730	\$18,180	\$11,506	\$7,656	\$19,162	\$59,072
Staff Training & Dev	\$84,760	0.60			\$5,178					\$5,178
Education Coordinator	\$52,688	0.50	100.00%	0.50	\$15,162	\$26,344	\$17,771	\$11,826	\$29,597	\$71,103
Activities Coordinator	\$51,260	1.00	100.00%	1.00	\$25,000	\$51,260	\$35,543	\$23,652	\$59,195	\$135,455
Men's Group Facilitator	\$108,191	0.13	100.00%	0.13	\$3,746	\$13,524	\$8,644	\$5,752	\$14,396	\$31,666
Community Engagement Coord	\$50,965	1.00	32.50%	0.33	\$9,024	\$16,564	\$7,553	\$5,026	\$12,579	\$38,167
Data Coordinator	\$45,000	1.00	90.46%	0.90	\$7,000	\$40,706	\$32,360	\$21,534	\$53,894	\$101,600
Food Coordinator	\$49,369	1.00	100.00%	1.00	\$22,360	\$49,369	\$31,554	\$20,998	\$52,552	\$124,281
Program Assistant	\$52,000	0.75			\$4,837					\$4,837
Care Navigator	\$50,000	1.00			\$2,800					\$2,800
Volunteer Coordinator	\$52,000	1.00	100.00%	1.00		\$52,000	\$32,910	\$21,900	\$54,810	\$106,810
Director of CEP	\$97,000	1.00	20.10%	0.20		\$19,498	\$12,460	\$8,292	\$20,752	\$40,250
Activity Center Receptionist	\$41,600	1.00	62.50%	0.63		\$26,000	\$20,240	\$13,469	\$33,709	\$59,709
Operations Coordinator	\$49,920	1.00	25.40%	0.25		\$12,678	\$4,322	\$2,876	\$7,198	\$19,876
MH Support Supervisor	\$66,561	1.00					\$41,098	\$27,349	\$68,447	\$68,447
Totals	\$1,129,315	14.98	765.96%	6.28	\$140,831	\$335,623	\$263,159	\$175,120	\$438,279	\$914,733
Fringe Benefits Rate	20.00%									
Employee Fringe Benefits	\$225,863				\$28,166	\$67,125	\$52,632	\$35,024	\$87,656	\$182,947
<b>Total Salaries and Benefits</b>	\$1,355,178				\$168,997	\$402,748	\$315,791	\$210,144	\$525,935	\$1,097,680
HSA #2										12/7/2022

**Program: Community Services**

(Same as Line 11 on HSA #1)

**Operating Expense Detail**

	1/1/21 - 6/30/21	Actual FY 21/22	Current FY22/23	Modification FY22/23	Revised FY22/23	Total
<u>Expenditure Category</u>						
Rental of Property						
Utilities (Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance Supplies and Repair						
Printing and Reproduction		\$25,649	\$25,650		\$25,650	\$51,299
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
<u>Consultant</u>						
<u>Other</u>						
<b>Total Operating Expenses</b>		\$25,649	\$25,650		\$25,650	\$51,299
<b>HSA #3</b>						<b>12/7/2022</b>



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

**Subcontractor & Capital Expenditure Detail**

<u>Subcontractor Expenditure</u>	1/1/21 - 6/30/21	Actual FY21/22	Current FY22/23	Modification FY22/23	Revised FY22/23	Total
Subcontractor A						
Tenderloin Tessie Holiday Dinners	\$12,500	\$25,000	\$25,000		\$25,000	\$62,500
Mon Ami	\$12,000	\$24,000	\$24,000		\$24,000	\$60,000
<b>Total Subcontractor Expenditure</b>	<b>\$24,500</b>	<b>\$49,000</b>	<b>\$49,000</b>		<b>\$49,000</b>	<b>\$122,500</b>
<u>Equipment (Qty)</u>	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 22/23	FY 22/23	Total
Equipment A						
<b>Total Equipment Cost</b>						
<u>Remodeling</u>	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 22/23	FY 22/23	Total
Remodel A						
<b>Total Remodeling Cost</b>						
<b>Total Capital Expenditure</b>	<b>\$24,500</b>	<b>\$49,000</b>	<b>\$49,000</b>		<b>\$49,000</b>	<b>\$122,500</b>

**HSA #4**

**12/7/2022**

**Appendix A-3 - Services to be Provided**  
**YMCA SAN FRANCISCO – RICHMOND**  
**Community Services**  
**January 1, 2021 to June 30, 2023**

**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	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. Source: California Code of Regulations Title 22, Sec. 7119
Grantee	YMCA 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.
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.
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

This program is designed to serve all ethnicities and populations, with focused expertise to promote the unique cultural needs 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. Location is at 360 18<sup>th</sup> Avenue, San Francisco, CA 94121. Services are provided Monday – Friday (5:30am – 9:45pm) and Saturday – Sunday (7:30am – 7:00pm)

## 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 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 15<sup>th</sup> 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:

<b>Table A- Community Services</b>	01/01/2021- 6/30/2021	FY21/22	FY22/23
Unduplicated Consumers (UDC)	50	100	100
Activity Scheduling	240	572	572
Translation Services	0	0	0
Social Services	38	75	75
Enhanced Outreach	0	0	0
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 10<sup>th</sup> 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 31<sup>st</sup> 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 10<sup>th</sup> (June-December data) and July 10<sup>th</sup> (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 Contracts  
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 <b>YMCA (Richmond)</b>						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. 12/1/21 No. of Mod. 3						
<b>Program: Community Services</b>						
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	12/1/22 - 6/30/23	7/1/22 - 6/30/23	1/1/21-6/30/23
<b>Expenditures</b>						
Salaries & Benefits	\$69,485	\$89,775	\$71,839	\$10,061	\$81,900	\$241,160
Operating Expenses	\$12,328	\$27,530	\$1,988	\$36,370	\$38,358	\$78,216
<b>Subtotal</b>	<b>\$81,813</b>	<b>\$117,305</b>	<b>\$73,827</b>	<b>\$46,431</b>	<b>\$120,258</b>	<b>\$319,376</b>
Indirect Percentage (%)	13%	15%	15%		15%	14%
Indirect Cost	\$10,636	\$17,596	\$11,074	\$6,965	\$18,039	\$46,271
Subcontractor/Capital Expenditure						
<b>Total Expenditures</b>	<b>\$92,449</b>	<b>\$134,901</b>	<b>\$84,901</b>	<b>\$53,396</b>	<b>\$138,297</b>	<b>\$365,647</b>
<b>HSA Revenues</b>						
General Fund	\$39,487	\$78,974	\$78,974		\$78,974	\$197,435
Senior programming	\$50,000	\$50,000		\$50,000	\$50,000	\$150,000
CODB	\$2,369	\$4,216	\$4,809	\$3,396	\$8,205	\$14,790
MCO	\$593	\$1,711	\$1,118		\$1,118	\$3,422
<b>Total HSA Revenue</b>	<b>\$92,449</b>	<b>\$134,901</b>	<b>\$84,901</b>	<b>\$53,396</b>	<b>\$138,297</b>	<b>\$365,647</b>
<b>Other Revenues</b>						
<b>TOTAL DAS AND NON DAS REVENUE</b>	<b>\$92,449</b>	<b>\$134,901</b>	<b>\$84,901</b>	<b>\$53,396</b>	<b>\$138,297</b>	<b>\$365,647</b>
Full Time Equivalent (FTE)						
Prepared by:						
HSA-CO Review Signature: _____						
<b>HSA #1</b>						

Program: Community Services

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Salaries & Benefits Detail

Position	Agency Totals				DAS budgeted salary 1/1/21 - 6/30/21	Position	Agency Totals				DAS budgeted salary 7/1/21 - 6/30/22	(Modification)				(Total)			
	Agency Totals		HSA Program				Agency Totals		HSA Program			DAS budgeted salary	DAS budgeted salary	DAS budgeted salary	DAS budgeted salary				
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE			Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE		7/1/22 - 6/30/23	12/1/22 - 6/30/23	7/1/22 - 6/30/23	1/1/21-6/30/23				
Senior Director of Engagement	\$85,812	1.00	37%	0.37	\$16,090	Senior Director of Engagement	\$90,106	1.00	25%	0.25	\$22,840			\$9,011	(\$9,011)	\$34,070	\$38,930		
AOA Lead Staff	\$43,056	1.00	56%	0.56	\$12,140	Coordinator	\$54,080	1.00	58%	0.58	\$31,366	\$56,784	1.00	60%	0.60	\$37,856	(\$3,786)	\$34,070	\$77,576
Exercise Instructors						Exercise Instructors	\$72,530	1.00	17%	0.17	\$12,037	\$72,530	1.00	21%	0.21	\$6,084	\$9,025	\$15,109	\$27,146
District Director						District Director						\$96,795	1.00	10%	0.10	\$9,670	\$9,670	\$9,670	\$9,670
Chair Yoga Instructor	\$37,198	0.50	21%	0.10	\$1,950	Support Staff					\$41,600	1.00	10%	0.10	\$4,000	\$4,000	\$4,000	\$5,950	
AOA Strength Instructor #1	\$63,710	1.00	2%	0.02	\$687													\$687	
AOA Strength Instructor #2	\$85,156	0.50	4%	0.02	\$819													\$819	
Executive Director	\$128,000	1.00	24%	0.24	\$15,353													\$15,353	
Senior Director of Healthy Living	\$85,000	1.00	17%	0.17	\$7,083													\$7,083	
BAVC Group Exercise Instructor #1	\$65,641	0.50	1%	0.01	\$245													\$245	
BAVC Group Exercise Instructor #2	\$58,162	0.50	2%	0.01	\$260													\$260	
BAVC Group Exercise Instructor #3	\$70,560	0.50	5%	0.03	\$963													\$963	
BAVC Group Exercise Instructor #4	\$63,710	0.50	6%	0.03	\$896													\$896	
<b>Totals</b>	<b>\$786,006</b>	<b>8.00</b>	<b>176%</b>	<b>1.56</b>	<b>\$56,486</b>	<b>Totals</b>	<b>\$216,716</b>	<b>3.00</b>	<b>100%</b>	<b>1.00</b>	<b>\$66,243</b>	<b>\$267,709</b>	<b>4.00</b>	<b>100%</b>	<b>1.00</b>	<b>\$52,951</b>	<b>\$9,898</b>	<b>\$62,849</b>	<b>\$185,578</b>
Fringe Benefits Rate	23%					Fringe Benefits Rate	36%					30%				36%			
Employee Fringe Benefits	\$180,882				\$12,999	Employee Fringe Benefits	\$76,986				\$23,532	\$81,148				\$18,888	\$163	\$19,051	\$55,582
<b>Total Salaries and Benefits</b>	<b>\$966,888</b>				<b>\$69,485</b>	<b>Total Salaries and Benefits</b>	<b>\$293,702</b>				<b>\$89,775</b>	<b>\$348,857</b>				<b>\$71,839</b>	<b>\$10,061</b>	<b>\$81,900</b>	<b>\$241,160</b>

Expenditure Category	Operating Expense Detail					(Total)
	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	(Modification) 12/1/22 - 6/30/23	7/1/22 - 6/30/23	
Rental of Property						
Utilities (Elec, Water, Gas, Phone, Garbage)		\$250	\$250		\$250	\$500
Office Supplies, Postage		\$184				\$184
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance		\$807	\$807		\$807	\$1,614
Staff Training						
Staff Travel-(Local & Out of Town)	\$260					\$260
Rental of Equipment						
<b>Consultant</b>						
Activities Class Instructors				\$6,000	\$6,000	\$6,000
<b>Other</b>						
Food Delivery Vehicle Maintenance	\$334					\$334
Program Supplies	\$7,834	\$5,158	\$931	\$2,010	\$2,941	\$15,933
Food & Beverage		\$7,000		\$4,650	\$4,650	\$11,650
BAVC Transportation						
CTN Program	\$3,900					\$3,900
Bus Transportation		\$4,000		\$6,690	\$6,690	\$10,690
PPE Equipment						
Safety Seminar						
Senior Safety Equipment						
Exercise Equipment		\$6,500		\$1,450	\$1,450	\$7,950
Speaker System		\$1,174				\$1,174
Program Chairs		\$1,477				\$1,477
Program Entrance Fees		\$980		\$15,570	\$15,570	\$16,550
<b>Total Operating Expenses</b>	<b>\$12,328</b>	<b>\$27,530</b>	<b>\$1,988</b>	<b>\$36,370</b>	<b>\$38,358</b>	<b>\$78,216</b>
<b>HSA #3</b>						