



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

P.O. Box 7988  
San Francisco, CA  
94120-7988  
[www.SFHSA.org](http://www.SFHSA.org)

**MEMORANDUM**

**TO:** DISABILITY AND AGING SERVICES COMMISSION  
**THROUGH:** KELLY DEARMAN, EXECUTIVE DIRECTOR  
**FROM:** CINDY KAUFFMAN, DEPUTY DIRECTOR  
 ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS  
**DATE:** July 19, 2023  
**SUBJECT:** NEW GRANTS: **MULTIPLE GRANTEES** (NON-PROFIT)  
 FOR PROVISION OF THE INTERGENERATIONAL  
 PROGRAM

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<b>GRANT TERM:</b>	07/01/23 – 06/30/27				
<b>GRANT AMOUNT:</b>	New	Contingency	Total		
	\$3,596,760	\$359,676	\$3,956,436		
<b>ANNUAL AMOUNT</b>	FY 23/24	FY 24/25	FY 25/26	FY 26/27	
	\$899,190	\$899,190	\$899,190	\$899,190	
<b>Funding Source</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>Funding:</b>	\$3,596,760			\$359,676	\$3,956,436
<b>Percentage:</b>	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grants with multiple providers for the period of July 1, 2023 through June 30, 2027, in an amount of \$3,596,760 plus a 10% contingency for a total amount not to exceed \$3,956,436. The specific breakdown of funding per grantee is summarized in the table on page 2. The purpose of the grants is to provide intergenerational programming for older adults and adults with disabilities living in the City and County of San Francisco.



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

**Background**

This program was initiated by the 2018 Dignity Fund Community Needs Assessment which revealed that consumers and providers have a need for services and programming that allow older adults and adults with disabilities to interact with other community members, specifically youth and younger adults. Older adults and adults with disabilities want to expand their community and interact with people of all ages. Intergenerational programs will promote these types of interactions and create opportunities for older and younger generations to recognize and share their skills, needs, and experiences with one another and help build and expand communities. These programs will ultimately facilitate social engagement and exchange between older adults or adults with disabilities and individuals belonging to other generations in San Francisco.

	<b>Annual amount</b>	<b>Grant amount 07/23 – 06/27</b>	<b>Contingency</b>	<b>Not-to-Exceed</b>
Bayview Hunters Point Multipurpose Senior Services	\$132,120	\$528,480	\$52,848	\$581,328
Front Porch Communities Foundation	\$25,000	\$100,000	\$10,000	\$110,000
Lighthouse for the Blind and Visually Impaired	\$29,390	\$117,560	\$11,756	\$129,316
Mission Neighborhood Center	\$176,202	\$704,808	\$70,481	\$775,289
Openhouse	\$270,381	\$1,081,524	\$108,152	\$1,189,676
Self-Help for the Elderly	\$95,639	\$382,556	\$38,256	\$420,812
Sequoia Living	\$170,458	\$681,832	\$68,183	\$750,015
<b>Total</b>	<b>\$899,190</b>	<b>\$3,596,760</b>	<b>\$359,676</b>	<b>\$3,956,436</b>

### **Services to be Provided**

The grantees will continue to provide intergenerational programming for older adults and adults with disabilities living in the City and County of San Francisco. The program will bring together a minimum of two different generations and at least one of the participating generations will be inclusive of older adults and/or adults with disabilities. The grantees will provide intergenerational programming that is structured, scheduled, and ongoing. The grantees will offer activities that promote joint engagement by each of the generations involved, and encourage relationship-building between the participating generations that is mutually beneficial.

Please refer to the attached Appendices A, B, and F for each grantee for more detailed information regarding service objectives, outcome objectives, budget, and location of services.

### **Selection**

Grantees were selected through RFP #1051, which was issued in February 2023.

### **Funding**

Funding for these grants is provided through county general fund.

### **Attachments**

Bayview Hunters Point Multipurpose Senior Services

Appendix A, Scope

Appendix B, Budget

Appendix F, Site Chart

Front Porch Communities Foundation / Ruth's Table

Appendix A, Scope

Appendix B, Budget

Appendix F, Site Chart

Lighthouse for the Blind and Visually Impaired

Appendix A, Scope

Appendix B, Budget

Appendix F, Site Chart

Mission Neighborhood Center

Appendix A, Scope

Appendix B, Budget

Appendix F, Site Chart

Openhouse

Appendix A, Scope

Appendix B, Budget

Appendix F, Site Chart

Self-Help for the Elderly

Appendix A, Scope

Appendix B, Budget

Appendix F, Site Chart

Sequoia Living

Appendix A, Scope

Appendix B, Budget

Appendix F, Site Chart

**APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE  
BAYVIEW HUNTERS PT MULTIPURPOSE SR SVC**

**INTERGENERATIONAL PROGRAM  
July 1, 2023 – June 30, 2027**

**I. Purpose**

The purpose of this grant is to provide intergenerational programming for older adults and adults with disabilities in San Francisco. The goal is to foster interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement by bringing together older adults and/or adults with disabilities with a generation other than their own.

**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.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
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
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of

	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Grantee	Bayview Hunter's Point Multipurpose Senior Services
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
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. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older.
SF DAS 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.
SF-HSA	Human Services Agency of the City and County of San Francisco
Socially Isolated	Having few social relationships and few people to interact with regularly.
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> )
Unduplicated Consumer (UDC)	An individual who participates in intergenerational programming and the grantee reflects consumer participation in SF DAS 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

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

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that are structured, ongoing, and jointly participated by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face-to-face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.
2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target

generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.

3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee's website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
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. One unit of service equals one hour of intergenerational programming provided.

<b>Table A- Service Objectives</b>	<b>FY 23-24</b>	<b>FY 24-25</b>	<b>FY 25-26</b>	<b>FY 26-27</b>
Unduplicated Consumers (UDC)	<b>150</b>	<b>150</b>	<b>150</b>	<b>150</b>
Intergenerational Programming Hours	<b>620</b>	<b>620</b>	<b>620</b>	<b>620</b>

## VIII. Outcome Objectives

1. Consumers develop new relationships or friendships. Target: 80%.

2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **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 a DAS OCP approved intake form into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS 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 enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

Steve Kim  
steve.kim@sfgov.org  
Contract Manager, HSA OCM  
Or  
Sarah Chan  
sarah.chan@sfgov.org  
Program Analyst, DAS OCP



## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on SF DAS 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS 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; a board of director list and whether services are provided appropriately according to Sections VI and VII.
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 <b>Bayview Senior Services</b>	Term 7/1/23 - 6/30/27				
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod.                      No. of Mod.					
<b>Program: Intergenerational Program</b>					
Budget Reference Page No.(s)					Total
Program Term	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
<b>Expenditures</b>					
Salaries & Benefits	\$105,564	\$105,564	\$105,564	\$105,564	\$422,256
Operating Expenses	\$14,545	\$14,545	\$14,545	\$14,545	\$58,180
<b>Subtotal</b>	<b>\$120,109</b>	<b>\$120,109</b>	<b>\$120,109</b>	<b>\$120,109</b>	<b>\$480,436</b>
Indirect Percentage (10%)	10%	10%	10%	10%	10%
Indirect Cost (Line 16 X Line 15)	\$12,011	\$12,011	\$12,011	\$12,011	\$48,044
Subcontractor/Capital Expenditures					
<b>Total Expenditures</b>	<b>\$132,120</b>	<b>\$132,120</b>	<b>\$132,120</b>	<b>\$132,120</b>	<b>\$528,480</b>
<b>HSA Revenues</b>					
General Funds	\$132,120	\$132,120	\$132,120	\$132,120	\$528,480
<b>TOTAL HSA REVENUES</b>	<b>\$132,120</b>	<b>\$132,120</b>	<b>\$132,120</b>	<b>\$132,120</b>	<b>\$528,480</b>
<b>Other Revenues</b>					
Dream Keepers	\$10,250				\$10,250
<b>Total Revenues</b>	<b>\$142,370</b>	<b>\$132,120</b>	<b>\$132,120</b>	<b>\$132,120</b>	<b>\$538,730</b>
Full Time Equivalent (FTE)					
Prepared by:	Telephone No.:				
HSA-CO Review Signature:	_____				
<b>HSA #1</b>					

**Bayview Senior Services**

**Program: Intergenerational Program**

**Salaries & Benefits Detail**

POSITION TITLE	Agency Totals		HSA Program		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS	DAS	DAS	DAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Intergenerational Program Coord	\$80,080	1.00	90%	0.90	\$72,072	\$72,072	\$72,072	\$72,072	\$288,288
Program Assistant	\$41,600	1.00	25%	0.25	\$10,400	\$10,400	\$10,400	\$10,400	\$41,600
<b>TOTALS</b>	<b>\$121,680</b>	<b>2.00</b>	<b>115%</b>	<b>1.15</b>	<b>\$82,472</b>	<b>\$82,472</b>	<b>\$82,472</b>	<b>\$82,472</b>	<b>\$329,888</b>
FRINGE BENEFIT RATE	28%								
EMPLOYEE FRINGE BENEFITS	\$34,070				\$23,092	\$23,092	\$23,092	\$23,092	\$92,368
TOTAL SALARIES & BENEFITS	\$155,750				\$105,564	\$105,564	\$105,564	\$105,564	\$422,256
<b>HSA #2</b>									

**Bayview Senior Services**

**Program: Intergenerational Program**

**Operating Expense Detail**

<u>Expenditure Category</u>	<u>TERM</u>	<u>7/1/23 - 6/30/24</u>	<u>7/1/24 - 6/30/25</u>	<u>7/1/25 - 6/30/26</u>	<u>7/1/26 - 6/30/27</u>	<u>TOTAL</u> <u>7/1/23 - 6/30/27</u>
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage		\$1,800	\$1,800	\$1,800	\$1,800	\$7,200
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance		\$1,000	\$1,000	\$1,000	\$1,000	\$4,000
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
<b>CONSULTANTS</b>						
Video / IT - Don Bowen		\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
<b>OTHER</b>						
Program Supplies/Activity		\$5,145	\$5,145	\$5,145	\$5,145	\$20,580
Transportation		\$3,600	\$3,600	\$3,600	\$3,600	\$14,400
<b>TOTAL OPERATING EXPENSES</b>		<b>\$14,545</b>	<b>\$14,545</b>	<b>\$14,545</b>	<b>\$14,545</b>	<b>\$58,180</b>

**HSA #3**

## SITE CHART - Intergenerational Program

FY: 23-27

AGENCY: Bayview Hunters Point Multipurpose Senior Services					
CONTRACT MAILING ADDRESS: 1753 Carroll St., San Francisco, CA 94124		Agency's web site: <a href="https://bhpmss.org/">https://bhpmss.org/</a>			
DIRECTOR: Cathy Davis, MSW, Executive Director			PHONE NO.: 415-822-1444		
<b>Program:</b> <b>Intergenerational Program</b>					
<b>SITES: Name of Site</b>	Dr. George Davis Senior Center				
Address and Zip	1753 Carroll St. San Francisco, CA 94124				
Phone Number	415-822-1444				
Fax Number	415-822-5327				
Neighborhood	Bayview Hunters Point				
Supervisorial District No.	10				
Site Manager/Coordinator	William Rhodes				
Additional Programs Offered at Site	Always Active, Arts & Crafts, Brown Bag, Computer Classes, Health Education, Food Giveaways, Exercise, Choir, Music Events, Trips, Special Events, ADRC site, Cong Meals				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun				
Hours Open	9:00a.m. - 5:00p.m., M-W-F 8:00a.m. - 8:00 p.m., T & Th 9:00a.m. - 4:00p.m. Sat				
DAS Funded Meal Service (Yes/No)	Yes				
Number of Service Days Closed	11				
	New Year's Day, Martin Luther Kind Jr., Veterans Day, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day+one				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				

**APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE  
FRONT PORCH COMMUNITIES FOUNDATION**

**INTERGENERATIONAL PROGRAM**

**July 1, 2023 – June 30, 2027**

**I. Purpose**

The purpose of this grant is to provide intergenerational programming for older adults and adults with disabilities in San Francisco. The goal is to foster interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement by bringing together older adults and/or adults with disabilities with a generation other than their own.

**II. Definitions**

Adult with a Disability	A person 18 years of age or older living with a disability
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City	City and County of San Francisco, a municipal corporation.
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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
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of

	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Grantee	Front Porch Communities Foundation
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
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. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
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Older Adult	Person who is 60 years of age or older.
SF DAS 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.
SF-HSA	Human Services Agency of the City and County of San Francisco
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Unduplicated Consumer (UDC)	An individual who participates in intergenerational programming and the grantee reflects consumer participation in SF DAS 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

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

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that are structured, ongoing, and jointly participated by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face-to-face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.
2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target



generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.

3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee's website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
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. One unit of service equals one hour of intergenerational programming provided.

<b>Table A- Service Objectives</b>	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	60	60	60	60
Intergenerational Programming Hours	120	120	120	120

## VIII. Outcome Objectives

1. Consumers develop new relationships or friendships. Target: 80%.

2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **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 a DAS OCP approved intake form into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS 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 enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

Patrick Garcia  
Patrick.Garcia@sfgov.org  
Contract Manager, HSA OCM  
Or  
Paulo Salta  
Paulo.Salta@sfgov.org  
Program Manager, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on SF DAS 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS 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; a board of director list and whether services are provided appropriately according to Sections VI and VII.
  
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**

<b>Name</b> <b>Front Porch</b>					<b>Term</b> 7/1/23 - 6/30/27
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
<b>Program: Intergenerational Programs</b>					
Budget Reference Page No.(s)					(Total)
Program Term	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
<b>DAS Expenditures</b>					
Salaries & Benefits	\$16,392	\$16,392	\$16,392	\$16,392	\$65,568
Operating Expenses	\$8,608	\$8,608	\$8,608	\$8,608	\$34,432
<b>Subtotal</b>	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
Indirect Percentage (%)					
Indirect Cost					
Capital/Subcontractor Expenditures					
<b>Total DAS Expenditures</b>	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
<b>DAS Revenues</b>					
General Funds	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
<b>Total DAS Revenue</b>	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
<b>Non DAS Revenues</b>					
<b>Total Non DAS Revenue</b>					
<b>TOTAL DAS AND NON DAS REVENUE</b>	\$25,000	\$25,000	\$25,000	\$25,000	\$100,000
Full Time Equivalent (FTE)	0.22	0.22	0.22	0.22	0.88
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

**Salaries & Benefits Detail**

(Total)

<b>DAS Salaries &amp; Benefits</b>	Agency Totals		HSA Program		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Position Title	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Associate Director	\$79,140	0.15	100%	0.15	\$11,871	\$11,871	\$11,871	\$11,871	\$47,484
Program & Communications Coordinator	\$64,584	0.07	100%	0.07	\$4,521	\$4,521	\$4,521	\$4,521	\$18,084
<b>Totals</b>	<b>\$143,724</b>	<b>0.22</b>	<b>200%</b>	<b>0.22</b>	<b>\$16,392</b>	<b>\$16,392</b>	<b>\$16,392</b>	<b>\$16,392</b>	<b>\$65,568</b>
Fringe Benefits Rate									
Employee Fringe Benefits									
<b>Total DAS Salaries and Benefits</b>	<b>\$143,724</b>				<b>\$16,392</b>	<b>\$16,392</b>	<b>\$16,392</b>	<b>\$16,392</b>	<b>\$65,568</b>
<b>HSA #2</b>									

**Operating Expense Detail**

	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	(Total) 7/1/23 - 6/30/27
<b>DAS Operating Expenses</b>					
<u>Expenditure Category</u>					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Scavenger)					
Office Supplies, Postage	\$5,074	\$6,108	\$5,908	\$5,608	\$22,698
Building Maintenance Supplies and Repair					
Printing and Reproduction	\$1,200	\$1,300	\$1,400	\$1,500	\$5,400
Insurance					
Staff Training	\$1,000	\$1,200	\$1,300	\$1,500	\$5,000
Staff Travel					
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
Recruitment & Marketing	\$1,334				\$1,334
<b>Total DAS Operating Expenses</b>	<b>\$8,608</b>	<b>\$8,608</b>	<b>\$8,608</b>	<b>\$8,608</b>	<b>\$34,432</b>

HSA #3

SITE CHART				FY: 2023-2027	
AGENCY: Front Porch Communities Foundation					
CONTRACT MAILING ADDRESS: 800 North Brand Blvd., 19th Floor, Glendale, CA 91203		Agency's web site:		<a href="https://frontporch.net/">https://frontporch.net/</a>	
Executive Director: Margarita Mukhsinova				PHONE NO.: 415.728.1095	
<b>Program: Intergenerational Program</b>					
<b>SITES: Name of Site</b>		Ruth's Table			
Address and Zip		3160 21st Street San Francisco, CA 94110			
Phone Number		415-642-1000			
Fax Number					
Neighborhood		Mission			
Supervisorial District No.		9			
Person in Charge:		Margarita Mukhsinova			
Additional Programs Offered at Site		Creative art programs and gallery exhibitions			
Days Open		<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun			
Hours Open		10:00AM-5:00PM			
Days Closed (list holidays closed)		Holidays closed: New Year's Day, MLK, President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day			
ADA Accessible		<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

**APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE  
LIGHTHOUSE FOR THE BLIND AND VISUALLY IMPAIRED**

**INTERGENERATIONAL PROGRAM**

**July 1, 2023 – June 30, 2027**

**I. Purpose**

The purpose of this grant is to provide intergenerational programming for older adults and adults with disabilities in San Francisco. The goal is to foster interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement by bringing together older adults and/or adults with disabilities with a generation other than their own.

**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.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
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
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of



	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Grantee	LightHouse for the Blind and Visually Impaired
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
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. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older.
SF DAS 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.
SF-HSA	Human Services Agency of the City and County of San Francisco
Socially Isolated	Having few social relationships and few people to interact with regularly.
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> )
Unduplicated Consumer (UDC)	An individual who participates in intergenerational programming and the grantee reflects consumer participation in SF DAS 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

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

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that are structured, ongoing, and jointly participated by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face-to-face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.
2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target

generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.

3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee's website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
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. One unit of service equals one hour of intergenerational programming provided.

<b>Table A- Service Objectives</b>	<b>FY 23-24</b>	<b>FY 24-25</b>	<b>FY 25-26</b>	<b>FY 26-27</b>
Unduplicated Consumers (UDC)	<b>45</b>	<b>45</b>	<b>45</b>	<b>45</b>
Intergenerational Programming Hours	<b>500</b>	<b>500</b>	<b>500</b>	<b>500</b>

## VIII. Outcome Objectives

1. Consumers develop new relationships or friendships. Target: 80%.

2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **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 a DAS OCP approved intake form into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS 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 enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

Ella Lee  
ella.lee@sfgov.org  
Contract Manager, HSA OCM  
Or  
Paulo Salta  
Paulo.Salta@sfgov.org  
Program Analyst, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on SF DAS 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS 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; a board of director list and whether services are provided appropriately according to Sections VI and VII.
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 Lighthouse for the Blind and Visually Blind					Term 7/1/23 - 6/30/27
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
<b>Program: Intergenerational program</b>					
Budget Reference Page No.(s)					7/1/23 - 6/30/27
Program Term	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	Total
<b>Expenditures</b>					
Salaries & Benefits	\$23,557	\$23,557	\$23,557	\$23,557	\$94,228
Operating Expenses	\$3,161	\$3,161	\$3,161	\$3,161	\$12,644
<b>Subtotal</b>	<b>\$26,718</b>	<b>\$26,718</b>	<b>\$26,718</b>	<b>\$26,718</b>	<b>\$106,872</b>
Indirect Percentage (%)	10%	10%	10%	10%	10%
Indirect Cost (Line 16 X Line 15)	\$2,672	\$2,672	\$2,672	\$2,672	\$10,688
Subcontractor/Capital Expenditures					
Total Expenditures	\$29,390	\$29,390	\$29,390	\$29,390	\$117,560
<b>HSA Revenues</b>					
General Funds	\$29,390	\$29,390	\$29,390	\$29,390	\$117,560
<b>TOTAL HSA REVENUES</b>	<b>\$29,390</b>	<b>\$29,390</b>	<b>\$29,390</b>	<b>\$29,390</b>	<b>\$117,560</b>
<b>Other Revenues</b>					
Total Revenues					
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
<b>HSA #1</b>					<b>6/20/2018</b>

Lighthouse for the Blind and Visually Blind  
 Program: Intergenerational program

**Salaries & Benefits Detail**

POSITION TITLE	Agency Totals		HSA Program		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAAS	DAAS	DAAS	DAAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Sr. Director of community services	\$156,000	0.02	100%	0.02	\$3,120	\$3,120	\$3,120	\$3,120	\$12,480
Youth services coordinator	\$80,122	0.09	100%	0.09	\$7,211	\$7,211	\$7,211	\$7,211	\$28,844
Adult programs coordinator (2)	\$75,298	0.05	100%	0.05	\$3,915	\$3,915	\$3,915	\$3,915	\$15,660
Youth program assistant	\$77,376	0.05	100%	0.05	\$3,600	\$3,600	\$3,600	\$3,600	\$14,400
				-					
				-					
				-					
				-					
<b>TOTALS</b>	<b>\$388,796</b>	<b>0.19</b>	<b>300%</b>	<b>0.19</b>	<b>\$17,846</b>	<b>\$17,846</b>	<b>\$17,846</b>	<b>\$17,846</b>	<b>\$71,384</b>
FRINGE BENEFIT RATE	32%								
EMPLOYEE FRINGE BENEFITS	\$124,415				\$5,711	\$5,711	\$5,711	\$5,711	\$22,844
<b>TOTAL SALARIES &amp; BENEFITS</b>	<b>\$513,211</b>				<b>\$23,557</b>	<b>\$23,557</b>	<b>\$23,557</b>	<b>\$23,557</b>	<b>\$94,228</b>
<b>HSA #2</b>									<b>6/20/2018</b>

Lighthouse for the Blind and Visually Blind  
 Program: Intergenerational program

**Operating Expense Detail**

<u>Expenditure Category</u>	TERM					TOTAL
		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)						
Office Supplies, Postage						
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)		\$315	\$315	\$315	\$315	\$1,260
Rental of Equipment						
<b>CONSULTANTS</b>						
<b>OTHER</b>						
Program supplies		\$2,346	\$2,346	\$2,346	\$2,346	\$9,384
Student transportation		\$500	\$500	\$500	\$500	\$2,000
<b>TOTAL OPERATING EXPENSES</b>		\$3,161	\$3,161	\$3,161	\$3,161	\$12,644
<b>HSA #3</b>						<b>6/20/2018</b>



<b>SITE CHART - Intergenerational Program</b>					FY: 23-27
AGENCY: Lighthouse for the Blind and Visually Impaired					
CONTRACT MAILING ADDRESS: 1155 Market Street, 10th Fl., 94103			Agency's web site: lighthouse-sf.org		
CEO: Sharon Giovinazzo		PHONE NO.: 415-431-1481			
<b>Program:</b> <b>Intergenerational Program</b>					
<b>SITES: Name of Site</b>	Lighthouse for the Blind and Visually Impaired				
Address and Zip	1155 Market Street, 10th Floor, 94103				
Phone Number	415-431-1481				
Fax Number	415-863-7568				
Neighborhood	Mid Market				
Supervisorial District No.	6				
Site Director	Anthony Fletcher				
Additional Programs Offered at Site	Community Services, Tech Training, Daily Living, Counseling, Braille, White Cane Mobility, Youth Enrichment				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed				
	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri				
	<input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun				
Hours Open	8:00 a.m. - 6:00 p.m.				
Days Closed (list holidays closed)	New Year's Day, Martin Luther King Jr., President's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Dec 25th - 31st, Fifth Saturdays				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				

**APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE  
MISSION NEIGHBORHOOD CENTERS**

**INTERGENERATIONAL PROGRAM  
July 1, 2023 – June 30, 2027**

**I. Purpose**

The purpose of this grant is to provide intergenerational programming for older adults and adults with disabilities in San Francisco. The goal is to foster interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement by bringing together older adults and/or adults with disabilities with a generation other than their own.

**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.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
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
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of

	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Grantee	Mission Neighborhood Centers
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
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. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older.
SF DAS 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.
SF-HSA	Human Services Agency of the City and County of San Francisco
Socially Isolated	Having few social relationships and few people to interact with regularly.
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> )
Unduplicated Consumer (UDC)	An individual who participates in intergenerational programming and the grantee reflects consumer participation in SF DAS 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

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

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that are structured, ongoing, and jointly participated by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face-to-face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.
2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target

generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.

3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee's website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
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. One unit of service equals one hour of intergenerational programming provided.

<b>Table A- Service Objectives</b>	<b>FY 23-24</b>	<b>FY 24-25</b>	<b>FY 25-26</b>	<b>FY 26-27</b>
Unduplicated Consumers (UDC)	<b>160</b>	<b>160</b>	<b>160</b>	<b>160</b>
Intergenerational Programming Hours	<b>620</b>	<b>620</b>	<b>620</b>	<b>620</b>

## VIII. Outcome Objectives

1. Consumers develop new relationships or friendships. Target: 80%.

2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **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 a DAS OCP approved intake form into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS 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 enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

Ella Lee  
ella.lee@sfgov.org  
Contract Manager, HSA OCM  
Or  
Sarah Chan  
sarah.chan@sfgov.org  
Program Analyst, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on SF DAS 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS 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; a board of director list and whether services are provided appropriately according to Sections VI and VII.
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 Mission Neighborhood Centers, Inc.					Term 7/1/23 - 6/30/27
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
<b>Program: Intergenerational program</b>					
Budget Reference Page No.(s)					7/1/23 - 6/30/27
Program Term	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	Total
<b>Expenditures</b>					
Salaries & Benefits	\$58,104	\$58,104	\$58,104	\$58,104	\$232,416
Operating Expenses	\$51,637	\$51,637	\$51,637	\$51,637	\$206,548
<b>Subtotal</b>	\$109,741	\$109,741	\$109,741	\$109,741	\$438,964
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$16,461	\$16,461	\$16,461	\$16,461	\$65,844
Subcontractor/Capital Expenditures	\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
Total Expenditures	\$176,202	\$176,202	\$176,202	\$176,202	\$704,808
<b>HSA Revenues</b>					
General Funds	\$176,202	\$176,202	\$176,202	\$176,202	\$704,808
<b>TOTAL HSA REVENUES</b>	\$176,202	\$176,202	\$176,202	\$176,202	\$704,808
<b>Other Revenues</b>					
Total Revenues					
Full Time Equivalent (FTE)					
Prepared by:					Telephone No.:
HSA-CO Review Signature:	_____				
<b>HSA #1</b>					<b>6/20/2018</b>



Mission Neighborhood Centers, Inc.  
 Program: Intergenerational program

**Salaries & Benefits Detail**

POSITION TITLE	Agency Totals		HSA Program		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAAS	DAAS	DAAS	DAAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Activities coordinator	\$62,400	0.25	100%	0.25	\$15,600	\$15,600	\$15,600	\$15,600	\$62,400
Activities and outreach specialist	\$56,160	0.20	100%	0.20	\$11,232	\$11,232	\$11,232	\$11,232	\$44,928
Community resources specialist	\$56,160	0.14	100%	0.14	\$7,862	\$7,862	\$7,862	\$7,862	\$31,448
Center manager	\$78,000	0.10	100%	0.10	\$7,800	\$7,800	\$7,800	\$7,800	\$31,200
Director	\$93,000	0.02	100%	0.02	\$1,860	\$1,860	\$1,860	\$1,860	\$7,440
				-					
				-					
				-					
<b>TOTALS</b>	<b>\$345,720</b>	<b>0.46</b>	<b>400%</b>	<b>0.46</b>	<b>\$44,354</b>	<b>\$44,354</b>	<b>\$44,354</b>	<b>\$44,354</b>	<b>\$177,416</b>
FRINGE BENEFIT RATE	31%								
EMPLOYEE FRINGE BENEFITS	\$107,173				\$13,750	\$13,750	\$13,750	\$13,750	\$55,000
<b>TOTAL SALARIES &amp; BENEFITS</b>	<b>\$452,893</b>				<b>\$58,104</b>	<b>\$58,104</b>	<b>\$58,104</b>	<b>\$58,104</b>	<b>\$232,416</b>
<b>HSA #2</b>									<b>6/20/2018</b>

Mission Neighborhood Centers, Inc.  
 Program: Intergenerational program

Appendix B, Page 3

**Operating Expense Detail**

<u>Expenditure Category</u>	TERM					TOTAL
		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Rental of Property		\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,620	\$1,620	\$1,620	\$1,620	\$6,480
Office Supplies, Postage		\$1,800	\$1,800	\$1,800	\$1,800	\$7,200
Building Maintenance Supplies and Repair		\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Printing and Reproduction		\$600	\$600	\$600	\$600	\$2,400
Insurance		\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Staff Training		\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
<b>CONSULTANTS</b>						
Technology facilitator (2 sessions per month)		\$7,200	\$7,200	\$7,200	\$7,200	\$28,800
Art instructor (2 sessions per month)		\$7,200	\$7,200	\$7,200	\$7,200	\$28,800
Socialization facilitator (1 weekly session for 50 weeks)		\$6,500	\$6,500	\$6,500	\$6,500	\$26,000
Nutrition and cooking instructor (2 sessions per month)		\$7,200	\$7,200	\$7,200	\$7,200	\$28,800
Dance and music instructor (1 session per month)		\$4,800	\$4,800	\$4,800	\$4,800	\$19,200
<b>OTHER</b>						
Fuel, maintenance, and transportation		\$960	\$960	\$960	\$960	\$3,840
Marketing and promotion		\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
Program supplies		\$2,657	\$2,657	\$2,657	\$2,657	\$10,628
Food supplies		\$3,600	\$3,600	\$3,600	\$3,600	\$14,400
Janitorial supplies		\$1,200	\$1,200	\$1,200	\$1,200	\$4,800
<b>TOTAL OPERATING EXPENSES</b>		<b>\$51,637</b>	<b>\$51,637</b>	<b>\$51,637</b>	<b>\$51,637</b>	<b>\$206,548</b>
<b>HSA #3</b>						<b>6/20/2018</b>

Mission Neighborhood Centers, Inc.  
 Program: Intergenerational program

**Subcontractor/Capital Expenditures**

<b>SUBCONTRACTORS</b>	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Community Music Center (2 sessions per month)	\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
<b>TOTAL SUBCONTRACTOR COST</b>	\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
<b>EQUIPMENT</b>	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
<b>TOTAL EQUIPMENT COST</b>					
<b>REMODELING</b>	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
<b>TOTAL REMODELING COST</b>					
<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
<b>HSA #4</b>					<b>6/20/2018</b>

SITE CHART				FY: 23-27	
AGENCY: <b>Mission Neighborhood Centers, Inc</b>					
CONTRACT MAILING ADDRESS: <b>362 Capp St San Francisco, CA 94110</b>		Agency's web site:	<a href="http://www.mncsf.org">www.mncsf.org</a>		
DIRECTOR: <b>Richard Ybarra</b>		PHONE NO.: <b>(415) 206-7749</b>			
<b>Program: Intergenerational Program</b>					
<b>SITES: Name of Site</b>	Mission Neighborhood Centers				
Address and Zip	362 Capp St SF, CA 94110				
Phone Number	(415) 206-7750				
Fax Number	(415) 647-6911				
Neighborhood	Mission				
Supervisorial District No.	9				
Site Manager/Coordinator	Aurora Alvarado				
Additional Programs Offered at Site	Community & Social Services, Congregate Meals, Exercise Classes, Computer Classes, Nutrition Classes, Psychoeducation, Health Screenings, Recreational Activities, Food Bank Distribution				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed
	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input type="checkbox"/> Thurs <input type="checkbox"/> Fri	<input type="checkbox"/> Thurs <input type="checkbox"/> Fri	<input type="checkbox"/> Thurs <input type="checkbox"/> Fri	<input type="checkbox"/> Thurs <input type="checkbox"/> Fri
	<input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00 am - 5:00 pm				
Days Closed (list holidays closed)	<ul style="list-style-type: none"> <li>• New Year's Day • Martin Luther King</li> <li>• Presidents Day • Cesar Chavez</li> <li>• Memorial Day</li> <li>• Independence Day • Labor Day</li> <li>• Veterans Day • Thanksgiving • Day after Thanksgiving • Christmas Day</li> </ul>				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

**APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE  
OPENHOUSE**

**INTERGENERATIONAL PROGRAM  
July 1, 2023 – June 30, 2027**

**I. Purpose**

The purpose of this grant is to provide intergenerational programming for older adults and adults with disabilities in San Francisco. The goal is to foster interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement by bringing together older adults and/or adults with disabilities with a generation other than their own.

**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.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
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
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of

	time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Grantee	Openhouse
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
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. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older.
SF DAS 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.
SF-HSA	Human Services Agency of the City and County of San Francisco
Socially Isolated	Having few social relationships and few people to interact with regularly.
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Unduplicated Consumer (UDC)	An individual who participates in intergenerational programming and the grantee reflects consumer participation in SF DAS 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

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

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that are structured, ongoing, and jointly participated by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face-to-face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.
2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target

generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.

3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
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. One unit of service equals one hour of intergenerational programming provided.

<b>Table A- Service Objectives</b>	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	175	180	185	195
Intergenerational Programming Hours	1100	1140	1180	1200

**VIII. Outcome Objectives**

1. Consumers develop new relationships or friendships. Target: 80%.



2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **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 a DAS OCP approved intake form into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS 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 enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

Ella Lee  
ella.lee@sfgov.org  
Contract Manager, HSA OCM  
Or  
Paulo Salta  
Paulo.Salta@sfgov.org  
Program Analyst, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on SF DAS 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS 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; a board of director list and whether services are provided appropriately according to Sections VI and VII.
  
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 Openhouse						Term 7/1/23 - 6/30/27
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>						
If modification, Effective Date of Mod.		No. of Mod.				
<b>Program: Intergenerational program</b>						
Budget Reference Page No.(s)						7/1/23 - 6/30/27
Program Term	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27		Total
<b>Expenditures</b>						
Salaries & Benefits	\$189,977	\$189,977	\$189,977	\$189,977		\$759,908
Operating Expenses	\$14,440	\$14,440	\$14,440	\$14,440		\$57,760
<b>Subtotal</b>	\$204,417	\$204,417	\$204,417	\$204,417		\$817,668
Indirect Percentage (%)	15%	15%	15%	15%		15%
Indirect Cost (Line 16 X Line 15)	\$30,662	\$30,662	\$30,662	\$30,662		\$122,648
Subcontractor/Capital Expenditures	\$35,302	\$35,302	\$35,302	\$35,302		\$141,208
Total Expenditures	\$270,381	\$270,381	\$270,381	\$270,381		\$1,081,524
<b>HSA Revenues</b>						
General Funds	\$270,381	\$270,381	\$270,381	\$270,381		\$1,081,524
<b>TOTAL HSA REVENUES</b>	\$270,381	\$270,381	\$270,381	\$270,381		\$1,081,524
<b>Other Revenues</b>						
Total Revenues						
Full Time Equivalent (FTE)						
Prepared by:					Telephone No.:	
HSA-CO Review Signature:	_____					
<b>HSA #1</b>						<b>6/20/2018</b>

Openhouse  
 Program: Intergenerational program

**Salaries & Benefits Detail**

POSITION TITLE	Agency Totals		HSA Program		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAAS	DAAS	DAAS	DAAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Intergenerational engagement coordinator (IEC)	\$54,600	0.55	100%	0.55	\$30,030	\$30,030	\$30,030	\$30,030	\$120,120
Intergenerational activities coordinator (IAC)	\$54,600	1.00	100%	1.00	\$54,600	\$54,600	\$54,600	\$54,600	\$218,400
Manager of Intergenerational / TGNC programs	\$74,235	0.72	100%	0.72	\$53,516	\$53,516	\$53,516	\$53,516	\$214,064
Director of community engagement programs	\$102,868	0.20	100%	0.20	\$20,168	\$20,168	\$20,168	\$20,168	\$80,672
				-					
				-					
				-					
				-					
<b>TOTALS</b>	<b>\$286,303</b>	<b>1.92</b>	<b>300%</b>	<b>1.92</b>	<b>\$158,314</b>	<b>\$158,314</b>	<b>\$158,314</b>	<b>\$158,314</b>	<b>\$633,256</b>
FRINGE BENEFIT RATE	20%								
EMPLOYEE FRINGE BENEFITS	\$57,261				\$31,663	\$31,663	\$31,663	\$31,663	\$126,652
<b>TOTAL SALARIES &amp; BENEFITS</b>	<b>\$343,564</b>				<b>\$189,977</b>	<b>\$189,977</b>	<b>\$189,977</b>	<b>\$189,977</b>	<b>\$759,908</b>
<b>HSA #2</b>									<b>6/20/2018</b>

Openhouse  
 Program: Intergenerational program

**Operating Expense Detail**

<u>Expenditure Category</u>	TERM					TOTAL
		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Rental of Property						
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,440	\$1,440	\$1,440	\$1,440	\$5,760
Office Supplies, Postage						
Building Maintenance Supplies and Repair						
Printing and Reproduction						
Insurance						
Staff Training						
Staff Travel-(Local & Out of Town)		\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
Rental of Equipment						
<b>CONSULTANTS</b>						
<b>OTHER</b>						
Elder Youth Brunch		\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
<b>TOTAL OPERATING EXPENSES</b>		\$14,440	\$14,440	\$14,440	\$14,440	\$57,760
<b>HSA #3</b>						<b>6/20/2018</b>

Openhouse

Appendix B, Page 4

Program: Intergenerational program

**Subcontractor/Capital Expenditures**

<b>SUBCONTRACTORS</b>	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Little Brothers Friends of the Elderly	\$35,302	\$35,302	\$35,302	\$35,302	\$141,208
<b>TOTAL SUBCONTRACTOR COST</b>	\$35,302	\$35,302	\$35,302	\$35,302	\$141,208
<b>EQUIPMENT</b>	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
<b>TOTAL EQUIPMENT COST</b>					
<b>REMODELING</b>	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
<b>TOTAL REMODELING COST</b>					
<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	\$35,302	\$35,302	\$35,302	\$35,302	\$141,208
<b>HSA #4</b>					<b>6/20/2018</b>

SITE CHART				FY: 2023-2027	
AGENCY: Openhouse					
CONTRACT MAILING ADDRESS: 65 Laguna Street, San Francisco CA 94102		Agency's web site:		<a href="http://www.openhouse-sf.org">www.openhouse-sf.org</a>	
Executive Director: Kathleen Sullivan		PHONE NO.:		415.728.1095	
<b>Program: Intergenerational Program</b>					
<b>SITES: Name of Site</b>	Openhouse Bob Ross LGBT Senior Center	Openhouse Community Space			
Address and Zip	65 Laguna St., San Francisco, CA 94102	75 Laguna St., San Francisco, CA 94102			
Phone Number	415.296.8995	415.296.8995			
Fax Number	415.296.8008	415.296.8008			
Neighborhood	Castro/Hayes Valley/Mission	Castro/Hayes Valley/Mission			
Supervisory District No.	8	8			
Person in Charge:	Kathleen Sullivan Ph.D. (she/her) <i>Executive Director</i>	Kathleen Sullivan Ph.D. (she/her) <i>Executive Director</i>			
Site Manager/Coordinator	Charity Horst (she/her) <i>Operations Manager</i>	Charity Horst (she/her) <i>Operations Manager</i>			
Additional Programs Offered at Site	Community Services; Case Management; ADRC; Health & Wellness	Community Day Services (Club 75); Lifelong Learning; Community Engagement; Friendly Visitor; Volunteer Services; Drag Bingo;			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed			
	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri			
	<input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun			
Hours Open	9:30AM-5:30PM	30AM-5:30PM, M-F 10:00 AM – 4:00 PM, Sat.			
Days Closed (list holidays closed)	Holidays closed: New Year's Day, MLK, President's Day, Memorial Day, Day after SF Pride, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day	Holidays closed: New Year's Day, MLK, President's Day, Memorial Day, Day after SF Pride, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day			
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

## APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

### SELF HELP FOR THE ELDERLY

### INTERGENERATIONAL PROGRAM

**July 1, 2023 – June 30, 2027**

#### I. Purpose

The purpose of this grant is to provide intergenerational programming for older adults and adults with disabilities in San Francisco. The goal is to foster interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement by bringing together older adults and/or adults with disabilities with a generation other than their own.

#### 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.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
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
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of time and the birth years for generations vary from different sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Grantee	Self-Help for the Elderly
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
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. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older.
SF DAS 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.
SF-HSA	Human Services Agency of the City and County of San Francisco
Socially Isolated	Having few social relationships and few people to interact with regularly.
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> )

Unduplicated Consumer (UDC)	An individual who participates in intergenerational programming and the grantee reflects consumer participation in SF DAS GetCare through enrollment.
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### 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

### V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

### VI. Description of Services and Program Requirements

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that are structured, ongoing, and jointly participated by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face-to-face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.

2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.
3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
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. One unit of service equals one hour of intergenerational programming provided.

<b>Table A- Service Objectives</b>	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	75	75	75	75
Intergenerational Programming Hours	150	150	150	150

**VIII. Outcome Objectives**

1. Consumers develop new relationships or friendships. Target: 80%.
2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%
4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **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 a DAS OCP approved intake form into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS 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 enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

Tahir Shaikh  
Tahir.Shaikh@sfgov.org  
Contract Manager, HSA OCM

Or

Paulo Salta  
Paulo.Salta@sfgov.org  
Program Analyst, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on SF DAS 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS 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; a board of director list and whether services are provided appropriately according to Sections VI and VII.
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>SELF-HELP FOR THE ELDERLY</b>	7/1/23 - 6/30/27				
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
<b>Program: Intergenerational Program</b>					
Budget Reference Page No.(s)					Total
Program Term	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
<b>Expenditures</b>					
Salaries & Benefits	\$66,518	\$66,518	\$66,518	\$66,518	\$266,072
Operating Expenses	\$8,951	\$10,125	\$10,125	\$10,125	\$39,326
<b>Subtotal</b>	<b>\$75,469</b>	<b>\$76,643</b>	<b>\$76,643</b>	<b>\$76,643</b>	<b>\$305,398</b>
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$11,320	\$11,496	\$11,496	\$11,496	\$45,808
Subcontractor/Capital Expenditures	\$8,850	\$7,500	\$7,500	\$7,500	\$31,350
<b>Total Expenditures</b>	<b>\$95,639</b>	<b>\$95,639</b>	<b>\$95,639</b>	<b>\$95,639</b>	<b>\$382,556</b>
<b>HSA Revenues</b>					
General Funds	\$95,639	\$95,639	\$95,639	\$95,639	\$382,556
<b>TOTAL HSA REVENUES</b>	<b>\$95,639</b>	<b>\$95,639</b>	<b>\$95,639</b>	<b>\$95,639</b>	<b>\$382,556</b>
<b>Other Revenues</b>					
In-Kind	6505.2	6505.2	6505.2	6505.2	\$26,021
<b>Total Revenues</b>	<b>\$102,144</b>	<b>\$102,144</b>	<b>\$102,144</b>	<b>\$102,144</b>	<b>\$408,577</b>
Full Time Equivalent (FTE)					
Prepared by: Leny Nair	Telephone No.: 415-677-7682				
HSA-CO Review Signature: _____					
<b>HSA #1</b>	<b>6/20/2018</b>				

SELF-HELP FOR THE ELDERLY  
 Program: Intergenerational Program

Appendix B, Page 2  
 Date:7/5/23

**Salaries & Benefits Detail**

POSITION TITLE	Agency Totals		HSA Program		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS	DAS	DAS	DAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Project Coordinator	\$54,080	1.00	100%	1.00	\$54,080	\$54,080	\$54,080	\$54,080	\$216,320
<b>TOTALS</b>	<b>\$54,080</b>	<b>1.00</b>	<b>100%</b>	<b>1.00</b>	<b>\$54,080</b>	<b>\$54,080</b>	<b>\$54,080</b>	<b>\$54,080</b>	<b>\$216,320</b>
FRINGE BENEFIT RATE	23%								
EMPLOYEE FRINGE BENEFITS	\$12,438				\$12,438	\$12,438	\$12,438	\$12,438	\$49,752
<b>TOTAL SALARIES &amp; BENEFITS</b>	<b>\$66,518</b>				<b>\$66,518</b>	<b>\$66,518</b>	<b>\$66,518</b>	<b>\$66,518</b>	<b>\$266,072</b>
<b>HSA #2</b>									<b>6/20/2018</b>

SELF-HELP FOR THE ELDERLY  
 Program: Intergenerational Program

Appendix B, Page 3  
 Date: 7/5/23

**Operating Expense Detail**

<u>Expenditure Category</u>	TERM					TOTAL
		<u>7/1/23 - 6/30/24</u>	<u>7/1/24 - 6/30/25</u>	<u>7/1/25 - 6/30/26</u>	<u>7/1/26 - 6/30/27</u>	<u>7/1/23 - 6/30/27</u>
Rental of Property		\$6,000	\$6,000	\$6,000	\$6,000	\$24,000
Utilities(Elec, Water, Gas, Phone, Garbage)		\$50	\$50	\$50	\$50	\$200
Office Supplies, Postage		\$100	\$100	\$100	\$100	\$400
Building Maintenance Supplies and Repair						\$0
Printing and Reproduction		\$200	\$200	\$200	\$200	\$800
Insurance		\$600	\$600	\$600	\$600	\$2,400
Staff Training						
Staff Travel-(Local & Out of Town)						
Rental of Equipment						
<b>CONSULTANTS</b>						
<b>OTHER</b>						
Cellphone Allowance/ZOOM Account		\$330	\$500	\$500	\$500	\$1,830
Stipends to graduate students to teach the Elderly		\$1,671	\$2,675	\$2,675	\$2,675	\$9,696
<b>TOTAL OPERATING EXPENSES</b>		<u>\$8,951</u>	<u>\$10,125</u>	<u>\$10,125</u>	<u>\$10,125</u>	<u>\$39,326</u>
<b>HSA #3</b>						<b>6/20/2018</b>



SELF-HELP FOR THE ELDERLY  
 Program: Intergenerational Program

Appendix B, Page 4  
 Date: 7/5/23

**Subcontractor/Capital Expenditures**

<b>SUBCONTRACTORS</b>	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Subcontractor 1					\$0
Subcontractor 2					\$0
					\$0
					\$0
<b>TOTAL SUBCONTRACTOR COST</b>	\$0	\$0	\$0	\$0	\$0

<b>EQUIPMENT</b>		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Units	ITEM/DESCRIPTION					
1	Computer/Laptop	\$1,350				\$1,350
15	Ipads for students to train the seniors	\$7,500	\$7,500	\$7,500	\$7,500	\$30,000
						\$0
						\$0
						\$0
<b>TOTAL EQUIPMENT COST</b>		\$8,850	\$7,500	\$7,500	\$7,500	\$31,350

<b>REMODELING</b>		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Description:						
Remodel A						\$0
						\$0
						\$0
						\$0
<b>TOTAL REMODELING COST</b>		\$0	\$0	\$0	\$0	\$0

<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	\$8,850	\$7,500	\$7,500	\$7,500	\$31,350
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HSA #4

6/20/2018



**APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE  
SEQUOIA LIVING**

**INTERGENERATIONAL PROGRAM**

**July 1, 2023 – June 30, 2027**

**I. Purpose**

The purpose of this grant is to provide intergenerational programming for older adults and adults with disabilities in San Francisco. The goal is to foster interactions and relationships that are mutually beneficial through regularly planned activities and joint engagement by bringing together older adults and/or adults with disabilities with a generation other than their own.

**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.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism.
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
Generation	Individuals born and living at about the same time, regarded collectively. Generations are different lengths of time and the birth years for generations vary from different

	sources. For the purpose of this grant, the grantee must define and document the range of birth years for the participating generations in the program policy and procedures, which are subject to DAS OCP review and approval.
Grantee	Sequoia Living
Intergenerational Program	A program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The activities and engagement should be structured, ongoing, and jointly participated in by each of the generations involved.
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. Used by consumers to self-identify their income status and is not used as a means test to qualify for the program.
OCM	Office of Contract Management, Human Services Agency
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years of age or older.
SF DAS 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.
SF-HSA	Human Services Agency of the City and County of San Francisco
Socially Isolated	Having few social relationships and few people to interact with regularly.
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> )
Unduplicated Consumer (UDC)	An individual who participates in intergenerational programming and the grantee reflects consumer participation in SF DAS 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

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

The details of the sites and operation hours are as attached in the Site Chart (Appendix F).

### **VI. Description of Services and Program Requirements**

1. Grantee will develop and implement an intergenerational program that brings older adults and/or adults with disabilities together with another generation through regularly planned activities and joint engagement. The intergenerational programming offered by the grantee will consist of activities and engagement that are structured, ongoing, and jointly participated by each of the generations involved. The programming offered should also consist of the following key elements:
  - a. Support relationship building between the participating generations
  - b. Create reciprocity between the participating generations
  - c. Offer activities and interactions that are face-to-face; online platforms may be used to provide programming, but not as a replacement for in-person activities when in person gatherings are permissible and do not compromise the health and safety of program participants.
2. Grantee will develop and maintain program policies and procedures that align with city, state, and local regulatory agencies, including DAS OCP. The grantee will ensure that the program policies and procedures define the range of birth years for each of the target generations participating in the program. DAS OCP will review and approve the defined range of birth years for participating generations.

3. Grantee will develop and submit a site chart to DAS OCP. The site chart and any subsequent changes to the site chart are subject to DAS OCP approval.
4. Grantee will promote its intergenerational program to eligible consumers and participants in the community through targeted outreach. This can be accomplished in a variety of ways and may include providing information at community organizations, congregate meal sites, health clinics, schools, in newsletters/publications and social media when appropriate, and on the grantee’s website(s).
5. Grantee shall ensure adequate and culturally competent staffing to administer the program, deliver quality services to meet the needs of the consumer, and adhere to all the program standards.
6. Grantee will administer an annual consumer satisfaction survey using a survey tool, pre-approved by DAS OCP. The grantee will share the results with DAS OCP by March 15 each grant year or on a mutually agreed upon date between DAS OCP and the grantee.
7. Grantee will ensure that units of service provided are tracked and distinguishable.
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. One unit of service equals one hour of intergenerational programming provided.

<b>Table A- Service Objectives</b>	FY 23-24	FY 24-25	FY 25-26	FY 26-27
Unduplicated Consumers (UDC)	230	230	230	230
Intergenerational Programming Hours	700	700	700	700

**VIII. Outcome Objectives**

1. Consumers develop new relationships or friendships. Target: 80%.
2. Consumers feel like valued members of their neighborhood and/or community through program opportunities to share knowledge, use skills, share stories, etc. Target: 80%
3. Consumers feel a greater sense of social connection. Target: 80%

4. Consumers rate the quality of intergenerational programming as good or excellent. Target: 80%

Based on a consumer survey and a sample size of at least 60% of unduplicated consumer enrollment at the time the grantee administers the survey.

## **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 a DAS OCP approved intake form into the SF DAS GetCare database in accordance with DAS OCP policy memorandum.
2. Grantee will enter into the SF DAS 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 enrolled
  - Number of intergenerational programming hours
4. Grantee will enter an annual metrics report in the CARBON database by the 15th of the month following the end of the program (i.e. service and outcome objectives achieved). This report will also include accomplishments and challenges encountered by the grantee.
5. Grantee shall develop and deliver bi-annual summary reports of SOGI data collected in the year as requested by SF-HSA, DAS, and OCP. The due dates for submitting the bi-annual summary reports are July 10 and January 10.
6. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA, DAS, and OCP.
7. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. The grantee will maintain evidence of staff completion of this training.
8. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
9. Grantee will develop a grievance policy consistent with DAS OCP policy memorandum.
10. Grantee will assure that services delivered are consistent with professional standards for this service.
11. For assistance with reporting requirements or submission of reports, contact:

Tara Alvarez

[tara.alvarez@sfgov.org](mailto:tara.alvarez@sfgov.org)

Contract Manager, HSA OCM

Or

Paulo Salta

[Paulo.Salta@sfgov.org](mailto:Paulo.Salta@sfgov.org)

Program Analyst, DAS OCP

## **X. Monitoring Activities**

1. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on SF DAS 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 security awareness training; program operation, which includes a review of a written policies and procedures manual of all DAS 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; a board of director list and whether services are provided appropriately according to Sections VI and VII.
  
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>Sequoia Living</b>	7/1/23 - 6/30/27				
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. _____ No. of Mod. _____					
<b>Program: Intergenerational Program</b>					
Budget Reference Page No.(s)					Total
Program Term	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
<b>Expenditures</b>					
Salaries & Benefits	\$118,380	\$118,380	\$118,380	\$118,380	\$473,520
Operating Expenses	\$21,149	\$21,149	\$21,149	\$21,149	\$84,596
<b>Subtotal</b>	<b>\$139,529</b>	<b>\$139,529</b>	<b>\$139,529</b>	<b>\$139,529</b>	<b>\$558,116</b>
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost (Line 16 X Line 15)	\$20,929	\$20,929	\$20,929	\$20,929	\$83,716
Subcontractor/Capital Expenditures	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
<b>Total Expenditures</b>	<b>\$170,458</b>	<b>\$170,458</b>	<b>\$170,458</b>	<b>\$170,458</b>	<b>\$681,832</b>
<b>HSA Revenues</b>					
General Funds	\$170,458	\$170,458	\$170,458	\$170,458	\$681,832
<b>TOTAL HSA REVENUES</b>	<b>\$170,458</b>	<b>\$170,458</b>	<b>\$170,458</b>	<b>\$170,458</b>	<b>\$681,832</b>
<b>Other Revenues</b>					
<b>Total Revenues</b>	<b>\$170,458</b>	<b>\$170,458</b>	<b>\$170,458</b>	<b>\$170,458</b>	<b>\$681,832</b>
Full Time Equivalent (FTE)	1	1	1	1	
Prepared by:	Telephone No.:				
HSA-CO Review Signature:					
<b>HSA #1</b>	<b>6/20/2018</b>				

Sequoia Living

Appendix B, Page 2

Program: Intergenerational Program

**Salaries & Benefits Detail**

POSITION TITLE	Agency Totals		HSA Program		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS	DAS	DAS	DAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
Volunteer Coordinator	\$87,689	1.00	100%	1.00	\$87,689	\$87,689	\$87,689	\$87,689	\$350,756
<b>TOTALS</b>	\$87,689	1.00	100%	1.00	\$87,689	\$87,689	\$87,689	\$87,689	\$350,756
FRINGE BENEFIT RATE	35%								
EMPLOYEE FRINGE BENEFITS	\$30,691				\$30,691	\$30,691	\$30,691	\$30,691	\$122,764
<b>TOTAL SALARIES &amp; BENEFITS</b>	\$118,380				\$118,380	\$118,380	\$118,380	\$118,380	\$473,520
<b>HSA #2</b>									<b>6/20/2018</b>

Sequoia Living					Appendix B, Page 3
Program: Intergenerational Program					
<b>Operating Expense Detail</b>					
					TOTAL
<u>Expenditure Category</u>	<u>7/1/23 - 6/30/24</u>	<u>7/1/24 - 6/30/25</u>	<u>7/1/25 - 6/30/26</u>	<u>7/1/26 - 6/30/27</u>	<u>7/1/23 - 6/30/27</u>
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Garbage)					
Office Supplies, Postage	\$400	\$400	\$400	\$400	\$1,600
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Staff Training					
Staff Travel-(Local & Out of Town)	\$250	\$250	\$250	\$250	\$1,000
Rental of Equipment					
<b>CONSULTANTS</b>					
<b>OTHER</b>					
Snacks	\$3,000	\$3,000	\$3,000	\$3,000	\$12,000
Art and Educational program Supplies	\$3,305	\$3,305	\$3,305	\$3,305	\$13,220
Pangea/AASC	\$815	\$815	\$815	\$815	\$3,260
Visual Arts Programming	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
Technology	\$1,879	\$1,879	\$1,879	\$1,879	\$7,516
ESL Instructor Stipends	\$1,500	\$1,500	\$1,500	\$1,500	\$6,000
<b>TOTAL OPERATING EXPENSES</b>	<b>\$21,149</b>	<b>\$21,149</b>	<b>\$21,149</b>	<b>\$21,149</b>	<b>\$84,596</b>
<b>HSA #3</b>					<b>6/20/2018</b>

Sequoia Living Appendix B, Page 4  
 Program: Intergenerational Program

**Subcontractor/Capital Expenditures**

<b>SUBCONTRACTORS</b>	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Voice of Witness	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
<b>TOTAL SUBCONTRACTOR COST</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$40,000</b>

<b>EQUIPMENT</b>		7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Units	ITEM/DESCRIPTION					
<b>TOTAL EQUIPMENT COST</b>		<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

<b>REMODELING</b>	7/1/23 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	7/1/23 - 6/30/27
Description:					
<b>TOTAL REMODELING COST</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$40,000</b>
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HSA #4 6/20/2018



Date: 3/19/21		SITE CHART - Intergenerational Program				FY: 23-27
AGENCY: Northern California Presbyterian Homes and Services						
CONTRACT MAILING ADDRESS: 1525 Post Street, San Francisco, CA 94109				Agency's web site: <a href="https://sequoialiving.org/">https://sequoialiving.org/</a>		
DIRECTOR: Sue Dichter				PHONE NO.: 267-258-1255		
<b>Program:</b> Intergenerational Program						
<b>SITES: Name of Site</b>						
Address and Zip						
Phone Number						
Fax Number						
Neighborhood						
Supervisorial District No.						
Program Coordinator						
Additional Programs Offered at Site						
Days Open - Services staff available						
Hours Open						
Days Closed (list holidays closed)						
ADA Accessible						

Date: 3/19/21		SITE CHART - Intergenerational Program			FY: 23-27	
AGENCY: Sequoia Living						
CONTRACT MAILING ADDRESS: 1525 Post Street, San Francisco, CA 94109				Agency's web site: <a href="https://sequoialiving.org/">https://sequoialiving.org/</a>		
DIRECTOR: Sue Dichter			PHONE NO.: 267-258-1255			
<b>Program:</b>						
<b>Intergenerational Program</b>						
<b>SITES: Name of Site</b>						
	Mission Dolores	Duboce	Sanchez	Woodside		
<b>Address and Zip</b>						
	1855 15th St. SF, 94103	462 Duboce St. SF, 94117	25 Sanchez St. SF, 94114	Taryn Patters+E10on		
<b>Phone Number</b>						
	415-236-0831	415-832-9873	415-890-0164	415-275-1343		
<b>Fax Number</b>						
	415-437-6711	415-522-0207	415-522-0207	415-682-7103		
<b>Neighborhood</b>						
	Mission	Mission	Mission	Forest Hill		
<b>Supervisorial District No.</b>						
	8	8	8	7		
<b>Program Coordinator</b>						
	Bronwyn Peterson	Bronwyn Peterson	Bronwyn Peterson	Bronwyn Peterson		
<b>Additional Programs Offered at Site</b>						
	Affordable housing & Resident Service Coordination	Affordable housing & Resident Service Coordination	Affordable housing & Resident Service Coordination	Affordable housing & Resident Service Coordination		
<b>Days Open - Services staff available</b>						
	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed		
	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri		
<b>Hours Open</b>						
	8:30 - 4:30	8:30 - 4:30	8:30 - 4:30	8:30 - 4:30		
<b>Days Closed (list holidays closed)</b>						
	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas	New Year's Day, MLK Day, Presidents' Day, Social Work Appreciation Retreat, Memorial Day, July 4th, Labor Day, Thanksgiving, Christmas		
<b>ADA Accessible</b>						
	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		