



**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)



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

**MEMORANDUM**

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** KELLY DEARMAN, EXECUTIVE DIRECTOR

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

**DATE:** WEDNESDAY JULY 19, 2023

**SUBJECT:** NEW GRANT: **MULTIPLE VENDORS (NON-PROFIT)** TO PROVIDE VOLUNTEER VISITOR SERVICES

DS  
*EL*

**GRANT TERM:** 7/1/2023 - 6/30/2027

<b>GRANT AMOUNT:</b>	New	Contingency	Total
	\$400,000	\$40,000	\$440,000

**ANNUAL AMOUNT** See table below

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>Funding</b>					
<b>FUNDING:</b>	\$400,000			\$40,000	\$440,000
<b>PERCENTAGE:</b>	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into grants with multiple vendors for the period of July 1, 2023 through June 30, 2027, in an amount of \$400,000, plus a 10% contingency for a total amount not to exceed \$440,000. The purpose of the grant is to provide Volunteer Visitor services.

	FY 23/24	FY 24/25	FY 25/26	FY 26/27	Total	Contingency	Not to Exceed
Lighthouse for the Blind & Visually Impaired	\$24,645	\$24,645	\$24,645	\$24,645	\$98,580	\$9,858	\$108,438
Little Brothers-Friends of the Elderly	\$75,355	\$75,355	\$75,355	\$75,355	\$301,420	\$30,142	\$331,562
<b>Total</b>	<b>\$100,000</b>	<b>\$100,000</b>	<b>\$100,000</b>	<b>\$100,000</b>	<b>\$400,000</b>	<b>\$40,000</b>	<b>\$440,000</b>

### Background

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DAS recognizes and the 2022 Dignity Fund Community Needs Assessment (DFCNA) reinforced that social isolation remains a concern for many older adults and adults with disabilities. Social isolation often contributes to loneliness and was exacerbated by COVID-19. The DFCNA highlighted the need to continue providing programming that creates opportunities for older adults and adults with disabilities to socialize and reduce social isolation. In place since 2019, DAS continues to fund the Volunteer Visitor program to meet the needs of the community and address social isolation.

Social isolation was also one of the five equity factors considered in DFCNA. Volunteer visitor programs will not only help to mitigate social isolation, they align with a key priority for DAS, which is to address equity factors in service delivery.

### Services to be Provided

The grantees will provide volunteer visitor programs that match and connect a volunteer with an older adult and/or adult with a disability who has enrolled in grantees' volunteer visitor program. The matching process implemented by the grantees will take into account the interests and needs of the older adult and/or adult with a disability to promote a successful pairing and relationship building. Volunteer visits will be scheduled on a regular basis with consideration given to the availability of both the older adult and/or adult with a disability and the volunteer visitor. Visits will be at a mutually agreed upon time and if somewhere other than the home of the older adult and/or adult with a disability, at a mutually agreed upon place. The volunteer visitor will visit the older adult or adult with a disability enrolled in the program that they connect with at least twice per month and each visit will be at least one hour in duration. The grantees will recruit, screen and train volunteer visitors. A minimum of a six-month commitment by the volunteer visitor is required.

**Selection**

Grantee was selected through Request for Proposals #1057 which was competitively bid in March 2023

**Funding**

Funding for this grant is provided through County General Funds.

**ATTACHMENTS**

**Lighthouse for the Blind & Visually Impaired**

Appendix A – SCOPE of Services

Appendix B – Budget

Appendix F – Site Location

**Little Brothers-Friends of the Elderly**

Appendix A – SCOPE of Services

Appendix B – Budget

Appendix F – Site Location

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**Appendix A – Services to be Provided  
Lighthouse for the Blind and Visually Impaired  
Volunteer Visitor Program  
July 1, 2023 – June 30, 2027**

**I. Purpose of Grant**

The purpose of this grant is to provide a visitor program that will match volunteers with older adults and/or adults with disabilities living in the City and County of San Francisco who may be socially isolated or at heightened risk of isolation.

**II. Definitions**

Adult Protective Services (APS)	The unit within DAS that accepts and responds to reports of abuse, neglect, exploitation, and self-neglect involving older adults and adults with disabilities
Adult with a Disability	A person 18 to 59 years of age living with a disability
At Risk for 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, transferring, 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 Online System
City	City and County of San Francisco, a municipal corporation
Client Participant	An older adult or adult with a disability participating in the Volunteer Visitor Program and reflected in SF DAS GetCare through program enrollment; used interchangeably with “unduplicated consumer”
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
Controller	Controllers of the City and County of San Francisco or designated agent
DAS	Department of Disability and Aging Services of the San Francisco Human Services Agency

DAS Integrated Intake and Referral Unit	A unit within DAS that is equipped to receive calls from the community and provide information, referrals, and assistance for older adults and adults with disabilities, caregivers, and community-based organizations
Dignity Fund (Fund)	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. DAS will expend monies in the Fund solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities
Dignity Fund Community Needs Assessment (DFCNA)	A community needs assessment report required every four years by the City Charter Amendment for the Fund. The findings from each DFCNA inform an allocation plan for the expenditure of the Fund. The first DFCNA was completed in fiscal year 2017-2018
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
Grantee	LightHouse for the Blind and Visually Impaired
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
Older Adult	Person who is 60 years of age or older
Senior	Person who is 60 years of age or older; used interchangeably with "older adult."

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
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.)
Three Item UCLA Loneliness Scale	A scale comprised of three questions that measures three dimensions of loneliness. <a href="https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/">https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2394670/</a>
Unduplicated Consumer (UDC)	An older adult or adult with a disability participating in the Volunteer Visitor Program and reflected in DASGetCare through program enrollment; used interchangeably with “client participant.”
Volunteer Visitor	An adult volunteer screened and trained by the grantee to provide in person visits to an older adult and/or adult with disability enrolled in the Volunteer Visitor Program.

### 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:

- Persons with low income
- Persons who are socially isolated
- Persons with limited English-speaking proficiency
- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

### IV. Eligibility for Program Enrollment

1. A resident of San Francisco; and
2. A person who is an older adult or an adult with a disability.

### V. Description of Services

1. Grantee will provide the Volunteer Visitor Program for older adults and/or adults with disabilities living in the City and County of San Francisco who may be socially isolated or at heightened risk of isolation. The program will connect an older adult or adult with a disability, hereinafter also known as client participant, to an adult volunteer.

2. A client participant will receive connection to social engagement or other resources at least twice per month, including but not limited to, in-person, phone or video visits, personal correspondence, or information & referral.
3. Grantee will connect client participants with volunteer visitors through a matching process. The policy and procedures for the matching process conducted by the grantee will promote successful pairings and relationship building. A minimum of a six-month commitment by the volunteer visitor is required.
4. Grantee will have written guidelines and expectations for both the client participant and volunteer visitor.
5. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable, including the number of visits provided to client participants by volunteer visitors.
6. Grantee will conduct outreach for its Volunteer Visitor Program aimed at reaching the target population and at recruiting volunteer visitors.
7. Grantee will recruit, screen (including a background check), and train volunteer visitors. The screening process for volunteer visitors will include, but is not limited to, a background check for all volunteer visitors.
8. Grantee will ensure the volunteer training is comprehensive and includes, but is not limited to, how to report suspected abuse or self-neglect to APS, an overview of the services available at DAS Intake and Referral Unit, and the general role the unit has in serving older adults and adults with disabilities. Training must be provided before a volunteer begins visiting a client participant.
9. Grantee will have readily available resources that volunteers can access as needed to help and support them in their role as a volunteer visitor.
10. Grantee will conduct an in-home or phone assessments of the client participant prior to connecting a client participant with a volunteer visitor to confirm that the visitor program is an appropriate service and to ensure the safety of both the client participate and volunteer visitor.
11. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all client participants enrolled in the Volunteer Visitor Program.
12. Grantee shall ensure adequate and culturally competent paid and volunteer staffing to administer the program, deliver quality services to meet the needs of the client participants, and adhere to all DAS program standards.
13. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules when applicable.
14. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAS policy memoranda manual.

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

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

## VII. Service Objectives

On an annual basis, Grantee will meet the following Service Objectives for the Volunteer Visitor Program detailed in Table A below:

Service Objectives Summary Table	
Objective	Annual Target
The number of client participants/unduplicated consumers enrolled	35
The number volunteer visitors, recruited, screened	60
The number of trained volunteer visitors connected to client participants	40
The number of visits provided to client participants by volunteer visitors	840

## VIII. Outcome Objectives

On an annual basis, Grantee will meet the following Outcome Objectives:

1. At least 75% of the surveyed client participants will report that participation in the volunteer visitor program has supported them to develop a meaningful relationship or friendship.\*
2. At least 75% of the surveyed client participants will report that participation in the Volunteer Visitor Program has decreased feelings of loneliness.\*
3. At least 75% of participants will report enhanced feelings of connection through opportunities presented through/by the program.\*
4. At least 75% or more of the client participants will participate in the Volunteer Visitor Program for six months or more.

*\*Based on a survey created by the grantee with input from DAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

## IX. Reporting Requirements

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.
2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAS provided or DAS approved intake form into the SF DAS GetCare database in accordance with DAS policy.
3. Grantee will enter into the SF DAS GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
  - Number of unduplicated consumers served during the month.
  - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives



and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.

6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAS by March 15 each grant year or a mutually agreed upon date between DAS and the Grantee.
8. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA. The due dates for submitting the bi-annual summary reports are January 10<sup>th</sup> (July 1<sup>st</sup> through December 31<sup>st</sup> data) and July 10<sup>th</sup> (January 1<sup>st</sup> through June 30<sup>th</sup> data).
9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAS.

For assistance with reporting requirements or submission of reports, contact:

Erica Maybaum  
Program Manager

DAS, Office of Community partnerships  
Erica.Maybaum@SFgov.org

Patrick Garcia  
Contract Manager

HSA, Office of Contract Management  
Patrick.Garcia@SFgov.org

## **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 the [California Department of Aging \(CDA\) 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 V, VI, VII, VIII and IX.
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>Lighthouse for the Blind &amp; Visually Impaired</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: Volunteer Visitor 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>DAS Expenditures</b>					
Salaries & Benefits	\$20,830	\$20,830	\$20,830	\$20,830	\$83,320
Operating Expenses	\$600	\$600	\$600	\$600	\$2,400
<b>Subtotal</b>	\$21,430	\$21,430	\$21,430	\$21,430	\$85,720
Indirect Percentage (%)	15%	15%	15%	15%	15%
Indirect Cost	\$3,215	\$3,215	\$3,215	\$3,215	\$12,860
Capital/Subcontractor Expenditures					
<b>Total DAS Expenditures</b>	\$24,645	\$24,645	\$24,645	\$24,645	\$98,580
<b>DAS Revenues</b>					
Funding	\$24,645	\$24,645	\$24,645	\$24,645	\$98,580
<b>Total DAS Revenue</b>	\$24,645	\$24,645	\$24,645	\$24,645	\$98,580
<b>Non DAS Revenues</b>					
<b>Total Non DAS Revenue</b>					
<b>TOTAL DAS AND NON DAS REVENUE</b>	\$24,645	\$24,645	\$24,645	\$24,645	\$98,580
Full Time Equivalent (FTE)	0.27	0.27	0.27	0.27	1.10
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Program: Volunteer Visitor Program

Appendix B, Page 2

**Salaries & Benefits Detail**

DAS Salaries & Benefits	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	(Total)
	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
Position Title									
Volunteer Engagement Coordinator	\$54,600	0.25	100%	0.25	\$13,650	\$13,650	\$13,650	\$13,650	\$54,600
Director, Connections	\$99,750	0.02	100%	0.02	\$2,373	\$2,373	\$2,373	\$2,373	\$9,492
<b>Totals</b>	<b>\$154,350</b>	<b>0.27</b>	<b>200%</b>	<b>0.27</b>	<b>\$16,023</b>	<b>\$16,023</b>	<b>\$16,023</b>	<b>\$16,023</b>	<b>\$64,092</b>
Fringe Benefits Rate	30%								
Employee Fringe Benefits	\$46,305				\$4,807	\$4,807	\$4,807	\$4,807	\$19,228
<b>Total DAS Salaries and Benefits</b>	<b>\$200,655</b>				<b>\$20,830</b>	<b>\$20,830</b>	<b>\$20,830</b>	<b>\$20,830</b>	<b>\$83,320</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					
Building Maintenance Supplies and Repair					
Printing and Reproduction					
Insurance					
Staff Training					
Staff Travel	\$100	\$100	\$100	\$100	\$400
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
Volunteer Background Checks	\$500	\$500	\$500	\$500	\$2,000
<b>Total DAS Operating Expenses</b>	<b>\$600</b>	<b>\$600</b>	<b>\$600</b>	<b>\$600</b>	<b>\$2,400</b>
<b>HSA #3</b>					

**APPENDIX F - SITE CHART**

HSA /DAS

AGENCY: Lighthouse for the Blind and Visually Impaired

TERM: July 1, 2023 – June 30, 2027

GRANT: Volunteer Visitor Program

DIRECTOR: Scott Blanks

CA PHONE NUMBER: 415-694-7320

<b>SITES:</b>	Lighthouse for the Blind and Visually Impaired				
<b>Name of Site</b>					
Address and Zip	1155 Market St. (Floor 10) San Francisco, CA 94103				
Phone Number	415-694-7320				
Neighborhood	Civic Center				
District #	6				
Person in Charge	Scott Blanks				
Site Manager	Allyson Ferrari				
Programs Offered at Site	Community Services; Technology Training; Volunteer Visitor Program, Intergenerational Programs.				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8am – 5pm				
Hours of <u>scheduled</u> programming	<b>8am – 5pm</b>				
Days closed	New Years Day, Martin Luther King Jr Day, President's Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Thanksgiving and the Day After, and a Winter Break - usually between Christmas to New Years Day				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Appendix A – Services to be Provided  
Little Brothers - Friends of the Elderly  
Volunteer Visitor Program  
July 1, 2023 – June 30, 2027**

**I. Purpose of Grant**

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Grantee	Little Brothers- Friends of the Elderly (LBFE)
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.
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- Persons who are socially isolated
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- Persons from communities of color
- Persons who identify as LGBTQ+
- Persons at risk of institutionalization

### IV. Eligibility for Program Enrollment

1. A resident of San Francisco; and
2. A person who is an older adult or an adult with a disability.

### V. Description of Services

1. Grantee will provide the Volunteer Visitor Program for older adults and/or adults with disabilities living in the City and County of San Francisco who may be socially isolated or at heightened risk of isolation. The program will

- connect an older adult or adult with a disability, hereinafter also known as client participant, to an 18-22 year old visiting volunteer.
2. A client participant will receive connection to in person social engagement at least twice per month for at least one hour each visit, for at least six months and supplemented with a phone call, when needed. Visits could include accompaniment to outings or events, help with tasks (e.g., shopping, organizing, exercising, and assisting with rides to community spaces (not in personal vehicles) or medical appointments).
  3. Pending any health directives or mandates by the Department of Public Health, visits could pivot to taking place by phone, email, or mail.
  4. Grantee will connect client participants with volunteer visitors through a matching process. The policy and procedures for the matching process conducted by the grantee will promote successful pairings and relationship building. A minimum of a six-month commitment by the volunteer visitor is required.
  5. Grantee will have written guidelines and expectations for both the client participant and volunteer visitor.
  6. Grantee will ensure that units of service provided through this grant agreement are tracked and distinguishable, including the number of visits provided to client participants by volunteer visitors.
  7. Grantee will conduct outreach for its Volunteer Visitor Program aimed at reaching the target population and at recruiting volunteer visitors.
  8. Grantee will recruit, screen (including background check), and train volunteer visitors. The screening process for volunteer visitors will include, but is not limited to, a background check for all volunteer visitors.
  9. Grantee will ensure the volunteer training is comprehensive and includes, but is not limited to, how to report suspected abuse or self-neglect to APS, an overview of the services available at DAS Intake and Referral Unit, and the general role the unit has in serving older adults and adults with disabilities. Training must be provided before a volunteer begins visiting a client participant.
  10. Grantee will have readily available resources that volunteers can access as needed to help and support them in their role as a volunteer visitor.
  11. Grantee will conduct an in-home assessment of the client participant prior to connecting a client participant with a volunteer visitor to confirm that the visitor program is an appropriate service and to ensure the safety of both the client participate and volunteer visitor.
  12. Grantee will administer the Three Item UCLA Loneliness Scale questionnaire to all client participants enrolled in the Volunteer Visitor Program.
  13. Grantee shall ensure adequate and culturally competent paid and volunteer staffing to administer the program, deliver quality services to meet the needs of the client participants, and adhere to all DAS program standards.
  14. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules when applicable.

15. Grantee will have policy and procedures that are compliant with local/city, state, and federal regulatory agencies, including the DAS policy memoranda manual.
16. Volunteer visitors will provide quarterly emails or phone calls to staff on how visits are going, monthly logs of visits, and notifications to staff if client is ill, needs assistance, or appears to be deteriorating in a way the requires support.

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

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

#### **VII. Service Objectives**

On an annual basis, Grantee will meet the following Service Objectives for the Volunteer Visitor Program detailed in the table below:

Service Objectives Summary Table	
Service Objective	Annual Target
The number of client participants/unduplicated consumers enrolled	75
The number volunteer visitors, recruited, screened, and trained	75
The number of volunteer visitors connected to client participants	50
The number of visits provided to client participants by volunteer visitors	1200

#### **VIII. Outcome Objectives**

On an annual basis, Grantee will meet the following Outcome Objectives:

1. At least 75% of the surveyed client participants will report that participation in the volunteer visitor program has supported them to develop a meaningful relationship or friendship.\*
2. At least 75% of the surveyed client participants will report that participation in the Volunteer Visitor Program has decreased feelings of loneliness.\*
3. At least 75% of participants will report enhanced feelings of connection through opportunities presented through/by the program.\*
4. At least 75% or more of the client participants will participate in the Volunteer Visitor Program for six months or more.

*\*Based on a survey created by the grantee with input from DAS and a sample size of at least 60% of the enrolled unduplicated consumer.*

#### **IX. Reporting Requirements**

1. Grantee will provide a monthly report of activities as described in Section V. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month.

2. Grantee will enroll eligible consumers into the program funded through this grant agreement by entering the consumer data obtained from consumers using the DAS provided or DAS approved intake form into the SF DAS GetCare database in accordance with DAS policy.
3. Grantee will enter into the SF DAS GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
4. Grantee will enter monthly reports into the CARBON database system that includes the following information:
  - Number of unduplicated consumers served during the month.
  - Number of units of service provided during the month.
5. Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII and VIII, Service Objectives and Outcome Objectives, respectively. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year.
6. Grantee shall issue a fiscal closeout report at the end of the fiscal year. The Grantee will submit the report to SF-HSA through CARBON system no later than July 31 each grant year.
7. Grantee will provide an annual consumer satisfaction survey report to DAS by March 15 each grant year or a mutually agreed upon date between DAS and the Grantee.
8. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by SF-HSA. The due dates for submitting the bi-annual summary reports are January 10<sup>th</sup> (July 1<sup>st</sup> through December 31<sup>st</sup> data) and July 10<sup>th</sup> (January 1<sup>st</sup> through June 30<sup>th</sup> data).
9. Grantee shall develop and deliver ad hoc reports as requested by SF-HSA and/or DAS.
10. For assistance with reporting requirements or submission of reports, contact:

Erica Maybaum  
Program Manager  
DAS, Office of Community Partnerships  
Erica.Maybaum@SFgov.org

Patrick Garcia  
Contract Manager  
HSA, Office of Contract Management  
Patrick.Garcia@SFgov.org

## **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 the [California Department of Aging \(CDA\) 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 V, VI, VII, VIII and IX.

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>Term</b>
<b>Little Brothers-Friends of 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: Volunteer Visitor 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>DAS Expenditures</b>					
Salaries & Benefits	\$73,286	\$73,286	\$73,286	\$73,286	\$293,144
Operating Expenses	\$2,069	\$2,069	\$2,069	\$2,069	\$8,276
<b>Subtotal</b>	\$75,355	\$75,355	\$75,355	\$75,355	\$301,420
Indirect Percentage (%)					
Indirect Cost					
Capital/Subcontractor Expenditures					
<b>Total DAS Expenditures</b>	\$75,355	\$75,355	\$75,355	\$75,355	\$301,420
<b>DAS Revenues</b>					
Funding	\$75,355	\$75,355	\$75,355	\$75,355	\$301,420
<b>Total DAS Revenue</b>	\$75,355	\$75,355	\$75,355	\$75,355	\$301,420
<b>Non DAS Revenues</b>					
<b>Total Non DAS Revenue</b>					
<b>TOTAL DAS AND NON DAS REVENUE</b>	\$75,355	\$75,355	\$75,355	\$75,355	\$301,420
Full Time Equivalent (FTE)	1.15	1.15	1.15	1.15	4.60
Prepared by:					Date:
HSA-CO Review Signature:					
HSA #1					

Program: Volunteer Visitor Program

Appendix B, Page 2

**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
Program Coordinator	\$64,315	0.80	100%	0.80	\$51,452	\$51,452	\$51,452	\$51,452	\$205,808
Volunteer Coordinator	\$65,165	0.25	100%	0.25	\$16,291	\$16,291	\$16,291	\$16,291	\$65,164
Assessment Coordinator	\$55,425	0.10	100%	0.10	\$5,543	\$5,543	\$5,543	\$5,543	\$22,172
<b>Totals</b>	<b>\$184,905</b>	<b>1.15</b>	<b>300%</b>	<b>1.15</b>	<b>\$73,286</b>	<b>\$73,286</b>	<b>\$73,286</b>	<b>\$73,286</b>	<b>\$293,144</b>
Fringe Benefits Rate									
Employee Fringe Benefits									
<b>Total DAS Salaries and Benefits</b>	<b>\$184,905</b>				<b>\$73,286</b>	<b>\$73,286</b>	<b>\$73,286</b>	<b>\$73,286</b>	<b>\$293,144</b>
<b>HSA #2</b>									

Program: Volunteer Visitor Program

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**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	\$500	\$500	\$500	\$500	\$2,000
Building Maintenance Supplies and Repair					
Printing and Reproduction	\$1,089	\$1,089	\$1,089	\$1,089	\$4,356
Insurance					
Staff Training					
Staff Travel	\$480	\$480	\$480	\$480	\$1,920
Rental of Equipment					
<u>Consultants</u>					
<u>Other</u>					
<b>Total DAS Operating Expenses</b>	<b>\$2,069</b>	<b>\$2,069</b>	<b>\$2,069</b>	<b>\$2,069</b>	<b>\$8,276</b>

**HSA #3**



**APPENDIX F - SITE CHART**

HSA /DAS

AGENCY: Little Brothers – Friends of the Elderly

TERM: July 1, 2023 – June 30, 2027

GRANT: Volunteer Visitor Program

DIRECTOR: Cathy Michalec

CA PHONE NUMBER: 415-771-7957

<b>SITES:</b>	Little Brothers – Friends of the Elderly				
<b>Name of Site</b>					
Address and Zip	909 Hyde St. San Francisco, CA 94109				
Phone Number	415-771-7957				
Neighborhood	Lower Nob Hill				
District	3				
Person in Charge	Cathy Michalec				
Site Manager	Cathy Michalec				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9am – 5pm				
Hours of <u>scheduled</u> programming	9am – 5pm				
Days closed	New's Day, President's Day, MLK, Memorial Day, Ceasar Chavez, Juneteenth, July 4th, Labor Day, Veteran's Day, Day after Thanksgiving				
ADA Accessible	<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	<input type="checkbox"/> Yes <input type="checkbox"/> No