



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

Department of Benefits
and Family Support

Department of Disability
and Aging Services

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DATE: MAY 8, 2024

SUBJECT: NEW GRANTS: **MULTIPLE GRANTEES (NON-PROFIT)** TO PROVIDE AGING AND DISABILITY RESOURCE CENTERS (see table on page 2)

DS
RD

GRANT TERM: 7/1/2024-6/30/2026

GRANT AMOUNT:	<u>New</u>	<u>Contingency</u>	<u>Total</u>
	\$3,220,061	\$322,006	\$3,542,067

ANNUAL AMOUNT	<u>FY 24/25</u>	<u>FY 25/26</u>
	\$1,586,237	\$1,633,824



London Breed
Mayor

Trent Rhorer
Executive Director

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$2,286,243	\$708,414	\$225,404	\$322,006	\$3,542,067
PERCENTAGE:	71%	22%	7%		100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into grants with multiple providers for the period of July 1, 2024 to June 30, 2026, in an amount of \$3,220,061, plus a 10% contingency for a total amount not to exceed \$3,542,067. The purpose of the grants is to provide aging and disability resource centers at locations throughout San Francisco. The funding amounts are detailed in the following table:

Grantee	FY24/25	FY25/26	Total	10% Contingency	Not to exceed
Bayview Senior Services	\$165,617	\$170,585	\$336,202	\$33,620	\$369,822
Golden Gate Senior Services	\$147,865	\$152,301	\$300,166	\$30,017	\$330,183
Institute on Aging	\$156,020	\$160,701	\$316,721	\$31,672	\$348,393
Mission Neighborhood Centers	\$293,272	\$302,070	\$595,342	\$59,534	\$654,876
On Lok Day Services	\$229,677	\$236,567	\$466,244	\$46,624	\$512,868
Openhouse	\$132,502	\$136,477	\$268,979	\$26,898	\$295,877
Sequoia Living	\$346,555	\$356,952	\$703,507	\$70,351	\$773,858
Toolworks, Inc.	\$114,729	\$118,171	\$232,900	\$23,290	\$256,190
Total	\$1,586,237	\$1,633,824	\$3,220,061	\$322,006	\$3,542,067

Background

The Aging and Disability Resource Center (ADRC) serves as a one-stop shop for information, referral, assistance, and translation services throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. Specifically, ADRCs around the City provide services that assist people to continue living independently in the community, connecting them with long-term services and supports. ADRCs are located throughout the City and each ADRC has trained staff and on-site supervisors.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts in San Francisco. Some districts have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. There are two citywide ADRCs, one specializing in serving the disability community and the other specializing in serving the LGBTQ+ community. Each ADRC must demonstrate the capability to serve older people, adults with disabilities, and caregivers in their supervisory district or citywide in their area of specialty.

Services to be Provided

Aging and Disability Resource Center (ADRC):

The ADRC provides one-stop shop access to information, referral, assistance, and translation services for older people, adults with disabilities, and caregivers at key neighborhood locations. ADRC staff work in multiple sites which are already hubs for older people and adults with disabilities accessing other services. The ADRC staff provide services a minimum of five days a week. An additional Citywide ADRC Coordinator meets with staff employed by ADRC sites on a weekly and monthly basis. This coordinator is responsible for providing training, clinical consultation, technical assistance, and executing an outreach plan for the ADRC sites. The Citywide ADRC Coordinator and on-site supervisor meet monthly to avoid any issues of dual consultation/support.

Grantee	District(s)	Unduplicated clients
Bayview Senior Services	D5, D10	1100
Golden Gate Senior Services	D1	1050
Mission Neighborhood Centers	D9	2275
On Lok Day Services	D8	1800
Openhouse	Citywide ¹	625
Sequoia Living	D2, D5	2000
Toolworks, Inc.	Citywide ²	600

¹Citywide ADRC focused on the LGBTQ+ community

²Citywide ADRC focused on the disability community

Citywide ADRC Coordinator:

The Citywide ADRC Coordinator contributes to the knowledge, helps develop skills, and consults on the performance of ADRC staff working with seniors and adults with disabilities. The coordinator works with ADRC staff on offering information and referral, assistance, and follow-up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff. The specifics of either consultation model are worked out with each specific agency. This flexibility allows for the service model to respond to the culture of each organization.

The Citywide ADRC Coordinator provides resources by bringing together ADRC staff from a variety of agencies for group and individual consultation meetings and administrative trainings. In general, the coordinator provides more focused and advanced trainings and consultation opportunities than can often be provided by most community organizations.

Grantee	
Institute on Aging	Citywide ADRC Coordinator

Selection

Grantees were selected through Request for Proposals 1105, which was competitively bid in March 2024.

Funding

Funding for these grants is provided through State, Federal, and County General Funds.

ATTACHMENTS

Bayview Senior Services

Appendix A: Services to be provided

Appendix B: Program budget

Golden Gate Senior Services

Appendix A: Services to be provided

Appendix B: Program budget

Institute on Aging

Appendix A: Services to be provided

Appendix B: Program budget

Mission Neighborhood Centers

Appendix A: Services to be provided

Appendix B: Program budget

On Lok

Appendix A: Services to be provided

Appendix B: Program budget

Openhouse

Appendix A: Services to be provided

Appendix B: Program budget

Sequoia Living

Appendix A: Services to be provided

Appendix B: Program budget

Toolworks, Inc.

Appendix A: Services to be provided

Appendix B: Program budget

APPENDIX A – SERVICES TO BE PROVIDED
BAYVIEW HUNTER’S POINT MULTIPURPOSE SENIOR SERVICES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2024 to June 30, 2026

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client’s needs will be met.
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, 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 their 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
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
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.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

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 needs:

- 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. Client Eligibility for ADRC Services

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

V. Location and Time of Services

Services will take place at the Bayview Hunter’s Point Multipurpose Senior Services sites detailed below:

District 5

Western Addition Senior Center
1390 ½ Turk St
San Francisco, CA 94115
Monday-Friday
9:00am-5:00pm

District 10

Dr. George Davis Senior Center
1753 Carroll Ave
San Francisco, CA 94124
Monday-Friday
9:00am-5:00pm

VI. Description of Services

Aging and Disability Resource Centers (ADRC) provide information and referral, assistance, follow-up, and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities, and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts throughout San Francisco, with a concentration in areas that have dense populations of high need and with an ability to serve younger adults with disabilities. There are also 2 Citywide ADRCs, one with a focus on providing services to the LGBTQ+ community and the other focused on services for the disability community. Bayview Hunter’s Point Multipurpose Senior Center will be required to serve older adults, adults with disabilities, and caregivers in District 5 and District 10.

Grantee shall provide the following services during the term of this grant:

1. Grantee will conduct client assessments to identify service needs to be addressed;
2. Grantee will provide Information and Referral of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home

care, legal, safety, recreation, senior centers, translation, mental health, disability resources, veterans services, vocational training, LGBTQ+ programs/services and transportation;

3. Grantee will provide assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
4. Grantee will provide follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider;
5. Grantee will conduct a minimum of 3 outreach events per quarter per 1.0 FTE. At least one of these quarterly events should be conducted at a community center or senior service provider at a location within the supervisorial district. At least one of these quarterly events must target the adult with disability population.
6. Grantee will demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs can be met by their services.
7. Grantee will designate at least one 1.0 FTE as the ADRC service provider.
8. Grantee will offer back-up staff who can offer services in case of any absence.
9. Grantee will develop a procedure for keeping abreast of relevant programs and resources for clients.
10. Grantee will develop and demonstrate targeted outreach to adults with disabilities.
11. Grantee will conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services.
12. Grantee will participate in weekly staff consultations with Citywide ADRC Coordinator.
13. Grantee will work with Citywide ADRC Coordinator in developing and scheduling outreach events.
14. Grantee will participate in monthly ADRC group meeting/training organized and hosted by Citywide ADRC Coordinator.
15. Grantee will attend quarterly meeting between on-site supervisor and ADRC Coordinator.
16. Grantee will collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
17. Grantee will develop partnerships with other organizations working within the district to ensure a robust network of service provision.
18. Grantee will administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.

19. Grantee will ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
20. Grantee will make all efforts to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26
Unduplicated Consumers	1100	1100
Units of Information and Referral	2000	2000
Units of Assistance	2300	2300
Units of Follow-up	1000	1000
Outreach Events	24	24
Percentage of unduplicated consumers who are disabled.	15%	15%

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

IX. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the

10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>

- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
E:mail address: sara.hofverberg@sfgov.org

Krystal Rogers, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: krystal.rogers@sfgov.org

X. Monitoring Activities

- A.** Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B.** Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Name	Term		
Bayview Hunters Point Multipurpose Senior Services	7/1/24 - 6/30/26		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
If modification, Effective Date of Mod. No. of Mod.			
Program: ADRC D10 & D5			
Budget Reference Page No.(s)			(Total)
Program Term	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/24 - 6/30/26
DAS Expenditures			
Salaries & Benefits	\$150,561	\$155,078	\$305,639
Operating Expenses			
Subtotal	\$150,561	\$155,078	\$305,639
Indirect Percentage (10%)	10.00%	10.00%	
Indirect Cost	\$15,056	\$15,507	\$30,563
Capital/Subcontractor Expenditures			
Total DAS Expenditures	\$165,617	\$170,585	\$336,202
Total DAS Revenue	\$165,617	\$170,585	\$336,202
Non DAS Revenues			
Total Non DAS Revenue			
TOTAL DAS AND NON DAS REVENUE	\$165,617	\$170,585	\$336,202
Full Time Equivalent (FTE)	2.00	2.00	8.00
Prepared by:	Date:		
HSA-CO Review Signature:			
HSA #1			

Salaries & Benefits Detail

(Total)

DAS Salaries & Benefits	Agency Totals		HSA Program		7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/24 - 6/30/26
Position Title	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
Intake/Resource Specialist BHP	\$53,560	75%	100%	0.75	\$40,170	\$41,375	\$81,545
Intake/Resource Specialist WA	\$55,702	100%	100%	1.00	\$55,702	\$57,373	\$113,075
Supervisor - Dir Social Services	\$87,016	25%	100%	0.25	\$21,754	\$22,407	\$44,161
Totals	\$196,278	2.00	300.00%	2.00	\$117,626	\$121,155	\$238,781
Fringe Benefits Rate	28.00%						
Employee Fringe Benefits	\$54,958				\$32,935	\$33,923	\$66,858
Total DAS Salaries and Benefits	\$251,236				\$150,561	\$155,078	\$305,639
HSA #2							

APPENDIX A-1 – SERVICES TO BE PROVIDED
GOLDEN GATE SENIOR SERVICES-RICHMOND SENIOR CENTER
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2024 to June 30, 2026

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
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, 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 their 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

Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
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.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

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 needs:

- 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. Client Eligibility for ADRC Services

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

V. Location and Time of Services

Services will take place at Richmond Senior Center, 6221 Geary Blvd, 3rd Floor, San Francisco, CA 94121. Hours of operation are from 9:00am-4:30pm, Monday to Friday.

VI. Description of Services

Aging and Disability Resource Centers (ADRC) provide information and referral, assistance, follow-up, and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities, and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts throughout San Francisco, with a concentration in areas that have dense populations of high need and with an ability to serve younger adults with disabilities. There are also 2 Citywide ADRCs, one with a focus on providing services to the LGBTQ+ community and the other focused on services for the disability community. Golden Gate Senior Services Richmond Senior Center will be required to serve older adults, adults with disabilities, and caregivers in District 1.

Grantee shall provide the following services during the term of this grant:

1. Grantee will conduct client assessments to identify service needs to be addressed;
2. Grantee will provide Information and Referral of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, veterans services, vocational training, LGBTQ+ programs/services and transportation;
3. Grantee will provide assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
4. Grantee will provide follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider;

5. Grantee will conduct a minimum of 3 outreach events per quarter per 1.0 FTE. At least one of these quarterly events should be conducted at a community center or senior service provider at a location within the supervisorial district. At least one of these quarterly events must target the adult with disability population.
6. Grantee will demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs can be met by their services.
7. Grantee will designate at least one 1.0 FTE as the ADRC service provider.
8. Grantee will offer back-up staff who can offer services in case of any absence.
9. Grantee will develop a procedure for keeping abreast of relevant programs and resources for clients.
10. Grantee will develop and demonstrate targeted outreach to adults with disabilities.
11. Grantee will conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services.
12. Grantee will participate in weekly staff consultations with Citywide ADRC Coordinator.
13. Grantee will work with Citywide ADRC Coordinator in developing and scheduling outreach events.
14. Grantee will participate in monthly ADRC group meeting/training organized and hosted by Citywide ADRC Coordinator.
15. Grantee will attend quarterly meeting between on-site supervisor and ADRC Coordinator.
16. Grantee will collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
17. Grantee will develop partnerships with other organizations working within the district to ensure a robust network of service provision.
18. Grantee will administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
19. Grantee will ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
20. Grantee will make all efforts to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26
Unduplicated Consumers	1050	1050
Units of Information and Referral	1200	1200
Units of Assistance	1600	1600
Units of Follow-up	400	400
Outreach Events	18	18
Percentage of unduplicated consumers who are disabled.	15%	15%

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

IX. Reporting Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg
Program Analyst
Department of Disability and Aging Services
Sara.Hofverberg@SFgov.org

Emmy Miller
Contract Manager
Human Services Agency
Emmy.Miller@SFgov.org

X. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee: Golden Gate Senior Services			7/1/24 - 6/30/26
Program: ADRC FY24-26			
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> Check One) <input type="checkbox"/>			
	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$124,363	\$127,369	\$251,732
Operating-Direct	\$4,215	\$5,067	\$9,282
Subtotal	\$128,578	\$132,436	\$261,014
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$19,287	\$19,865	\$39,152
Consultant/Subcontractor (\$25,000+)			
CODB Eligible Expenses	\$147,865	\$152,301	\$300,166
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$147,865	\$152,301	\$300,166
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$147,865	\$152,301	\$300,166
Grantee/Contractor Revenues			
Total Grantee/Contractor Revenues			
Total Revenues	\$147,865	\$152,301	\$300,166
Prepared by: Kaleda Walling 4.2024			
Telephone No. & Email:			HSA Budget Form (3/24)

Grantee: Golden Gate Senior Services											Appendix B, Page 2	
Program: ADRC FY24-26												
Salaries & Benefits Detail												
POSITION TITLE	Agency Totals		HSA Program		7/1/24 - 6/30/25	Agency Totals		HSA Program		7/1/25 - 6/30/26	7/1/24 - 6/30/26	
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total	
I&R Specialist Russian/English (Sam Bratt)	\$56,160	0.75	100%	0.75	\$42,120	\$57,845	0.75	100%	0.75	\$43,384	\$85,504	
I&R Specialist Cantonese/English (Tony Wong)	\$56,160	0.75	100%	0.75	\$42,120	\$57,845	0.75	100%	0.75	\$43,384	\$85,504	
Facilities Maintenance Tech (Tim Fong)	\$57,200	0.10	100%	0.10	\$5,899	\$57,200	0.10	100%	0.10	\$5,897	\$11,796	
Community Programs Director (Claribette Del Rosario)	\$81,963	0.10	100%	0.10	\$8,196	\$81,963	0.10	100%	0.10	\$8,196	\$16,392	
RSC Director (Kaleda Walling)	\$123,438	0.05	100%	0.05	\$6,172	\$123,438	0.05	100%	0.05	\$6,172	\$12,344	
				-					-			
				-					-			
				-					-			
				-					-			
				-					-			
TOTALS	\$374,921	1.75	5.00	1.75	\$104,507	\$378,291	1.75	5.00	1.75	\$107,033	\$211,540	
FRINGE BENEFIT RATE	19%					19%						
EMPLOYEE FRINGE BENEFITS					\$19,856					\$20,336	\$40,192	
TOTAL SALARIES & BENEFITS					\$124,363					\$127,369	\$251,732	

HSA Budget Form (3/24)

Grantee: Golden Gate Senior Services
Program: ADRC FY24-26

Appendix B, Page 3

Operating Expenses Detail

	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/24 - 6/30/26
	Original	Original	Total
<u>Expenditure Category</u>			
Rental of Property	\$2,724	\$2,724	\$5,448
Utilities(Elec, Water, Gas, Phone, Garbage)	\$900	\$900	\$1,800
Office Supplies, Postage	\$236	\$500	\$736
Building Maintenance Supplies and Repair		\$343	\$343
Printing and Reproduction			
Insurance			
Staff Training			
Staff Travel-(Local & Out of Town)	\$55	\$100	\$155
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
Consultant A			
Subcontractor A			
<u>Other</u>			
IT Web Support	\$300	\$500	\$800
Other B			
<u>Total Operating Expense</u>	\$4,215	\$5,067	\$9,282

HSA Budget Form (3/24)

**APPENDIX A–SERVICES TO BE PROVIDED
INSTITUTE ON AGING (IOA)
CITYWIDE AGING AND DISABILITY RESOURCE CENTER (ADRC) COORDINATOR**

July 1, 2024 to June 30, 2026

I. Purpose of Grant

The Grantee will provide training and administrative consultation and support to ADRC staff, as well as coordinating and executing an ADRC outreach plan.

II. Definitions

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
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, 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 their 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

Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
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.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

III. Target Population

The intended recipients of the services provided by the Citywide ADRC Coordinator are DAS funded community ADRC staff working with older adults and adults with disabilities.

The ADRC 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 needs:

- 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 ADRC Coordinator Services

DAS funded ADRC staff working with older adults and adults with disabilities.

DAS client eligibility for ADRC services include:

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

V. Location and Time of Services

Group consultation, individual consultation, and didactic trainings will be delivered at each ADRC site, virtually, the Institute on Aging, and when applicable, other service provider locations in the community. Exact schedule and location will be determined in conjunction with the ADRC staff and their on-site supervisors.

The Citywide ADRC Coordinator will work with ADRC staff on offering information and referral, assistance, and follow up services in accordance with statewide and national standards. The Citywide ADRC Coordinator is available to meet in a large group format and on an individual basis with ADRC staff. The specifics of either consultation mode will be worked out with each specific agency. This flexibility allows for the service model to respond to the culture of each organization.

IV. Description of Services

The ADRC is a “no wrong door” model for consumers to access long term care services and supports. It is achieved through a partnership between DAS, the Citywide ADRC Coordinator and the ADRCs throughout San Francisco. The Citywide ADRC Coordinator assists with this by providing: individual and group administrative support, didactic and administrative training, chart and documentation review, and opportunities for professional networking/resource sharing.

The Citywide ADRC Coordinator shall be responsible for arranging for and identifying necessary outreach efforts to promote ADRCs in neighborhoods throughout the City, advertising information and referral services in coordination with ADRC staff.

The Citywide ADRC Coordinator shall monitor the effectiveness of services at each outstation (e.g., conducting timely follow up activities, appropriateness of referrals, adequate service levels), providing feedback to the DAS contract monitor as needed.

Grantee shall provide the following services during the term of this grant:

1. Grantee will coordinate and provide monthly group meetings for all ADRC staff. Group meetings provide case consultation, topic specific training, and review of core tasks and standards of information and referral, and assistance concepts. The goal of these meetings is to improve the ADRC staff's general performance as well as their ability to work with clients (e.g., recognizing case management and other social service needs of clients and the need for follow-up with clients). For group consultation, the Citywide ADRC Coordinator will also bring in outside experts and trainers to expand knowledge of resources, geriatric and disability related topics, and improve skills in assessments, effective follow-up, and managing challenging client issues. An added benefit of the group consultation context is the camaraderie that develops between participants encouraging resource sharing, cross agency referrals, and peer review and guidance.
2. Grantee will ensure that a minimum of 6 of the ADRC staff group meetings include training or information services around working with people with disabilities and disability services available.
3. Grantee will deliver weekly administrative consultation to the staff at each ADRC site. Individual consultation sessions emphasize specific ADRC staff performance issues, challenging client issues and offer guidance for maintaining quality information and referral services. In addition, individual consultation provides a forum to address and improve charting and documentation issues.
4. Grantee will meet with ADRC site supervisors on a quarterly basis to ensure coordination between the Citywide ADRC Coordinator and the day to day ADRC site supervisors in order to make programs more effective and avoid any problems of "dual support."
5. Grantee will develop and maintain outreach plan and materials for ADRC staff collaboration. The plan will identify targets for increased utilization of ADRC services in historically underserved neighborhoods. The plan will, at a minimum, develop and identify outreach events in conjunction with other ADRC partners, updating outreach events monthly.
6. Grantee will create and maintain an ADRC Outreach Calendar, updating it monthly with the outreach events completed by each ADRC site.
7. Grantee will arrange for the execution of outreach events, providing outreach through presentations and fairs, and partnering with ADRC staff and/or DAS to staff events.
8. Grantee will collaborate with DAS analyst and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria. This includes attending the quarterly ADRC Advisory Council meeting and the quarterly ADRC supervisors meeting.
9. Grantee will develop partnerships with other community organizations and service providers across the City to ensure a robust network of service provision.
10. Grantee will designate at least one 1.0 FTE as the Citywide ADRC Coordinator and provide back-up staff in case of any absence.
11. Grantee will ensure that the Citywide ADRC Coordinator has the technology and systems available to meet the needs of training, consulting and coordinating the ADRC staff.

V. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

1. Provide **weekly staff consultations** to all ADRC sites for at least 46 weeks of the fiscal year.
2. Coordinate and host **monthly ADRC staff group meetings**.
3. Ensure that a minimum of half of the **monthly ADRC staff group meetings** are **focused on the Disability community** and include training or information services around working with people with disabilities and disability services available.
4. Provide **quarterly individual meetings with each ADRC site supervisor**.
5. Coordinate at least one **outreach event** per month with a **focus on reaching the Disability Community**.
6. Create the **ADRC Outreach Calendar** and update it monthly with the outreach events completed by each ADRC site.

	FY 24/25	FY 24/25
Weekly Staff Consultations	644	644
Monthly ADRC Staff Group Meetings	12	12
Monthly ADRC Staff Group Meetings focused on the Disability Community	6	6
Occurrence rate of Quarterly Meetings with ADRC on-site supervisors	90%	90%
Monthly Outreach Events focused on reaching the Disability Community.	14	14
ADRC Outreach Calendar	1	1

VI. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using ADRC staff surveys created, distributed, collected, and recorded by DAS analyst with a sample size of at least 90% of ADRC staff.

- ADRC staff receive monthly trainings that address their needs. Target: 95%
- ADRC staff receive weekly consultations that address their needs. Target: 95%
- ADRC staff increase knowledge or skills to assist clients with their specific needs around disability. Target: 95%

VII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated client count and information and referral, assistance and follow-up service units.
- B. Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.

- E. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- F. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Office of Community Partnerships
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
Email address: sara.hofverberg@sfgov.org

Tara Alvarez, Senior Contract Manager
Office of Contract Management
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: tara.alvarez@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee/Contractor: Institute on Aging			7/1/24 - 6/30/26
Program: Citywide ADRC Coordinator			
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (Check One)			
	FY24/25	FY25/26	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$ 114,689	\$ 114,689	\$ 229,378
Operating-Direct	\$ 20,981	\$ 25,051	\$ 46,032
Subtotal	\$ 135,670	\$ 139,740	\$ 275,410
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$ 20,350	\$ 20,961	\$ 41,311
CODB Eligible Expenses	\$ 156,020	\$ 160,701	\$ 316,721
Total Expenses	\$ 156,020	\$ 160,701	\$ 316,721
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$ 156,020	\$ 160,701	\$ 316,721
Grantee/Contractor Revenues			
			\$ -
			\$ -
			\$ -
			\$ -
Total Grantee/Contractor Revenues	\$ -	\$ -	\$ -
Total Revenues	\$ 156,020	\$ 160,701	\$ 316,721
Prepared by: Jade Luo			
Telephone No. & Email: 415.750.4151, jluo@ioaging.org			<i>HSA Budget Form (3/24)</i>

Grantee/Contractor: Institute on Aging
 Program: Citywide ADRC Coordinator

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		FY24/25	FY25/26	7/1/24 - 6/30/26
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Original	Total
<i>ADRC Coordinator</i>	\$86,511	1.00	100%	1.00	\$86,511	\$86,511	\$173,022
<i>Lead Supervisor Consultive Serv</i>	\$104,793	0.05	100%	0.05	\$5,240	\$5,240	\$10,480
				-			
				-			
				-			
				-			
				-			
				-			
				-			
TOTALS	\$191,304	1.05	2.00	1.05	\$91,751	\$91,751	\$183,502
FRINGE BENEFIT RATE	25%						
EMPLOYEE FRINGE BENEFITS					\$22,938	\$22,938	\$45,876
TOTAL SALARIES & BENEFITS					\$114,689	\$114,689	\$229,378

HSA Budget Form (3/24)

Grantee/Contractor: Institute on Aging
Program: Citywide ADRC Coordinato

Appendix B, Page 3

Operating Expenses Detail

	FY24/25 Original	FY25/26 Original	7/1/24 - 6/30/26 Total
<u>Expenditure Category</u>			
Rental of Property	\$4,500	\$4,500	\$9,000
Utilities(Elec, Water, Gas, Phone, Garbage)	\$2,040	\$2,040	\$4,080
Office Supplies, Postage	\$1,589	\$1,095	\$2,684
Building Maintenance Supplies and Repair			
Printing and Reproduction			
Insurance	\$600	\$600	\$1,200
Licenses and Fees	\$1,400	\$1,400	\$2,800
Staff Training	\$1,500	\$1,500	\$3,000
Staff Travel-(Local & Out of Town)	\$1,688	\$1,688	\$3,376
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
<u>Other</u>			
Outreach Support	\$5,450	\$5,450	\$10,900
Technology		\$4,564	\$4,564
Telephone	\$1,000	\$1,000	\$2,000
Meeting Expense	\$1,214	\$1,214	\$2,428
<u>Total Operating Expense</u>	\$20,981	\$25,051	\$46,032

HSA Budget Form (3/24)

APPENDIX A – SERVICES TO BE PROVIDED
MISSION NEIGHBORHOOD CENTERS, INC
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2024 to June 30, 2026

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
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, 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 their 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

Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
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.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

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 needs:

- 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. Client Eligibility for ADRC Services

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

V. Location and Time of Services

Services will take place at the Mission Neighborhood Centers Healthy Aging and Disability Services, 362 Capp St, San Francisco, CA 94110. Hours of operation are from 9:00am-5:00pm, Monday to Saturday.

VI. Description of Services

Aging and Disability Resource Centers (ADRC) provide information and referral, assistance, follow-up, and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities, and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts throughout San Francisco, with a concentration in areas that have dense populations of high need and with an ability to serve younger adults with disabilities. There are also 2 Citywide ADRCs, one with a focus on providing services to the LGBTQ+ community and the other focused on services for the disability community. Mission Neighborhood Centers will be required to serve older adults, adults with disabilities, and caregivers in District 9.

Grantee shall provide the following services during the term of this grant:

1. Grantee will conduct client assessments to identify service needs to be addressed;
2. Grantee will provide Information and Referral of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, veterans services, vocational training, LGBTQ+ programs/services and transportation;
3. Grantee will provide assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
4. Grantee will provide follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider;

5. Grantee will conduct a minimum of 3 outreach events per quarter per 1.0 FTE. At least one of these quarterly events should be conducted at a community center or senior service provider at a location within the supervisorial district. At least one of these quarterly events must target the adult with disability population.
6. Grantee will demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs can be met by their services.
7. Grantee will designate at least one 1.0 FTE as the ADRC service provider.
8. Grantee will offer back-up staff who can offer services in case of any absence.
9. Grantee will develop a procedure for keeping abreast of relevant programs and resources for clients.
10. Grantee will develop and demonstrate targeted outreach to adults with disabilities.
11. Grantee will conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services.
12. Grantee will participate in weekly staff consultations with Citywide ADRC Coordinator.
13. Grantee will work with Citywide ADRC Coordinator in developing and scheduling outreach events.
14. Grantee will participate in monthly ADRC group meeting/training organized and hosted by Citywide ADRC Coordinator.
15. Grantee will attend quarterly meeting between on-site supervisor and ADRC Coordinator.
16. Grantee will collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
17. Grantee will develop partnerships with other organizations working within the district to ensure a robust network of service provision.
18. Grantee will administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
19. Grantee will ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
20. Grantee will make all efforts to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26
Unduplicated Consumers	2,275	2,275
Units of Information and Referral	2800	2800
Units of Assistance	3500	3500
Units of Follow-up	1400	1400
Outreach Events	42	42
Percentage of unduplicated consumers who are disabled.	15%	15%

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

IX. Reporting Requirements

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

- A.** Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B.** Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg
Program Analyst
Department of Disability and Aging Services
Sara.Hofverberg@SFgov.org

Tara Alvarez
Contract Manager
Human Services Agency
Tara.Alvarez@SFgov.org

X. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Grantee/Contractor: Mission Neighborhood Centers			7/1/24 - 6/30/26
Program: ADRC			
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> (Check One)			
	FY 1	FY 2	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$ 238,657	\$ 245,818	\$ 484,475
Operating-Direct	\$ 16,362	\$ 16,852	\$ 33,214
Subtotal	\$ 255,019	\$ 262,670	\$ 517,689
Indirect Percentage (%)	15%	15%	15%
Indirect Costs (Line 16 X Line 15)	\$ 38,253	\$ 39,401	\$ 77,654
Consultant/Subcontractor (\$25,000+)	\$ -	\$ -	\$ -
CODB Eligible Expenses	\$ 293,272	\$ 302,070	\$ 595,342
Direct Client Pass-Through	\$ -	\$ -	\$ -
Capital Expenses	\$ -	\$ -	\$ -
Total Expenses	\$ 293,272	\$ 302,070	\$ 595,342
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$ 293,272	\$ 302,070	\$ 595,342
Grantee/Contractor Revenues			
			\$ -
			\$ -
			\$ -
			\$ -
Total Grantee/Contractor Revenues	\$ -	\$ -	\$ -
Total Revenues	\$ 293,272	\$ 302,070	\$ 595,342
Prepared by: Aurora Alvarado			
<i>Telephone No. & Email: 415-206-7752, aurora.alvarado@mncsf.org</i>			<i>HSA Budget Form (3/24)</i>

Grantee/Contractor: Mission Neighborhood Center
 Program: ADR

Appendix B, Page 2

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		FY 1	FY 2	7/1/24 - 6/30/26
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Original	Total
I & A Specialist (English/Spanish)	\$56,160	1.00	100%	1.00	\$56,160	\$57,845	\$114,005
I & A Specialist (English/Chinese)	\$56,160	1.00	100%	1.00	\$56,160	\$57,845	\$114,005
I & A Specialist (English/Russian)	\$58,240	1.00	100%	1.00	\$58,240	\$59,987	\$118,227
Community Resources Specialist	\$58,240	1.00	6%	1.00	\$3,494	\$3,599	
Program Director	\$136,032	1.00	2%	0.02	\$2,040	\$2,102	\$4,142
Center Manager	\$83,200	1.00	9%	0.09	\$7,488	\$7,713	\$15,201
				-			
				-			
				-			
				-			
				-			
TOTALS	\$448,032	6.00	3.17	4.11	\$183,582	\$189,091	\$365,580
FRINGE BENEFIT RATE	30%						
EMPLOYEE FRINGE BENEFITS					\$55,075	\$56,727	\$111,802
TOTAL SALARIES & BENEFITS					\$238,657	\$245,818	\$477,382

HSA Budget Form (3/24)

Grantee/Contractor: Mission Neighborhood Center
Program: ADR

Appendix B, Page 3

Operating Expenses Detail

Expenditure Category

	FY 1 Original	FY 2 Original	7/1/24 - 6/30/26 Total
Rental of Property			
Utilities(Elec, Water, Gas, Phone, Garbage)	\$4,166	\$ 4,290	\$8,456
Office Supplies, Postage	\$2,400	\$ 2,870	\$5,656
Building Maintenance Supplies and Repair	\$1,500	\$ 1,700	\$3,370
Printing and Reproduction	\$1,800	\$ 2,000	\$4,060
Insurance	\$1,250	\$ 1,288	\$2,538
Staff Training	\$1,000	\$ 600	\$1,220
Staff Travel-(Local & Out of Town)	\$1,200	\$ 1,200	\$4,060
Rental of Equipment			

Consultant/Subcontractor (\$25,000 & Under)

Other

Program Supplies	\$1,000	\$1,000	\$4,060
Food Supplies	\$900	\$905	\$2,132
Equipment	\$1,146	\$1,000	\$2,258

Total Operating Expense

	\$16,362	\$16,852	\$37,808
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HSA Budget Form (3/24)

**APPENDIX A – SERVICES TO BE PROVIDED
ON LOK DAY SERVICES 30TH STREET SENIOR CENTER
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2024 to June 30, 2026**

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
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, 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 their 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

Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
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.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

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 needs:

- 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. Client Eligibility for ADRC Services

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

V. Location and Time of Services

Services will take place at the 30th Street Senior Center, 225 30th Street, San Francisco, CA 94131. Hours of operation are from 8:30am-5:00pm, Monday to Saturday.

VI. Description of Services

Aging and Disability Resource Centers (ADRC) provide information and referral, assistance, follow-up, and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities, and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts throughout San Francisco, with a concentration in areas that have dense populations of high need and with an ability to serve younger adults with disabilities. There are also 2 Citywide ADRCs, one with a focus on providing services to the LGBTQ+ community and the other focused on services for the disability community. On Lok Day Services 30th Street Senior Center will be required to serve older adults, adults with disabilities, and caregivers in District 8.

Grantee shall provide the following services during the term of this grant:

1. Grantee will conduct client assessments to identify service needs to be addressed;
2. Grantee will provide Information and Referral of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, veterans services, vocational training, LGBTQ+ programs/services and transportation;
3. Grantee will provide assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
4. Grantee will provide follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider;

5. Grantee will conduct a minimum of 3 outreach events per quarter per 1.0 FTE. At least one of these quarterly events should be conducted at a community center or senior service provider at a location within the supervisorial district. At least one of these quarterly events must target the adult with disability population.
6. Grantee will demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs can be met by their services.
7. Grantee will designate at least one 1.0 FTE as the ADRC service provider.
8. Grantee will offer back-up staff who can offer services in case of any absence.
9. Grantee will develop a procedure for keeping abreast of relevant programs and resources for clients.
10. Grantee will develop and demonstrate targeted outreach to adults with disabilities.
11. Grantee will conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services.
12. Grantee will participate in weekly staff consultations with Citywide ADRC Coordinator.
13. Grantee will work with Citywide ADRC Coordinator in developing and scheduling outreach events.
14. Grantee will participate in monthly ADRC group meeting/training organized and hosted by Citywide ADRC Coordinator.
15. Grantee will attend quarterly meeting between on-site supervisor and ADRC Coordinator.
16. Grantee will collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
17. Grantee will develop partnerships with other organizations working within the district to ensure a robust network of service provision.
18. Grantee will administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
19. Grantee will ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
20. Grantee will make all efforts to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26
Unduplicated Consumers	1800	1800
Units of Information and Referral	3000	3000
Units of Assistance	3055	3055
Units of Follow-up	1500	1500
Outreach Events	18	18
Percentage of unduplicated consumers who are disabled.	15%	15%

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

IX. Reporting Requirements

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

- A.** Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B.** Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg
 Program Analyst
 Department of Disability and Aging Services
 Sara.Hofverberg@SFgov.org

Jason Chommanard
 Contract Manager
 Human Services Agency
 Jason.Chommanard@sfgov.org

X. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Name	Term		
On Lok Day Services	7/1/2024-6/30/2026		
(Check One) New <input checked="" type="checkbox"/> Renewal _____ Modification _____			
If modification, Effective Date of Mod. No. of Mod.			
Program: ADRC			
Budget Reference Page No.(s)			7/1/2024-6/30/2026
Program Term	7/1/24-6/30/25	7/1/25-6/30/26	Total
Expenditures			
Salaries & Benefits	\$178,659	\$184,018	\$362,677
Operating Expenses	\$21,060	\$21,692	\$42,752
Subtotal	\$199,719	\$205,710	\$405,429
Indirect Percentage (%)	15%	15%	
Indirect Cost (Line 16 X Line 15)	\$29,958	\$30,857	\$60,815
Subcontractor/Capital Expenditures	\$0	\$0	\$0
Total Expenditures	\$229,677	\$236,567	\$466,244
HSA Revenues			
TOTAL HSA REVENUES	\$229,677	\$236,567	\$466,244
Other Revenues			
Agency Cash - Fundraising	\$85,989	\$90,367	\$176,356
Total Revenues	\$315,666	\$326,934	\$642,600
Full Time Equivalent (FTE)	3.25	3.25	
Prepared by:	Meko Ma	Telephone No.:	628-208-8546
HSA-CO Review Signature:	_____		
HSA #1			12/2/2020

On Lok Day Services
Program: ADRC

Operating Expense Detail

<u>Expenditure Category</u>	TERM	TOTAL		
		<u>7/1/24-6/30/25</u>	<u>7/1/25-6/30/26</u>	<u>7/1/2024-6/30/2025</u>
Rental of Property				\$ -
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,600	\$1,648	\$ 3,248
Office Supplies, Postage		\$1,000	\$1,030	\$ 2,030
Building Maintenance Supplies and Repair		\$3,500	\$3,605	\$ 7,105
Printing and Reproduction		\$900	\$927	\$ 1,827
Insurance		\$1,200	\$1,236	\$ 2,436
Staff Training		\$500	\$515	\$ 1,015
Staff Travel-(Local & Out of Town)		\$4,500	\$4,635	\$ 9,135
Rental of Equipment		\$800	\$824	\$ 1,624
CONSULTANTS				\$ -
OTHER				
Data Plan		\$2,000	\$2,060	\$ 4,060
Outreach Supplies		\$5,060	\$5,212	\$ 10,272
				\$ -
TOTAL OPERATING EXPENSE		\$ 21,060	\$ 21,692	\$ 42,752
HSA #3				12/2/2020

**APPENDIX A – SERVICES TO BE PROVIDED
OPENHOUSE
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2024 to June 30, 2026**

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
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, 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 their 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

Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
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.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

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 needs:

- 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. Client Eligibility for ADRC Services

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

V. Location and Time of Services

Services will take place at Openhouse, 65 Laguna St, San Francisco, CA 94102. Hours of operation are from 9:30am-5:00pm, Monday to Friday, and 10:00am-4:00pm on Saturday.

VI. Description of Services

Aging and Disability Resource Centers (ADRC) provide information and referral, assistance, follow-up, and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities, and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts throughout San Francisco, with a concentration in areas that have dense populations of high need and with an ability to serve younger adults with disabilities. There are also 2 Citywide ADRCs, one with a focus on providing services to the LGBTQ+ community and the other focused on services for the disability community. Openhouse will be required to serve older adults, adults with disabilities, and caregivers as the Citywide ADRC focused on LGBTQ+ community.

Grantee shall provide the following services during the term of this grant:

1. Grantee will conduct client assessments to identify service needs to be addressed;
2. Grantee will provide Information and Referral of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, veterans services, vocational training, LGBTQ+ programs/services and transportation;
3. Grantee will provide assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
4. Grantee will provide follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider;

5. Grantee will conduct a minimum of 3 outreach events per quarter per 1.0 FTE. At least one of these quarterly events should be conducted at a community center or senior service provider at a location within the supervisorial district. At least one of these quarterly events must target the adult with disability population.
6. Grantee will demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs can be met by their services.
7. Grantee will designate at least one 1.0 FTE as the ADRC service provider.
8. Grantee will offer back-up staff who can offer services in case of any absence.
9. Grantee will develop a procedure for keeping abreast of relevant programs and resources for clients.
10. Grantee will develop and demonstrate targeted outreach to adults with disabilities.
11. Grantee will conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services.
12. Grantee will participate in weekly staff consultations with Citywide ADRC Coordinator.
13. Grantee will work with Citywide ADRC Coordinator in developing and scheduling outreach events.
14. Grantee will participate in monthly ADRC group meeting/training organized and hosted by Citywide ADRC Coordinator.
15. Grantee will attend quarterly meeting between on-site supervisor and ADRC Coordinator.
16. Grantee will collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
17. Grantee will develop partnerships with other organizations working within the district to ensure a robust network of service provision.
18. Grantee will administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
19. Grantee will ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
20. Grantee will make all efforts to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26
Unduplicated Consumers	625	625
Units of Information and Referral	950	950
Units of Assistance	850	850
Units of Follow-up	300	300
Outreach Events	12	12
Percentage of unduplicated consumers who are disabled.	15%	15%

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

IX. Reporting Requirements

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

- A.** Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B.** Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg
 Program Analyst
 Department of Disability and Aging Services
 Sara.Hofverberg@SFgov.org

Jason Chommanard
 Contract Manager
 Human Services Agency
 Jason.Chommanard@sfgov.org

X. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Name	Term		
Openhouse	7/1/24-6/30/26		
(Check One) New <input checked="" type="checkbox"/> Renewal _____ Modification _____			
If modification, Effective Date of Mod.		No. of Mod.	
Program: ADRC			
Budget Reference Page No.(s)			TOTAL
Program Term	7/1/24-6/30/25	7/1/25-6/30/26	7/1/24-6/30/26
Expenditures			
Salaries & Benefits	\$115,219	\$118,676	\$233,895
Operating Expenses	\$0	\$0	\$0
Subtotal	\$115,219	\$118,676	\$233,895
Indirect Percentage (%)	15%	15%	
Indirect Cost (Line 16 X Line 15)	\$17,283	\$17,801	\$35,084
Subcontractor/Capital Expenditures	\$0	\$0	\$0
Total Expenditures	\$132,502	\$136,477	\$268,979
HSA Revenues			
TOTAL HSA REVENUES	\$132,502	\$136,477	\$268,979
Other Revenues			
Total Revenues	\$132,502	\$136,477	\$268,979
Full Time Equivalent (FTE)			
Prepared by: Matthew Cimino		Telephone No.: 415-530-2783	
HSA-CO Review Signature: _____			
HSA #1			6/20/2018

**Openhouse
Program: ADRC**

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		7/1/24-6/30/25	7/1/25-6/30/26	7/1/24-6/30/26
	Annual Full TimeSalary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAAS	DAAS	TOTAL
					Budgeted Salary	Budgeted Salary	Budgeted Salary
Resource and Housing Navigator-I	\$60,000	0.50	100%	0.50	\$30,000	\$30,900	\$60,900
Housing Navigator-I	\$64,674	1.00	20%	0.20	\$12,935	\$14,000	\$26,935
Resource and Housing Supervisor	\$69,430	1.00	50%	0.50	\$34,606	\$35,300	\$69,906
Manager of CSS	\$82,500	1.00	10%	0.10	\$8,250	\$8,347	\$16,597
Director of CSS	\$102,250	1.00	10%	0.10	\$10,225	\$10,350	\$20,575
							\$0
							\$0
							\$0
							\$0
							\$0
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							\$0
							\$0
							\$0
							\$0
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							\$0
TOTALS	\$ 378,854	4.50	190%	1.40	\$96,016	\$98,897	\$194,913
FRINGE BENEFIT RATE	20%						
EMPLOYEE FRINGE BENEFITS	\$75,771				\$19,203	\$19,779	\$38,983
TOTAL SALARIES & BENEFITS	\$454,625				\$115,219	\$118,676	\$233,895
HSA #2							6/20/2018

**APPENDIX A – SERVICES TO BE PROVIDED
SEQUOIA LIVING
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2024 to June 30, 2026**

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
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, 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 their 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

Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
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.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

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 needs:

- 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. Client Eligibility for ADRC Services

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

V. Location and Time of Services

Services will take place at the Sequoia Living locations detailed below:

District 2
Aquatic Park Senior Center
890 Beach Street
San Francisco, CA 94109
Monday-Friday
9:30am-3:30pm

District 5
Downtown Senior Center
481 O'Farrell Street
San Francisco, CA 94102
Monday-Friday
9:30am-3:30pm

VI. Description of Services

Aging and Disability Resource Centers (ADRC) provide information and referral, assistance, follow-up, and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities, and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts throughout San Francisco, with a concentration in areas that have dense populations of high need and with an ability to serve younger adults with disabilities. There are also 2 Citywide ADRCs, one with a focus on providing services to the LGBTQ+ community and the other focused on services for the disability community. Sequoia Living will be required to serve older adults, adults with disabilities, and caregivers in District 2 and District 5.

Grantee shall provide the following services during the term of this grant:

1. Grantee will conduct client assessments to identify service needs to be addressed;
2. Grantee will provide Information and Referral of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, veterans services, vocational training, LGBTQ+ programs/services and transportation;

3. Grantee will provide assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
4. Grantee will provide follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider;
5. Grantee will conduct a minimum of 3 outreach events per quarter per 1.0 FTE. At least one of these quarterly events should be conducted at a community center or senior service provider at a location within the supervisorial district. At least one of these quarterly events must target the adult with disability population.
6. Grantee will demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs can be met by their services.
7. Grantee will designate at least one 1.0 FTE as the ADRC service provider.
8. Grantee will offer back-up staff who can offer services in case of any absence.
9. Grantee will develop a procedure for keeping abreast of relevant programs and resources for clients.
10. Grantee will develop and demonstrate targeted outreach to adults with disabilities.
11. Grantee will conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services.
12. Grantee will participate in weekly staff consultations with Citywide ADRC Coordinator.
13. Grantee will work with Citywide ADRC Coordinator in developing and scheduling outreach events.
14. Grantee will participate in monthly ADRC group meeting/training organized and hosted by Citywide ADRC Coordinator.
15. Grantee will attend quarterly meeting between on-site supervisor and ADRC Coordinator.
16. Grantee will collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
17. Grantee will develop partnerships with other organizations working within the district to ensure a robust network of service provision.
18. Grantee will administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
19. Grantee will ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.

20. Grantee will make all efforts to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26
Unduplicated Consumers	2000	2000
Units of Information and Referral	2400	2400
Units of Assistance	3200	3200
Units of Follow-up	1200	1200
Outreach Events	48	48
Percentage of unduplicated consumers who are disabled.	15%	15%

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

IX. Reporting Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg
Program Analyst
Department of Disability and Aging Services
Sara.Hofverberg@SFgov.org

Jason Chommanard
Contract Manager
Human Services Agency
Jason.Chommanard@sfgov.org

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM

Name	Term		
Sequoia Living	7/1/2024-6/30/2026		
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
If modification, Effective Date of Mod.		No. of Mod.	
Program: ADRC			
Budget Reference Page No.(s)			7/1/2024-6/30/2026
Program Term	7/1/24-6/30/25	7/1/25-6/30/26	Total
Expenditures			
Salaries & Benefits	\$296,714	\$308,582	\$605,296
Operating Expenses	\$4,638	\$1,811	\$6,449
Subtotal	\$301,352	\$310,393	\$611,745
Indirect Percentage (%)	15%	15%	
Indirect Cost (Line 16 X Line 15)	\$45,203	\$46,559	\$91,762
Subcontractor/Capital Expenditures	\$0	\$0	\$0
Total Expenditures	\$346,555	\$356,952	\$703,507
HSA Revenues			
TOTAL HSA REVENUES	\$346,555	\$356,952	\$703,507
Other Revenues			
Total Revenues	\$346,555	\$356,952	\$703,507
Full Time Equivalent (FTE)			
Prepared by: Susan Dichter	Telephone No.: 415.474.0334		
HSA-CO Review Signature:	_____		
HSA #1	12/2/2020		

**Sequoia Living
Program: ADRC**

Operating Expense Detail

<u>Expenditure Category</u>	TERM	TOTAL		
		<u>7/1/24-6/30/25</u>	<u>7/1/25-6/30/26</u>	<u>7/1/2024-6/30/202</u>
Rental of Property		\$138	\$138	\$ 276
Utilities(Elec, Water, Gas, Phone, Garbage)		\$2,500	\$573	\$ 3,073
Office Supplies, Postage				\$ -
Building Maintenance Supplies and Repair		\$1,500	\$600	\$ 2,100
Printing and Reproduction				\$ -
Insurance				\$ -
Staff Training		\$500	\$500	\$ 1,000
Staff Travel-(Local & Out of Town)				\$ -
Rental of Equipment				\$ -
CONSULTANTS				\$ -
OTHER				\$ -
TOTAL OPERATING EXPENSE		\$ 4,638	\$ 1,811	\$ 6,449
HSA #3				12/2/2020

**APPENDIX A – SERVICES TO BE PROVIDED
TOOLWORKS
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
July 1, 2024 to June 30, 2026**

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

ADRC	Aging and Disability Resource Centers (ADRCs) serve as single points of entry into the long-term services and supports (LTSS) system for older adults, people with disabilities, caregivers, veterans and families. ADRCs specialize in information and referral, assistance with connecting to services and benefits, and translation needs. To fulfill these functions, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
Assistance	Support of an individual to secure the services required to meet his or her needs. Assistance may include, translation, contacting agencies on behalf of the client, filling out forms, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.
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, 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 their 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

Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
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.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.
HSA	San Francisco Human Services Agency
Information and Referral	To link individuals with current information, opportunities and services available within their communities. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, LGBT programs/services and transportation.
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 sex assigned at birth. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-speaking proficiency	Any person who does not speak English well, or is otherwise unable to communicate effectively in English because English is not the person's primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Outreach Event	An activity conducted by an ADRC staff member that will create an opportunity to provide information about ADRC services, programs and services to older adults, adults with disabilities, and caregivers who might not otherwise be aware or have access to the information. Examples include, but are not limited to, tabling at a special event or farmer's market, presenting information to a class or program at a senior center, providing information and flyers to staff and residents at a housing site.
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.
Socially Isolated	Having few social relationships and few people to interact with regularly.
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).
Senior/Older Adult	Person who is 60 years of age or older
Translation Service	A type of service within ADRC programming. Service units are captured by the number of hours of translation assistance provided to clients that cannot speak/read English. In addition, Translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.
Unduplicated Client (UDC)	A client served in the grantee's ADRC program and reflected in a DAS provided database.
Veteran	A person who served in any branch of the United States military.

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 needs:

- 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. Client Eligibility for ADRC Services

- Resident of San Francisco and
- Person aged 60 and above or
- Person 18 years of age or older with a disability or
- Caregiver in the Community

V. Location and Time of Services

Services will take place at Toolworks, 22 Battery St, Suite 300, San Francisco, CA . Hours of operation are from 8:30am-4:30pm, Monday to Friday.

VI. Description of Services

Aging and Disability Resource Centers (ADRC) provide information and referral, assistance, follow-up, and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities, and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts throughout San Francisco, with a concentration in areas that have dense populations of high need and with an ability to serve younger adults with disabilities. There are also 2 Citywide ADRCs, one with a focus on providing services to the LGBTQ+ community and the other focused on services for the disability community. Toolworks will be required to serve older adults, adults with disabilities, and caregivers as the Citywide ADRC focused on the disability community.

Grantee shall provide the following services during the term of this grant:

1. Grantee will conduct client assessments to identify service needs to be addressed;
2. Grantee will provide Information and Referral of services available in the community where client lives. Services include, but are not limited to adult day health care, care giver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, veterans services, vocational training, LGBTQ+ programs/services and transportation;
3. Grantee will provide assistance with referrals and applications for the services available to the individual. This may include translation, contacting agencies on behalf of the client, filling out forms, completing on-line referrals, etc.;
4. Grantee will provide follow-up to ensure that the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider;

5. Grantee will conduct a minimum of 3 outreach events per quarter per 1.0 FTE. At least one of these quarterly events should be conducted at a community center or senior service provider at a location within the supervisorial district. At least one of these quarterly events must target the adult with disability population.
6. Grantee will demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs can be met by their services.
7. Grantee will designate at least one 1.0 FTE as the ADRC service provider.
8. Grantee will offer back-up staff who can offer services in case of any absence.
9. Grantee will develop a procedure for keeping abreast of relevant programs and resources for clients.
10. Grantee will develop and demonstrate targeted outreach to adults with disabilities.
11. Grantee will conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services.
12. Grantee will participate in weekly staff consultations with Citywide ADRC Coordinator.
13. Grantee will work with Citywide ADRC Coordinator in developing and scheduling outreach events.
14. Grantee will participate in monthly ADRC group meeting/training organized and hosted by Citywide ADRC Coordinator.
15. Grantee will attend quarterly meeting between on-site supervisor and ADRC Coordinator.
16. Grantee will collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
17. Grantee will develop partnerships with other organizations working within the district to ensure a robust network of service provision.
18. Grantee will administer DAS client survey according to DAS direction and with a sample size of at least 25% of contracted unduplicated clients.
19. Grantee will ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
20. Grantee will make all efforts to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VII. Service Objectives

On an annual basis the grantee will complete the following in the quantities detailed in the table below:

	FY 24/25	FY 25/26
Unduplicated Consumers	600	600
Units of Information and Referral	800	800
Units of Assistance	900	900
Units of Follow-up	350	350
Outreach Events	12	12
Percentage of unduplicated consumers who are disabled.	15%	15%

VIII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys approved by DAS, and distributed, collected, and recorded by Grantee, with a sample size of at least 25% of consumers.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

IX. Reporting Requirements

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

- A.** Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B.** Grantee shall input all required data into SF DAS GetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg
 Program Analyst
 Department of Disability and Aging Services
 Sara.Hofverberg@SFgov.org

Patrick Garcia
 Senior Contract Manager
 Human Services Agency
 Patrick.Garcia@SFgov.org

X. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on 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 OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Grantee/Contractor: Toolworks			7/1/24 - 6/30/26
Program: Aging and Disability Resource Center (ADRC)			
New <input checked="" type="checkbox"/> Modification <input type="checkbox"/> Revision <input type="checkbox"/> Check One <input type="checkbox"/>			
	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/24 - 6/30/26
Expenses	Original	Original	Total
Salaries & Benefits	\$100,212	\$103,217	\$203,429
Operating-Direct	\$14,517	\$14,954	\$29,471
Subtotal	\$114,729	\$118,171	\$232,900
Indirect Percentage (%)			15%
Indirect Costs (Line 16 X Line 15)			
Consultant/Subcontractor (\$25,000+)			
COB Eligible Expenses	\$114,729	\$118,171	\$232,900
Direct Client Pass-Through			
Capital Expenses			
Total Expenses	\$114,729	\$118,171	\$232,900
HSA / DAS Revenues			
Total HSA / DAS Revenues	\$114,729	\$118,171	\$232,900
Grantee/Contractor Revenues			
Total Grantee/Contractor Revenues			
Total Revenues	\$114,729	\$118,171	\$232,900
Prepared by:			
Telephone No. & Email:			HSA Budget Form (3/24)

Grantee/Contractor: Toolworks											Appendix B, Page 2
Program: Aging and Disability Resource Center (ADRC)											
Salaries & Benefits Detail											
POSITION TITLE	Agency Totals		HSA Program		7/1/24 - 6/30/25	Agency Totals		HSA Program		7/1/25 - 6/30/26	7/1/24 - 6/30/26
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Original	Total
I&A Specialist	\$65,988	1.00	100%	1.00	\$65,988	\$67,967	1.00	100%	1.00	\$67,967	\$133,955
Director, Community Living	\$94,683	0.20	100%	0.20	\$18,937	\$97,523	0.20	100%	0.20	\$19,505	\$38,442
TOTALS	\$160,671	1.20	2.00	1.20	\$84,925	\$165,490	1.20	200%	1.20	\$87,472	\$172,397
FRINGE BENEFIT RATE	18%					18%					
EMPLOYEE FRINGE BENEFITS					\$15,287					\$15,745	\$31,032
TOTAL SALARIES & BENEFITS					\$100,212					\$103,217	\$203,429

HSA Budget Form (3/24)

Grantee/Contractor: Toolworks

Appendix B, Page 3

Program: Aging and Disability Resource Center (ADRC)

Operating Expenses Detail

	7/1/24 - 6/30/25 Original	7/1/25 - 6/30/26 Original	7/1/24 - 6/30/26 Total
<u>Expenditure Category</u>			
Rental of Property	\$14,517	\$14,954	
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)			
Rental of Equipment			
<u>Consultant/Subcontractor (\$25,000 & Under)</u>			
<u>Other</u>			
<u>Total Operating Expense</u>	\$14,517	\$14,954	

HSA Budget Form (3/24)