



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

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



London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DATE: JUNE 1, 2022

SUBJECT: NEW GRANTS: **LEGAL ASSISTANCE TO THE ELDERLY (NON-PROFIT)** TO PROVIDE HEALTH-RELATED LEGAL SERVICES AND LGBTQ+ LIFE PLANNING SERVICES

GRANT TERM: 7/1/22 – 6/30/24

GRANT AMOUNT:	New	Contingency	Total
	\$437,092	\$43,709	\$480,801

ANNUAL AMOUNT: See Table Below

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
Funding Source					
FUNDING:	\$437,092			\$43,709	\$480,801
PERCENTAGE:	100%				100%

DS
JG

The Department of Disability and Aging Services (DAS) requests authorization to enter into two new grant agreements with Legal Assistance to the Elderly (LAE) for the period from July 1, 2022 through June 30, 2024, in an amount of \$437,092, plus a 10% contingency for a total amount not to exceed \$480,801. The purpose of these grants is to provide health-related legal services and life planning legal services to older adults and adults with disabilities.

Program	7/1/22-6/30/23	7/1/23-6/30/24	Total	Contingency	Not to Exceed
Health-Related Legal Services	\$136,591	\$136,591	\$273,182	\$27,318	\$300,500
LGBTQ+ Life Planning Services	\$81,955	\$81,955	\$163,910	\$16,391	\$180,301
Total	\$218,546	\$218,546	\$437,092	\$43,709	\$480,801

Background

The original Dignity Fund new funding allocation of \$6 million dollars arrived in fiscal year 2017-2018 and supported a variety of new program initiatives designed to engage and support older adults and adults with disabilities. Included among these inaugural programs were the Health-Related Legal Services and LGBTQ+ Life Planning programs.

The San Francisco LGBT Aging Policy Task Force, through its March 2014 report, recognized that many LGBTQ+ older adults lacked basic life planning documents. Without these documents in place, LGBTQ+ older adults are not able to effectively express and ensure their wishes regarding medical care and end-of-life decision making. The task force recommended that services be developed to provide assistance in preparation of these documents, with a specific focus and competency for the LGBTQ+ community of San Francisco.

Health benefits and services help people manage their health conditions, cover increasing costs of healthcare, and are a major support in their ability to remain as independent as possible in their everyday lives. However, rights and entitlements related to health services are often confusing and not clear to consumers. Navigating the eligibility and appeal processes in order to maintain current services or access new and needed services can be complex and require familiarity with health-related laws and administrative law principles. These concerns were regularly heard during the first Dignity Fund Community Needs Assessment process from community members and our network of community based service providers and stakeholders.

In response to these concerns and recommendations, DAS funded the Health-Related Legal Services and LGBTQ+ Life Planning Services programs which first launched in April 2018.

Services to be Provided

Health-Related Legal Services

The Health-Related Legal Services program provides a legal services attorney position dedicated to assisting clients with resolving legal issues that are creating barriers within health services.

A sampling of some of the legal issues to be handled include:

- Denial of coverage and share of cost assessments for Medicare/Medical and private health insurance policies
- Medicare/Medical overpayments – especially those that threaten coverage, or a consumer’s ability to live independently or where housing is at risk
- Denial of Paratransit/Medical Transportation benefits
- Inappropriate hospital or rehabilitation facility discharge

Additionally, LAE will coordinate with the local HICAP (Health Insurance Counseling and Advocacy Program) and Long-Term Care Ombudsman program to increase awareness of legal program services and facilitate efficient referral of clients between the three programs.

LGBTQ+ Life Planning Services

LAE will be providing this service in collaboration (and through a subcontract) with AIDS Legal Referral Panel (ALRP) a community based organization focused on providing legal services for people with HIV/AIDS.

At its core, the LGBTQ+ Life Planning program will assist clients in completing and executing legally recognized life planning documents. Services will be designed to engage with clients to understand their needs and wishes, provide guidance on rights and decisions, and prepare and execute legal documents that best reflect those decisions.

LAE will additionally conduct regular outreach and education events targeting the LGBTQ+ community. These events will raise awareness of program services and provide some baseline information about life planning documents, health care benefits and rights, and advocacy services available to them.

Selection

Grantee was selected through Request for Proposals (RFP) #985, which was competitively bid in March of 2022.

Funding

Funding for this grant is provided by County General Funds, specifically the Dignity Fund.

ATTACHMENTS

Appendix A – Services to be Provided – Health-Related Legal Services

Appendix B – Budget – Health-Related Legal Services

Appendix A – Services to be Provided – LGBTQ+ Life Planning Services

Appendix B – Budget – LGBTQ+ Life Planning Services

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

LEGAL ASSISTANCE TO THE ELDERLY

HEALTH-RELATED LEGAL SERVICES

July 1, 2022 – June 30, 2024

I. Purpose

The purpose of this grant is to establish legal services focused specifically on helping older adults and adults with disabilities navigate rights and entitlements related to health services. Health benefits and services help people manage their health conditions, cover increasing costs of healthcare, and are a major support in their ability to remain as independent as possible in their everyday lives.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
California State Bar	The State Bar of California is the regulatory agency for the state's lawyers, charged with admitting and disciplining attorneys
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism
DAS	Department of Disability and Aging Services

Dignity Fund	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. Monies in the Fund shall be used to expend by DAS solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities.
Disability	A condition attributable to mental, cognitive or physical impairment, or a combination of mental, cognitive and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: Activities of Daily Living (ADL), and Instrumental Activities of Daily Living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Grantee	Legal Assistance to the Elderly (LAE)
HSA	Human Services Agency of the City and County of San Francisco
Legal Assistance/ Legal Services	Legal advice, and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person’s primary language.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older; used interchangeably with senior.
Senior	Person who is 60 years of age or older; used interchangeably

	with the term “older adult”
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.)

III. Target Population

Services shall be designed to engage one or more of the following target populations, which have been identified as demonstrating the greatest economic and social need:

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

IV. Eligibility for Services

- 1) A resident of San Francisco
- 2) Aged 60 + *or*
- 3) Aged 18 to 59 living with a disability *and*
- 4) In need of legal services offered through this program

V. Location and Time of Services

Services are provided at 1663 Mission Street, Suite 225, San Francisco, CA 94103. Hours of service are from 9:00 a.m. to 5:00 p.m, Monday through Friday.

VI. Description of Services

Legal services can be critical to maintaining or securing a better quality of life for older adults and adults with disabilities. Through legal assistance, clients are able to assert their rights in order to maintain current benefits or access new benefits critical to their health and well-being. Services delivered under this contract will include the following:

- 1) The Grantee will assist eligible consumers with a variety of legal issues pertaining to health care and/or health care related services to the extent covered by health-related laws. The health-related law legal service program will include, but is not limited to, legal assistance pertaining to the following:

- Denial of coverage and share of cost assessments for Medicare/Medical and private health insurance policies
- Medicare/Medical overpayments – especially those that threaten coverage, or a consumer’s ability to live independently or where housing is at risk
- Denial of Paratransit/Medical Transportation benefits
- Inappropriate hospital or rehabilitation facility discharge
- General health and benefit rights
- Other areas as determined in need and approved by DAS

2) Clients needing legal services will go through an initial screening process. Grantee will categorize the service they give into the following four service types:

Information and Referral – the client concern is more appropriately referred to another service for assistance

Advise and Close – the client issue is very easily addressed, advice is provided and the case is closed

Brief Services – the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.

Case Acceptance – the client issue warrants more extensive legal representation and a case file is opened

3) Grantee is expected to keep up with changes in the law that affect seniors and adults with disabilities, particularly in the areas in which services are provided. Grantee should be prepared to serve a diverse population.

4) Grantee will be provided with a copy of the California Department of Aging’s California Statewide Guidance for Legal Assistance. While non-binding, the guidelines should be considered for guidance and technical assistance in the development and provision of legal services.

5) Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships to help develop and maintain a comprehensive citywide approach to legal service issues.

6) The Grantee will establish and maintain partnerships and mutually beneficial communication with community organizations, health clinics, City departments, and other relevant legal aid providers and organizations with the intent of reaching the target population and to ensure a streamlined referral process for consumers between programs as appropriate. The Grantee will develop memorandum of understandings (MOUs) with the local organizations that provide the Health Insurance Counseling and Advocacy (HICAP) and Long-Term Ombudsman programs.

7) The Grantee will keep current with health-related laws, rules, and regulations that have a potential impact on the older adult and adult with disabilities populations.

8) The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and other security and privacy rules and regulations as applicable.

VII. Service Objectives

On an annual basis, starting July 1, 2022:

- Grantee will enroll and provide legal assistance to at least **115** unduplicated consumers
- Grantee will provide a minimum of **1,728** hours of legal assistance pertaining to health care or health care related services.

VIII. Outcome Objectives

Grantee will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via an online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25th each year

- 2nd Quarter (covering October, November, December) due January 25th each year
- 3rd Quarter (covering January, February, March) due April 25th each year
- 4th Quarter (covering April, May, June) due July 25th each year

IX. Reporting Requirements

1. The Grantee will track and record the units of service received by enrolled consumers in CA GetCare by the 5th working day of the month for the preceding month.
2. The Grantee will enter monthly reports into the CARBON database system which includes number of enrolled consumers and hours of services provided.
3. The Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII & VIII. This report will also include accomplishments and challenges encountered by the Grantee.
4. The Grantee shall issue a fiscal closeout report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted in the CARBON system. Additional reports may be requested and required at other points during the fiscal year.
5. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
6. The Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by DAS/HSA. The due date for submitting the annual summary report is no later than July 10 each grant year.
7. The Grantee shall develop and deliver ad hoc reports as requested by HSA and/or DAS.

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

Rocio Duenas
Rocio.Duenas@sfgov.org
Contract Manager
Office of Contract Management

and

Reanna Albert
Reanna.Albert@sfgov.org
Program Analyst
Department of Disability and Aging Services

X. Monitoring Activities

1. **Program Monitoring:** Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on Ca.GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to this Appendix A – Services to be Provided.

2. **Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Term	
6	Legal Assistance to the Elderly		7/1/22-6/30/24	
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Health-Related Legal Services			
10	Budget Reference Page No.(s)			7/1/22-6/30/24
11	Program Term	7/1/22-6/30/23	7/1/23-6/30/24	Total
12	Expenditures			
13	Salaries & Benefits	\$106,175	\$106,175	\$212,350
14	Operating Expenses	\$12,600	\$12,600	\$25,200
15	Subtotal	\$118,775	\$118,775	\$237,550
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$17,816	\$17,816	\$35,633
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0
19	Total Expenditures	\$136,591	\$136,591	\$273,182
20	HSA Revenues			
21	General Fund	\$136,591	\$136,591	\$273,182
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$136,591	\$136,591	\$273,182
30	Other Revenues			
31				
32	LAE General Fundrasing	\$15,979	\$15,979	\$31,958
33				
34				
35				
36	Total Revenues	\$152,570	\$152,570	\$305,140
37	Full Time Equivalent (FTE)	0.95	0.95	1.90
39	Prepared by:	Telephone No.:		
40	HSA-CO Review Signature:	_____		
41	HSA #1	12/2/2020		

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	Legal Assistance to the Elderly							
4	Program: Health-Related Legal Services							
5								
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11						7/1/22-6/30/23	7/1/23-6/30/24	7/1/22-6/30/24
12		Agency Totals		HSA Program		DAS	DAS	TOTAL
		Annual Full TimeSalary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Staff Attorney	\$91,250	1.00	100%	0.92	\$83,795	\$83,795	\$167,590
14	Grants Coordinator	\$61,000	1.00	3%	0.03	\$1,830	\$1,830	\$3,660
16								
17								
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30	TOTALS	\$152,250	3.00	106%	0.95	\$85,625	\$85,625	\$171,250
31								
32	FRINGE BENEFIT RATE	24%						
33	EMPLOYEE FRINGE BENEFITS	\$36,540				\$20,550	\$20,550	\$41,100
34								
35								
36	TOTAL SALARIES & BENEFITS	\$188,790				\$106,175	\$106,175	\$212,350
37	HSA #2	12/2/2020						

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3	Legal Assistance to the Elderly									
4	Program: Health-Related Legal Services									
5										
6										
7	Operating Expense Detail									
8										
9										
10										
11										
12	<u>Expenditure Category</u>				<u>TERM 7/1/22-6/30/23</u>		<u>7/1/23-6/30/24</u>			<u>TOTAL</u> <u>7/1/22-6/30/24</u>
13	Rental of Property				\$6,353		\$6,353			\$12,706
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$315		\$315			\$630
15	Office Supplies, Postage				\$1,127		\$1,127			\$2,254
16	Building Maintenance Supplies and Repair									
17	Printing and Reproduction				\$31		\$31			\$62
18	Insurance				\$912		\$912			\$1,824
19	Staff Training				\$377		\$377			\$754
20	Staff Travel-(Local & Out of Town)				\$157		\$157			\$314
21	Rental of Equipment				\$159		\$159			\$318
22										
23	CONSULTANTS									
24	IT Support				\$755		\$755			\$1,510
25	Database Support				\$315		\$315			\$630
26	Diversity, Equity and Inclusion Consultant				\$472		\$472			\$944
27										
28	OTHER									
29	Cloud Based Services				\$377		\$377			\$754
30	California State Bar Dues				\$420		\$420			\$840
31	Legal Research Resources				\$830		\$830			\$1,660
33	TOTAL OPERATING EXPENSE				\$12,600		\$12,600			\$25,200
34										
35	HSA #3									12/2/2020

APPENDIX A - SERVICES TO BE PROVIDED BY GRANTEE

LEGAL ASSISTANCE TO THE ELDERLY

LGBTQ+ LIFE PLANNING SERVICES

July 1, 2022 – June 30, 2024

I. Purpose

The legal service program funded by this grant is intended to ensure that LGBTQ+ older adults and adults with disabilities have access to legal services that prepare legally valid life planning documents to express their individual wishes and decisions in the event that they are unable to do so and/or upon their death.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
At Risk of Institutionalization	To be considered at risk of institutionalization, a person must have, at a minimum, one of the following: 1) functional impairment in a minimum of two Activities of Daily Living (ADL): eating, dressing, transfer, bathing, toileting, and grooming; or 2) a medical condition to the extent requiring the level of care that would be provided in a nursing facility; or 3) be unable to manage his/her own affairs due to emotional and/or cognitive impairment, evidenced by functional impairment in a minimum of three Instrumental Activities of Daily Living (IADLs): preparing meals, managing money, shopping for groceries or personal items, performing housework, using a telephone.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
California State Bar	The State Bar of California is the regulatory agency for the state's lawyers, charged with admitting and disciplining attorneys.
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Communities of Color	An inclusive term and unifying term for persons who do not identify as White, who have been historically and systemically disadvantaged by institutionalized and interpersonal racism
DAS	Department of Disability and Aging Services
Dignity Fund	The City and County of San Francisco, City Charter, Sections 16.128-1 through 16.128-12. Monies in the Fund

	shall be used to expend by DAS solely to help seniors and adults with disabilities secure and utilize the services and support necessary to age with dignity in their own homes and communities.
Disability	A condition attributable to mental, cognitive or physical impairment, or a combination of mental, cognitive and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: 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.
Education	Preparation and presentation of information designed to educate the target populations on life planning documents, health care benefits, rights, and advocacy services available to them. Time spent in delivery of this service will include preparation and travel time.
Grantee	Legal Assistance to the Elderly (LAE)
HSA	Human Services Agency of the City and County of San Francisco
Legal Assistance/ Legal Services	Legal advice and representation provided by an attorney to older adults and/or adults with disabilities with economic or social needs; and includes – (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro se assistance.
Life Planning Legal Services	Services provided to individuals to aid in the drafting and execution of life planning documents
LGBTQ+	An acronym/term used to refer to persons who self-identify as non-heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Life Planning Documents	Documents that state an individual’s wishes in the event that they are unable to do so and or upon an individual’s death. These documents encompass medical decision-making, the disposition of assets upon incapacity or death, and disposition of a decedent remains.
Limited English-Speaking Proficiency	Any person who does not speak English well or is otherwise unable to communicate effectively in English because English is not the person’s primary language.

Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older; used interchangeably with “senior”
Outreach	Formal and informal approaches used to engage the target population(s). Formal approaches can include, but are not limited to, one to one contact and/or working with a community collaborative group. Informal approaches can include, but are not limited to, designated staff being present and available in community spaces (i.e. community centers).
Senior	Person who is 60 years or older; used interchangeably with the term “older adult”
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.)

III. Target Population

Services shall be designed to engage one or more of the following target populations, which have been identified as demonstrating the greatest economic and social need:

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

IV. Eligibility for Services

To be eligible for services, clients must be:

1. A resident of San Francisco *and*
2. An older adult aged 60 years or older *or*
3. An adult with a disability ages 18-59 *and*

4. In need of legal services offered through this program

V. Location and Time of Services

Services are provided at 1663 Mission Street, Suite 225, San Francisco, CA 94103. Hours of service are from 9:00 a.m. to 5:00 p.m., Monday through Friday.

VI. Description of Services

The Grantee will educate eligible consumers about life planning documents with a particular focus on any documents and/or laws that have a specific impact on the LGBTQ+ population.

Grantee will also advise and provide guidance as to the life planning document(s) that best meet their expressed need and will aid consumers in completing and executing legally recognized life planning documents. Legally recognized life planning documents include, but are not limited to, the following:

- Wills and trusts
- Power of attorney for financial decision-making and/or medical decision-making
- Advance health care directive
- HIPAA release
- Hospital visitation authorization
- Instructions for the disposition of a decedent's remains
- Other areas as determined in need and approved by DAS

The Grantee will conduct outreach as defined in Section II with the intent of reaching the target population described in Section III and who are in need and seeking life planning legal services. Outreach will be accomplished by the Grantee in multiple ways, including the provision of education as defined in Section II and the promotion of the Life Planning Legal Service Program for LGBTQ+ older adults and adults with disabilities to consumers, community organizations, health clinics, other legal aid providers, and relevant City departments and/or funded programs.

The Grantee will establish and maintain partnerships and mutually beneficial communication with community organizations, health clinics, City departments, and other relevant legal aid providers and organizations with the intent of reaching the target population and to ensure a streamlined referral process for consumers between programs as appropriate.

The Grantee will work in conjunction with other service providers, and when necessary, health care providers to carefully assess and triage consumer needs as it relates to life planning legal services.

The Grantee will keep current with life planning related laws, rules, regulations that have a potential impact on the LGBTQ+ older adult and adult with disabilities populations and will provide culturally and linguistically appropriate legal assistance and services.

The Grantee will maintain the ability to provide legal services pertaining to life planning related laws as described in this grant agreement, and to prepare and execute legally-recognized documents. These legal services will be provided by qualified individual(s).

The Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. While non-binding, the guidelines should be considered for guidance and technical assistance in the development and provision of legal services.

The Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and DAS to help develop and maintain a comprehensive citywide approach to legal service issues as well as discuss any relevant issues pertaining to the Life Planning Legal Service Program for LGBTQ+ older adults and adults with disabilities.

The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) as applicable.

The Grantee will create and give a consumer satisfaction survey with Likert-type scales that includes a comment section for consumers' additional feedback to all consumers who receive legal services under this grant agreement. The survey must capture the necessary data to report on the outcome objectives defined in Section VIII – Outcome Objectives. DAS shall be provided with a copy of the consumer satisfaction survey each fiscal year.

VII. Service Objectives

On an annual basis, starting July 1, 2022:

- Grantee will enroll and provide legal assistance to at least **75** unduplicated consumers
- Grantee will provide a minimum of **922** units* of life planning legal services
- Grantee will provide a minimum of **20** units* of staffing to conduct outreach and education

*A unit is one hour

VIII. Outcome Objectives

Outcome objectives measuring impact of this program shall be completed through the administration of an annual client survey, measuring the following:

1. Clients report enhanced understanding of how life planning documents and services can help protect their preferences and decisions. Target: 75%
2. Clients report being more confident that their preferences and decisions will be honored. Target: 75%
3. Clients feel safe and welcomed by program staff. Target: 100%
4. Clients rate the quality of services they received as good or excellent. Target: 100%

Administration and format of survey must be reviewed and approved by DAS program analyst in advance of survey administration.

IX. Reporting Requirements

1. The Grantee will track and record the units of service received by enrolled consumers in CA.GetCare by the 5th working day of the month for the preceding month.
2. The Grantee will enter monthly reports into the CARBON database system which includes number of enrolled consumers and hours of services provided by the 15th of the following month.
3. The Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VII & VIII- Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee.
4. The Grantee shall issue a fiscal closeout report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted in the CARBON system.
5. The Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
6. The Grantee shall develop and deliver an annual summary report of SOGI data collected in each grant year as requested by DAS/HSA. The due date for submitting the annual summary report is no later than July 10th each grant year.
7. The Grantee will provide an annual consumer satisfaction survey report to DAS by March 15 each grant year or a mutually agreed upon date between DAS and the Grantee. Survey completion rate should be at least 35% of enrolled clients in the survey year.
8. The Grantee shall develop and deliver ad hoc reports as requested by HSA and/or DAS.

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

Rocio Duenas
Rocio.Duenas@sfgov.org
Contract Manager
Office of Contract Management

Or

Reanna Albert
Reanna.Albert@sfgov.org

Program Analyst
Department of Disability and Aging Services

X. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; consumer eligibility and any targeted mandates, back up documentation for the units of service and all reporting including the log of service units which is based on the service provision hours; sign-in sheets of consumers who participated in services, and progress of service and outcome objectives; how consumer records are collected and maintained; reporting performance including monthly service unit reports on Ca.GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting, evidence that program staff have completed Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all DAS funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current; a board of director list and whether services are provided appropriately according to Sections IV, VI, and VII.

- 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.

	A	B	C	D
1	Appendix B, Page 1			
2				
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name		Term	
6	Legal Assistance to the Elderly		7/1/22-6/30/24	
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: LGBTQ+ Life Planning Services			
10	Budget Reference Page No.(s)			7/1/22-6/30/24
11	Program Term	7/1/22-6/30/23	7/1/23-6/30/24	Total
12	Expenditures			
13	Salaries & Benefits	\$36,702	\$36,702	\$73,403
14	Operating Expenses	\$4,146	\$4,146	\$8,292
15	Subtotal	\$40,848	\$40,848	\$81,695
16	Indirect Percentage (%)	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$6,127	\$6,127	\$12,254
18	Subcontractor/Capital Expenditures	\$34,980	\$34,980	\$69,960
19	Total Expenditures	\$81,955	\$81,955	\$163,910
20	HSA Revenues			
21	General Fund	\$81,955	\$81,955	\$163,910
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$81,955	\$81,955	\$163,910
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$81,955	\$81,955	\$163,910
37	Full Time Equivalent (FTE)	0.62	0.62	1.24
39	Prepared by:	Telephone No.:		
40	HSA-CO Review Signature:	_____		
41	HSA #1	12/2/2020		

	A	B	C	D	E	F	G	H
1	Appendix B, Page 2							
2								
3	Legal Assistance to the Elderly							
4	Program: LGBTQ+ Life Planning Services							
5								
6								
7	Salaries & Benefits Detail							
8								
9								
10								
11						7/1/22-6/30/23	7/1/23-6/30/24	7/1/22-6/30/24
		Agency Totals		HSA Program		DAS	DAS	TOTAL
		Annual Full TimeSalary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE							
13	Executive Director	\$125,000	1.00	3%	0.03	\$3,750	\$3,750	\$7,500
14	Staff Attorney	\$93,200	1.00	13%	0.13	\$12,116	\$12,116	\$24,232
15	Staff Attorney	\$78,200	1.00	16%	0.16	\$12,512	\$12,512	\$25,024
16	Grants Coordinat	\$61,000	1.00	2%	0.02	\$1,220	\$1,220	\$2,440
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30	TOTALS	\$357,400	4.00	34%	0.34	\$29,598	\$29,598	\$59,196
31								
32	FRINGE BENEFIT RATE	24%						
33	EMPLOYEE FRINGE BENEFITS	\$85,776				\$7,104	\$7,104	\$14,207
34								
35								
36	TOTAL SALARIES & BENEFITS	\$443,176				\$36,702	\$36,702	\$73,403
37	HSA #2	12/2/2020						

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 3									
2										
3	Legal Assistance to the Elderly									
4	Program: LGBTQ+ Life Planning Services									
5										
6										
7	Operating Expense Detail									
8										
9										
10										
11	TOTAL									
12	<u>Expenditure Category</u>			TERM	<u>7/1/22-6/30/23</u>		<u>7/1/23-6/30/24</u>			<u>7/1/22-6/30/24</u>
13	Rental of Property				\$2,124		\$2,124			\$4,248
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$105		\$105			\$210
15	Office Supplies, Postage				\$377		\$377			\$754
16	Building Maintenance Supplies and Repair									
17	Printing and Reproduction				\$10		\$10			\$20
18	Insurance				\$304		\$304			\$608
19	Staff Training				\$100		\$100			\$200
20	Staff Travel-(Local & Out of Town)				\$25		\$25			\$50
21	Rental of Equipment				\$53		\$53			\$106
22										
23	CONSULTANTS									
24	IT Support				\$252		\$252			\$504
25	Database Support				\$105		\$105			\$210
26	Diversity, Equity and Inclusion Consultant				\$158		\$158			\$316
27										
28	OTHER									
29	Cloud Based Services				\$126		\$126			\$252
30	California State Bar Dues				\$122		\$122			\$244
31	Legal Research Resources				\$285		\$285			\$570
32	TOTAL OPERATING EXPENSE				\$4,146		\$4,146			\$8,292
33										
34	HSA #3									12/2/2020

	A	B	C	D	E
1					Appendix B, Page 4
2					
3		Legal Assistance to the Elderly			
4		Program: LGBTQ+ Life Planning Services			
5					
6					
7					
8		Subcontractor/Capital Expenditures			
9					
10		SUBCONTRACTORS	7/1/22-6/30/23	7/1/23-6/30/24	7/1/22-6/30/24
11		AIDS Legal Referral Panel	\$34,980	\$34,980	\$69,960
12					
13					
14					
15					
16		TOTAL SUBCONTRACTOR COST	\$34,980	\$34,980	\$69,960
17					
18					
19		EQUIPMENT	7/1/22-6/30/23	7/1/23-6/30/24	7/1/22-6/30/24
20	Units	ITEM/DESCRIPTION			
21					
22					
23					
24					
25		TOTAL EQUIPMENT COST	\$0	\$0	\$0
26					
27		OTHER	7/1/22-6/30/23	7/1/23-6/30/24	7/1/22-6/30/24
28		Description:			
29					
30					
31					
32		TOTAL REMODELING COST	\$0	\$0	\$0
33					
34		TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE	\$34,980	\$34,980	\$69,960
35					
36		HSA #4			12/2/2020