



Edwin M. Lee, Mayor

Department of Human Services  
Department of Aging and Adult Services

Trent Rhorer, Executive Director  
Shireen McSpadden, Executive Director

**MEMORANDUM**

TO: AGING and ADULT SERVICES COMMISSION

THROUGH: SHIREEN MCSPADDEN, EXECUTIVE DIRECTOR

FROM: MELISSA MCGEE, ACTING DEPUTY DIRECTOR  
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS

DATE: AUGUST 3, 2016

SUBJECT: NEW GRANT: **FAMILY SERVICES AGENCY OF SAN FRANCISCO**  
**dba FELTON INSTITUTE (NON-PROFIT) FOR COMMUNITY LIAISONS**  
**AT THE 2 GOUGH SERVICES HUB**

GRANT TERM: Amount      Contingency      Total  
8/1/16-  
6/30/17

TOTAL AMOUNT: \$58,812      \$5,881      \$64,693

ANNUAL AMOUNT: FY16/17  
\$58,812

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$58,812			\$5,881	\$64,693
PERCENTAGE:	100%				100%

The Department of Aging and Adult Services requests authorization to enter into a new grant with Felton Institute for the time period beginning August 1, 2016 and ending on June 30, 2017, in the amount of \$58,812 plus a 10% contingency for a total amount not to exceed \$64,693. The purpose of the grant is to have Community Liaisons greet and provide basic service information to individuals entering the the 2 Gough DAAS services site.

**Background**

Since the recent opening of the new 2 Gough DAAS services hub site, the department has identified a need for Community Liaisons who will assist on-site staff to aid seniors and adults with disabilities in finding appropriate services within the new service center.

This grant seeks to pilot a project to develop and provide employment opportunities for seniors and adults with disabilities, and to support the mission of the new 2 Gough Hub by improving service flow and customer experience. The relatability the Community Liaisons will have with the target populations the 2

Gough site serves is central to this program's design. Grantee was identified through an informal bid as best qualified to manage the provision of these Liaisons.

### **Services to be Provided**

Grantee will administer all aspects of the 2 Gough Hub Community Liaisons program including program coordination, site coordination for Community Liaisons, and the recruitment, training, and employment of Community Liaisons. Grantee will coordinate with DAAS supervisory staff on-site at the 2 Gough Hub in order to most effectively staff and utilize the Community Liaisons. The Liaisons will:

- Ensure excellent customer service by engaging all Customers with courtesy, respect, and consideration
- Listen to Customers' needs and observe for any language and/or functional needs
- Assist Customers waiting in lobby as needed
- Report to Lobby Supervisor; inform Lobby Supervisor when uncertain questions or situations arise
- Request assistance from Building Security as needed
- Help make people feel comfortable
- Discuss available services
- Help people fill out forms
- Distribute and collect questionnaires
- Ask people about their experience at the center
- Perform outreach
- Distribute handouts, maps
- Provide directions to other service providers
- Perform end-of-day closing functions including checking public areas for Customers; cleaning, closing, and returning technology and other devices
- Perform other duties as assigned

### **Selection**

Grantee was selected through Informal Bid #673, which was competitively bid in January 2016.

### **Funding**

This grant will be funded entirely through City and County General funds.

### **ATTACHMENTS**

Appendix A – Services to be Provided

Appendix B – Program Budget

**APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE**  
**Family Service Agency dba Felton Institute**  
**2 Gough Hub Community Liaisons**  
**Effective 8/1/2016-6/30/2017**

**I. Purpose of Grant**

The purpose of this grant is to place Community Liaisons at the new 2 Gough Hub services site for the purpose of greeting and directing incoming DAAS clients to the appropriate services location. This program will provide employment opportunities for seniors and younger adults living with a disability, who will be recruited by the grantee to serve as Community Liaisons. This program supports the mission of the new 2 Gough Hub by improving service flow and customer experience.

**II. Definitions**

**Adult with Disability:** Person 18 years of age or older living with a disability.

**Community Liaison:** Senior or younger adult (18-59) with disability engaged in part-time employment to support of the overall function of the 2 Gough Hub.

**Customer:** Individual seeking services at the 2 Gough Hub.

**DAAS:** Department of Aging and Adult Services

**Disability:** A condition attributable to mental or physical impairment, or a combination of mental 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: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.

**Frail:** An older individual is determined to be functionally impaired because the individual either: (a) Is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or to others.

**Grantee:** Felton/Family Service Agency of San Francisco

**HSA:** Human Services Agency of the City and County of San Francisco

**Senior:** Person who is 60 years or older.

**III. Target Population**

The 2 Gough Hub is being established as a ‘brick and mortar’ service center for residents of San Francisco needing to access the variety of services administered by the City of San Francisco’s Department of Aging and Adult Services. Since these services are targeted towards individuals 60 years

of age or older or individuals between 18 and 59 years of age that are living with a disability, it is expected that the Community Liaisons program should reflect this target population within its own corps. By reflecting the community which it seeks to serve, the Community Liaisons program will help create a more familiar and empathetic environment for those accessing services at the 2 Gough Hub. As a result, Community Liaisons should be members of one or more of the following target groups:

In particular:

- Resident of San Francisco
- Senior or younger adult living with a disability
- Bi-lingual
- LGBT
- Veteran

#### **IV. Further Eligibility to be enrolled as a 2 Gough Hub Community Liaisons**

The 2 Gough Hub Community Liaisons program also seeks to provide employment opportunities for participants. Further eligibility criteria for Community Liaisons include:

- be 60 years of age or older or a younger adult living with a disability
- meet income eligibility guidelines to be determined
- be determined by a physical examination to be capable of serving the frail elderly or adults with exceptional needs without physical detriment to either themselves or the adult served;
- be willing to accept supervision as required;
- be willing to serve from 4 to 20 hours per week;
- be willing to receive pre-service orientation training before assignment and ongoing in-service training thereafter

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

Services are delivered at the DAAS Hub, located at 2 Gough Street, San Francisco, CA 94103. Regular business hours are Monday through Friday, 8 am – 5 pm.

#### **VI. Description of Services**

Grantee will administer all aspects of the 2 Gough Hub Community Liaisons program including program coordination, site coordination for Community Liaisons, and the recruitment, training, and employment of Community Liaisons. Grantee will coordinate with DAAS supervisory staff on-site at the 2 Gough Hub in order to most effectively staff and utilize the Community Liaisons.

Core functions of Community Liaisons position:

- Ensure excellent customer service by engaging all Customers with courtesy, respect, and consideration
- Listen to Customers' needs and observe for any language and/or functional needs
- Assist Customers waiting in lobby as needed

- Report to Lobby Supervisor; inform Lobby Supervisor when uncertain questions or situations arise
- Request assistance from Building Security as needed
- Help make people feel comfortable
- Discuss available services
- Help people fill out forms
- Distribute and collect questionnaires
- Ask people about their experience at the center
- Perform outreach
- Distribute handouts, maps
- Provide directions to other service providers
- End of day closing functions including checking public areas for Customers; cleaning, closing, and returning technology and other devices
- Other duties as assigned

## VII. Service Objectives

On an annual basis, the Grantee will work toward creating employment opportunities for seniors and younger adults living with a disability by meeting the following service objectives:

- Provide at least **1518** hours of Community Liaisons staffing time at the 2 Gough Hub, based on an average of **33** hours of staffing time for each week of 2 Gough Hub operation. (Calculation is based on 46 weeks of staffing time during grant year, allowing for some initial program development and recruitment.)
- Provide Community Liaisons employment to at least **4** unduplicated consumers.

## VIII. Outcome Objectives

On an annual basis and as needed, Grantee will report progress towards meeting the following outcome Objectives:

### A. Community Liaison Satisfaction Outcomes

- 100% of Community Liaisons will complete a Satisfaction Survey on an annual basis.
- At least 75% of Community Liaisons will report that this program has helped improve their lives.
- At least 75% of Community Liaisons will report that they would like to continue in this program.

### B. Customer Satisfaction Outcomes

- An annual consumer satisfaction survey will be administered to customers receiving services at the 2 Gough Hub.
- At least 25% of respondents will report receiving assistance from a Community Liaison
- At least 50% of respondents interacting with Community Liaisons will report that the Community Liaisons were helpful in their visit to 2 Gough Hub.
- At least 50% of respondents will report that the Community Liaison position contributed to a helpful, friendly, and efficient service environment.

## **IX. Reporting Requirements**

- A. Grantee will enter into CA GetCare the consumer data including the Intake Form by the 5<sup>th</sup> working day of the month for the preceding month's services.
- B. Monthly reports must be entered into the Contracts Administration, Billing and Reporting Online (CARBON) system for each unit of service delivered during the reporting period for each service listed in Section VII of the Services to be Provided.
- C. 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 to the CARBON system.
- D. Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to Appendices F & G to the Grant Agreement.
- E. 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.
- F. Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA.
- H. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA's format) with details about the program.
- I. For assistance with reporting requirements or submission of reports, please contact:

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Contracts Manager/HSA  
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## **X. Monitoring Activities**

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

- 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, and HIPAA compliance.

	A	B	C	D
1	Appendix B, Page 1			
2	Document Date:			6/2/2016
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>			
4	<b>BY PROGRAM</b>			
5	Name		Term	
6	Felton / Family Service Agency of San Francisco		8/1/16 - 6/30/17	
7	(Check One) New <input type="checkbox"/> Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: 2 Gough Hub Community Liaisons			
10	Budget Reference Page No.(s)			Total
11	Program Term			8/1/16-6/30/17
12	<b>Expenditures</b>			
13	Salaries & Benefits		\$50,982	\$50,982
14	Operating Expense		\$293	\$293
15	<b>Subtotal</b>		<b>\$51,275</b>	<b>\$51,275</b>
16	Indirect Percentage (%)		14.70%	14.70%
17	Indirect Cost (Line 16 X Line 15)		\$7,537	\$7,537
18	Capital Expenditure		\$0	\$0
19	Total Expenditures		\$58,812	\$58,812
20	<b>HSA Revenues</b>			
21	General Fund		\$58,812	\$58,812
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES		\$58,812	\$58,812
30	<b>Other Revenues</b>			
31				
32				
33				
34				
35				
36	Total Revenues		\$58,812	\$58,812
37	Full Time Equivalent (FTE)		0.98	0.98
39	Prepared by: Marvin Davis		Telephone No.: 415-474-7310	Date 6/2/16
40	HSA-CO Review Signature: _____			
41	HSA #1			11/15/2007



	A	B	C	D	E	F	G	H
1							Appendix B, Page 2	
2							Document Date:	6/2/2016
3	Felton Institute/FSA							
4	Program Name: 2 Gough Hub Community Liaisons							
5	(Same as Line 9 on HSA #1)							
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10								
11	8/1/16 - 6/30/17							
12		Agency Totals		For HSA Program		For DHS Program		TOTAL
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary		8/1/16-6/30/17
13	Program Manager	\$49,000	100%	10%	10%	\$4,900		\$4,900
14	Community Liaison - Cantonese	\$39,000	100%	24%	24%	\$9,360		\$9,360
15	Community Liaison - Spanish	\$39,000	100%	24%	24%	\$9,360		\$9,360
16	Community Liaison - Tagalog	\$39,000	100%	24%	24%	\$9,360		\$9,360
17	Community Liaison - Sign Language	\$39,000	100%	16%	16%	\$6,240		\$6,240
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28	TOTALS	\$205,000	5.00	0.98	0.98	\$39,220		\$39,220
29								
30	FRINGE BENEFIT RATE	29.99%						
31	EMPLOYEE FRINGE BENEFITS	\$61,480				\$11,762		\$11,762
32								
33								
34	TOTAL SALARIES & BENEFITS	\$266,480				\$50,982		\$50,982
35	HSA #2	11/15/2007						

	A	B	C	D	E	F	G	H	I
1	Appendix B, Page 3								
2	Document Date:								6/2/2016
3									
4	Felton Institute/FSA								
5	Program Name: 2 Gough Hub Community Liaisons								
6									
7	<b>Operating Expense Detail</b>								
8									
9									
10									
11									
12	<u>Expenditure Category</u>				<u>TERM 8/1/16-6/30/17</u>				<u>TOTAL</u> 8/1/16-6/30/17
13	Rental of Property								
14	Utilities(Elec, Water, Gas, Phone, Scavenger)								
15	Office Supplies, Postage								
16	Building Maintenance Supplies and Repair								
17	Printing and Reproduction								
18	Insurance								
19	Staff Training					\$293			\$293
20	Staff Travel-(Local & Out of Town)								
21	Rental of Equipment								
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE								
23									
24									
25									
26									
27									
28	OTHER								
29									
30									
31									
32									
33									
34									
35	TOTAL OPERATING EXPENSE					\$293			\$293
36									
37	HSA #3								
	11/15/2007								