



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

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

TO:	DISABILITY AND AGING SERVICES COMMISSION				
THROUGH:	KELLY DEARMAN, EXECUTIVE DIRECTOR				
FROM:	CINDY KAUFFMAN, DEPUTY DIRECTOR ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS				
DATE:	JULY 7, 2021				
SUBJECT:	NEW GRANTS: MULTIPLE GRANTEES FOR THE PROVISION OF AN ALZHEIMER'S DAY CARE RESOURCE CENTER FOR OLDER ADULTS AND ADULTS WITH DISABILITIES				
GRANT TERM:	7/1/2021 – 6/30/2024				
GRANT AMOUNTS:	See Table Page 2				
FUNDING SOURCE:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$1,410,000			\$141,000	\$1,551,000
PERCENTAGE	100%				100%

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London Breed
Mayor

Trent Rhorer
Executive Director

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with multiple providers for the time period beginning July 1, 2021 and ending June 30, 2024 in the combined amount of \$1,410,000, plus a 10% contingency for a total not to exceed amount of \$1,551,000. The purpose of the grants is to assist individuals with Alzheimer's disease and other dementia related disorders to remain in the community by providing them with opportunities for enhanced care and meaningful social, physical, and emotional engagement. The Alzheimer's Day Care Resource Centers (ADCRCs) also provide respite care and support to families and caregivers. The funding amounts are detailed in the table on the next page.

Grantee	FY 21/22	FY 22/23	FY 23/24	Grant Total	10% Contingency	Total Not to Exceed
Catholic Charities	\$130,000	\$130,000	\$130,000	\$390,000	\$39,000	\$429,000
Institute on Aging	\$115,000	\$115,000	\$115,000	\$345,000	\$34,500	\$379,500
Self-Help for the Elderly	\$115,000	\$115,000	\$115,000	\$345,000	\$34,500	\$379,500
SteppingStone	\$110,000	\$110,000	\$110,000	\$330,000	\$33,000	\$363,000
Total	\$470,000	\$470,000	\$470,000	\$1,410,000	\$141,000	\$1,551,000

Background

Alzheimer's Day Care Resource Centers (ADCRCs) are community-based programs that serve individuals with Alzheimer's disease and other dementia related disorders, whose care needs make it difficult for them to participate in other community-based programs. The operation of an ADCRC takes place within the existing structure and licensure of an Adult Day Program or Adult Day Health Care center. ADCRCs help individuals with Alzheimer's disease and related dementias remain part of the community by providing trained staff and guided opportunities for social, physical, and emotional engagement. ADCRCs also provide counseling, training, support, and respite to families and caregivers. ADCRCs rely on trained volunteers to support program staff in the provision of services.

Services to be Provided

Grantees will operate an Alzheimer's Day Care Resource Center within the framework of a licensed Adult Day Program or Adult Day Health Care center to provide the services necessary to meet the needs of participants with Alzheimer's Disease or other dementia related disorders. Grantees will maintain a physical environment suitable to caring for participants with conditions associated with dementia and provide respite for the participant's primary caregivers. Services are comprised of four categories: 1) day program services, 2) caregiver support, 3) volunteer services, and 4) education.

The ADCRCs will provide participants with enriching activities and socialization opportunities, and encourage participant engagement. Grantees will also develop, organize, and provide training to professionals and other persons caring for the participants. Program staff will disseminate information to the public regarding Alzheimer's disease and related dementias, and provide supportive counseling and resources to families, caregivers, and the general public. Trained volunteers will be part of the care teams and will be included in ongoing ADCRC trainings.

In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

Individuals eligible for ADCRC services must be San Francisco residents, 18 years and older, and living with a disability, or have functional needs or difficulties sustaining activities of daily living and will benefit from assistance or supervision in maintaining independence. Individuals must be deemed to have Alzheimer's disease or other dementia related disorders, particularly in the middle to late stages, and their care needs and behavior may make it difficult to participate in community programs or other social settings.

Selection

Grantees were selected through RFP #872 issued on April 2, 2021.

Funding

Funding for these grants is provided by County General Funds.

ATTACHMENTS

Catholic Charities of San Francisco

Appendix A-Services to be Provided

Appendix B-Program Budget

Appendix F-Site Chart

Institute on Aging

Appendix A-Services to be Provided

Appendix B-Program Budget

Appendix F-Site Chart

Self-Help for the Elderly

Appendix A-Services to be Provided

Appendix B-Program Budget

Appendix F-Site Chart

SteppingStone

Appendix A-Services to be Provided

Appendix B-Program Budget

Appendix F-Site Chart

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
 Catholic Charities of San Francisco
 July 1, 2021 – June 30, 2024
 Alzheimer’s Day Care Resource Center (ADCRC)

I. Purpose

The purpose of this grant is to assist individuals with Alzheimer’s disease and other dementia related disorders to remain in the community by providing them with opportunities for enhanced care and meaningful social, physical, and emotional engagement at an Adult Day Program or Adult Day Health Care. The Alzheimer’s Day Care Resource Center also provides respite care for families and caregivers, supportive counseling and education to families, caregivers, and the community at large, and trainings and volunteer opportunities to support those with Alzheimer’s disease and other dementia related disorders.

II. Definitions

ADCRC	Alzheimer's Day Care Resource Center; A community-based program that serves persons with Alzheimer’s Disease or other dementia related disorders, particularly those in the middle to late stages, whose care needs and behavior make it difficult for them to participate in other day programs. The operation of an ADCRC takes place within the framework of a licensed Adult Day Program or Adult Day Health Care.
ADHC	Adult Day Health Care; A licensed community-based day health program that provides services to older adults and adults with chronic medical, cognitive, or mental health conditions and/or disabilities that are at risk of needing institutional care.
ADP	Adult Day Program; A community-based program that provides non-medical care to persons 18 years of age or older in need of personal care services, supervision, assistance with sustaining the activities of daily living, or the protection of the individual on less than 24-hour basis. The State Department of Social Services (DSS) licenses the ADP center as a community care facility.
ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
CA GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.

CARBON	Contracts Administration, Reporting, and Billing Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions 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.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) 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 individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Catholic Charities of San Francisco
HSA	Human Services Agency of the City and County of San Francisco
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, gender queer, and gender non-binary.
Low-income	Having income at or below 300% of the federal poverty line defined by the Federal Bureau of 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, and not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan, Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an

	American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management
Older Adult	Person who is 60 years or older, used interchangeably with senior.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- A. Low-income
- B. Non- or limited English speaking
- C. Minority
- D. Frail
- E. Member of LGBTQ+ community

IV. Eligibility for ADCRC Services

A resident of San Francisco who is 18 years and older, and living with a disability, or has functional needs or difficulties sustaining Activities of Daily Living (ADLs), and who will benefit from assistance or supervision in maintaining independence.

To be eligible for ADCRC services, individuals must be deemed to have Alzheimer's disease or other dementia related disorders, particularly in the middle to late stages, and their care needs and behavior may make it difficult to participate in community programs or other social settings. Stages of Alzheimer's are described at: <https://alz.org/alzheimers-dementia/stages>.

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an Alzheimer's Day Care Resource Center within the framework of a licensed Adult Day Program or Adult Day Health Care to provide the services necessary to meet the needs of participants with Alzheimer's Disease or other dementia related disorders. Grantee will develop a program and maintain a physical environment suitable to caring for participants with conditions associated with dementia and provide respite for the participant's primary caregivers. Services are comprised of four categories: 1) day program services, 2) caregiver support, 3) volunteer services, and 4) education. Program hours are usually Monday through Friday, with an optimum staffing ratio of one staff to five participants. The ADCRC will provide participants with enriching activities and socialization opportunities, and encourage participant engagement. Grantee will develop, organize, and provide training to professionals and other persons caring for the participants. Program staff will disseminate information to the public regarding Alzheimer's disease and related dementias, and provide supportive counseling and resources to families, caregivers, and the general public. Trained volunteers will be part of the care teams and will be included in ongoing ADCRC in-service trainings. In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADCRC services within the fiscal year.

UNIT: One (1) unduplicated consumer

ADCRC Program Hours – Provision of ADCRC services that include specialized dementia-specific care for participants in a supervised, protective, congregate setting during some portion of a 24-hour day. Services typically include enhanced socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling in an environment designed to accommodate participants in the middle to late stages of Alzheimer's Disease or other dementia related disorders. The total units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

Caregiver Support – Provision of information on Alzheimer's Disease or other dementia related disorders and referrals to support groups and/or other provider resources and entities. Supportive counseling assistance for individuals to enable them to resolve problems and make informed decisions about memory care options. Support may include home visits to provide advice and assistance, and emotional support by phone or in-person.

UNIT: One (1) contact

Education and Training Sessions – Provision of education and training to staff, volunteers, caregivers, and the community at large on topics related to Alzheimer’s Disease or other dementia related disorders. Sessions will be conducted by experienced staff, subject matter experts, and/or medical/clinical professionals. Training topics will include care issues surrounding Alzheimer’s Disease or other dementia related disorders, common behaviors associated with dementia, communication methods, and how to work with individuals with dementia. Sessions may also include workshops on caregiving, team building, and client-centered approaches to care and health related issues.

UNIT: One (1) session

Volunteers – A unique individual trained and enlisted as a volunteer to help provide ADCRC services within the fiscal year.

UNIT: One (1) volunteer

Volunteer Time – Opportunities provided to trained volunteers to help with the provision of ADCRC services within the fiscal year. The total units of service to be reported is the cumulative number of hours of service provided by individual volunteers for the ADCRC.

UNIT: One (1) hour

VIII. Service Objectives

On an annual basis:

- A. Grantee will provide ADCRC services to 32unduplicated consumers.
- B. Grantee will provide 14,500 ADCRC Program hours to consumers.
- C. Grantee will provide a minimum of 12 support group sessions for caregivers of individuals with Alzheimer’s Disease or other dementia related disorders.
- D. Grantee will provide 150caregiver support contacts to families and caregivers of participants with Alzheimer’s Disease or other dementia related disorders.
- E. Grantee will provide at least 6 education and training sessions to staff and volunteers through experienced staff or outside trainers and/or professionals regarding Alzheimer’s Disease or other dementia related disorders, dementia related behaviors, effective communication methods, etc.

F. Grantee will train and enlist at least **40** volunteers to help with the provision of ADCRC services.

G. Grantee will provide **300** volunteer hours as opportunities for volunteers to provide ADCRC services that they are trained for.

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey administered by the Grantee and other data tracking systems utilized by the Grantee.

A. Consumers who have been in the program for 6 months or more are able to live in the community instead of being institutionalized. Target: 85%

B. Consumers are socially engaged as evidenced by their participation in ADCRC services that is appropriate to their stage of Alzheimer's Disease or other dementia related disorders. Target: 85%

C. Caregivers are more aware of services for Alzheimer's Disease or other dementia related disorders that are available to them and their care recipients as a result of participation in ADCRC services. Target: 85%

D. Caregivers are better able to provide care to their care recipients living with Alzheimer's Disease or other dementia related disorders as a result of the education and trainings they receive from the ADCRC. Target: 85%

E. Caregivers are better able to attend to their own personal health and well-being due to the caregiver support they receive from the ADCRC. Target: 85%

F. Caregivers rate the quality of respite services received from the ADCRC as good or excellent. Target: 85%

X. Reporting and Other Requirements

A. Grantee must enter consumer data and units of service into CA GetCare – Community Services module by the 5th working day of the month for the preceding month.

B. Monthly, quarterly, and/or annual program reports must be submitted in the CARBON system as required by HSA/DAS/OCP. All reports are due by the 15th of the month for the preceding reporting period.

C. Grantee must submit response rates and aggregate data from annual consumer survey to HSA/DAS/OCP by July 15th each year for the preceding grant year.

- D. Grantee must submit a Fiscal Closeout Report in the CARBON system by July 31st each year for the preceding grant year.
- E. Grantee must submit ad hoc reports as requested by HSA/DAS/OCF.
- F. Grantee must submit a bi-annual summary report of SOGI data collected as required by state and local law. The report must be submitted in the CARBON system by January 10th (for data collected between July 1st and December 31st) and July 10th (for data collected between January 1st and June 30th) for each grant year.
- G. Grantee must 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.
- H. Apart from reports requested to be sent via email to the Program Analyst/Manager and/or Contract Manager, all other reports and communications should be sent to the following:

Tahir Shaikh Contracts Manager Tahir.Shaikh@sfgov.org P.O. Box 7988 San Francisco, CA 94120	Fanny Lapitan Program Manager Fanny.Lapitan@sfgov.org P.O. Box 7988 San Francisco, CA 94120
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XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards and requirements, including client eligibility, back up documentation for units of service and all reporting, progress towards service and outcome objectives, handling and documentation of participant records, and reporting on CA GetCare. Review of agency and organization standards, including organizational chart, qualifications of program staff, and evidence of staff training for Elder Abuse Reporting and Security Awareness Training. Review of program operations, including policies and procedures for all aspects of the program, written project income policies if applicable, grievance procedures, and Quality Assurance plan.
- 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, MOUs, current board roster and selected board minutes for compliance with Sunshine Ordinance.

	A	B	C	D	F
1	Appendix B, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name		Term		
6	Catholic Charities		7/1/21-6/30/24		
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: Alzheimers Day Care Resource Center				
10	Budget Reference Page No.(s)				Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	Expenditures				
13	Salaries & Benefits	\$89,890	\$89,890	\$89,890	\$269,670
14	Operating Expenses	\$23,154	\$23,154	\$23,154	\$69,462
15	Subtotal	\$113,044	\$113,044	\$113,044	\$339,132
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$16,956	\$16,956	\$16,956	\$50,868
18	Subcontractor/Capital Expenditures				
19	Total Expenditures	\$130,000	\$130,000	\$130,000	\$390,000
20	HSA Revenues				
21	General Fund	\$130,000	\$130,000	\$130,000	\$390,000
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$130,000	\$130,000	\$130,000	\$390,000
30	Other Revenues				
31					
32	Foundations, Grants, Fees, & Donations	\$96,680	\$96,680	\$96,680	\$290,040
33					
34					
35					
36	Total Revenues	\$226,680	\$226,680	\$226,680	\$680,040
37	Full Time Equivalent (FTE)				
39	Prepared by: Patty Clement/Delilah Perez Telephone No.: 415-452-3504 / 415-972-1208				
40	HSA-CO Review Signature: _____				
41	HSA #1				6/20/2018

	A	B	C	D	E	F	G	H	J
1	Appendix B, Page 2								
2									
3	Catholic Charities								
4	Program: Alzheimers Day Care Resource Center								
5									
6									
7	Salaries & Benefits Detail								
8									
9									
10									
11		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Director of Client Services	\$133,980	1.00	10%	0.10	\$13,398	\$13,398	\$13,398	\$40,194
14	Program Director	\$79,215	1.00	17%	0.17	\$13,467	\$13,467	\$13,467	\$40,401
15	Activity Coordinator	\$50,028	1.00	40%	0.40	\$20,011	\$20,011	\$20,011	\$60,033
16	Prog/Activity Asst- #1	\$39,895	0.80	45%	0.36	\$14,362	\$14,362	\$14,362	\$43,086
17	Food Service Coor	\$37,898	0.88	20%	0.18	\$6,670	\$6,670	\$6,670	\$20,010
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28	TOTALS	\$341,016	4.68	132%	1.21	\$67,908	\$67,908	\$67,908	\$203,724
29									
30	FRINGE BENEFIT RATE	32%							
31	EMPLOYEE FRINGE BENEFITS	\$110,387				\$21,982	\$21,982	\$21,982	\$65,946
32									
33									
34	TOTAL SALARIES & BENEFITS	\$451,403				\$89,890	\$89,890	\$89,890	\$269,670
35	HSA #2								6/20/2018

	A	B	C	D	E	F	G	H	I	N
1	Appendix B, Page 3									
2										
3	Catholic Charities									
4	Program: Alzheimers Day Care Resource Center									
5										
6										
7	Operating Expense Detail									
8										
9										
10										
11	TOTAL									
12	<u>Expenditure Category</u>			TERM	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>	<u>7/1/21-6/30/24</u>		
13	Rental of Property				\$18,300	\$18,300	\$18,300	\$54,900		
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$3,185	\$3,185	\$3,185	\$9,555		
15	Office Supplies, Postage									
16	Building Maintenance Supplies and Repair									
17	Printing and Reproduction									
18	Insurance				\$1,669	\$1,669	\$1,669	\$5,007		
19	Staff Training									
20	Staff Travel-(Local & Out of Town)									
21	Rental of Equipment									
22										
23	CONSULTANTS									
24										
25										
26										
27	OTHER									
28										
29										
30										
31	TOTAL OPERATING EXPENSE				\$ 23,154	\$ 23,154	\$ 23,154	\$69,462		
32										
33	HSA #3									6/20/2018

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: Catholic Charities

FISCAL YEAR: **2021-2022**

CONTRACT: Alzheimer's Day Care Resource Center

DIRECTOR: Patty Clement

PHONE NO.: 415-452-3504

SITES: Name of Site	Catholic Charities Adult Day Services – San Francisco				
Address and Zip	50 Broad Street San Francisco, CA 94112				
Phone Number	415-452-3500				
Fax Number	415-452-3505				
Neighborhood	OMI / City of San Francisco				
Muni Line #s	Muni M & Route 54				
Person in Charge Site Manager	Patty Clement Carmen Santoni				
Programs Offered at Site	ADC Scheduled activities				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8:00 AM – 5:00 PM				
Hours of <u>scheduled</u> programming	9:30 AM – 3:00 PM				
Total number of service days in FY	246				
Days closed	All Holidays listed to the right	All Holidays listed to the right.	New Years Day, Martin Luther King Day, President's Day, Good Friday, Memorial Day, Juneteenth,	Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve, Christmas Day, 1-2 Training Days	
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Institute on Aging

July 1, 2021 – June 30, 2024

Alzheimer's Day Care Resource Center (ADCRC)

I. Purpose

The purpose of this grant is to assist individuals with Alzheimer's disease and other dementia related disorders to remain in the community by providing them with opportunities for enhanced care and meaningful social, physical, and emotional engagement at an Adult Day Program or Adult Day Health Care. The Alzheimer's Day Care Resource Center also provides respite care for families and caregivers, supportive counseling and education to families, caregivers, and the community at large, and trainings and volunteer opportunities to support those with Alzheimer's disease and other dementia related disorders.

II. Definitions

ADCRC	Alzheimer's Day Care Resource Center; A community-based program that serves persons with Alzheimer's Disease or other dementia related disorders, particularly those in the middle to late stages, whose care needs and behavior make it difficult for them to participate in other day programs. The operation of an ADCRC takes place within the framework of a licensed Adult Day Program or Adult Day Health Care.
ADHC	Adult Day Health Care; A licensed community-based day health program that provides services to older adults and adults with chronic medical, cognitive, or mental health conditions and/or disabilities that are at risk of needing institutional care.
ADP	Adult Day Program; A community-based program that provides non-medical care to persons 18 years of age or older in need of personal care services, supervision, assistance with sustaining the activities of daily living, or the protection of the individual on less than 24-hour basis. The State Department of Social Services (DSS) licenses the ADP center as a community care facility.
ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
CA GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.

CARBON	Contracts Administration, Reporting, and Billing Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions 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.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) 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 individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Institute on Aging – Irene Swindell’s
HSA	Human Services Agency of the City and County of San Francisco
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, gender queer, and gender non-binary.
Low-income	Having income at or below 300% of the federal poverty line defined by the Federal Bureau of 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, and not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan, Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an

	American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management
Older Adult	Person who is 60 years or older, used interchangeably with senior.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- A. Low-income
- B. Non- or limited English speaking
- C. Minority
- D. Frail
- E. Member of LGBTQ+ community

IV. Eligibility for ADCRC Services

A resident of San Francisco who is 18 years and older, and living with a disability, or has functional needs or difficulties sustaining Activities of Daily Living (ADLs), and who will benefit from assistance or supervision in maintaining independence.

To be eligible for ADCRC services, individuals must be deemed to have Alzheimer's disease or other dementia related disorders, particularly in the middle to late stages, and their care needs and behavior may make it difficult to participate in community programs or other social settings. Stages of Alzheimer's are described at: <https://alz.org/alzheimers-dementia/stages>.

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an Alzheimer's Day Care Resource Center within the framework of a licensed Adult Day Program or Adult Day Health Care to provide the services necessary to meet the needs of participants with Alzheimer's Disease or other dementia related disorders. Grantee will develop a program and maintain a physical environment suitable to caring for participants with conditions associated with dementia and provide respite for the participant's primary caregivers. Services are comprised of four categories: 1) day program services, 2) caregiver support, 3) volunteer services, and 4) education. Program hours are usually Monday through Friday, with an optimum staffing ratio of one staff to five participants. The ADCRC will provide participants with enriching activities and socialization opportunities, and encourage participant engagement. Grantee will develop, organize, and provide training to professionals and other persons caring for the participants. Program staff will disseminate information to the public regarding Alzheimer's disease and related dementias, and provide supportive counseling and resources to families, caregivers, and the general public. Trained volunteers will be part of the care teams and will be included in ongoing ADCRC in-service trainings. In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADCRC services within the fiscal year.

UNIT: One (1) unduplicated consumer

ADCRC Program Hours – Provision of ADCRC services that include specialized dementia-specific care for participants in a supervised, protective, congregate setting during some portion of a 24-hour day. Services typically include enhanced socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling in an environment designed to accommodate participants in the middle to late stages of Alzheimer's Disease or other dementia related disorders. The total units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

Caregiver Support – Provision of information on Alzheimer’s Disease or other dementia related disorders and referrals to support groups and/or other provider resources and entities. Supportive counseling assistance for individuals to enable them to resolve problems and make informed decisions about memory care options. Support may include home visits to provide advice and assistance, and emotional support by phone or in-person.

UNIT: One (1) contact

Education and Training Sessions – Provision of education and training to staff, volunteers, caregivers, and the community at large on topics related to Alzheimer’s Disease or other dementia related disorders. Sessions will be conducted by experienced staff, subject matter experts, and/or medical/clinical professionals. Training topics will include care issues surrounding Alzheimer’s Disease or other dementia related disorders, common behaviors associated with dementia, communication methods, and how to work with individuals with dementia. Sessions may also include workshops on caregiving, team building, and client-centered approaches to care and health related issues.

UNIT: One (1) session

Volunteers – A unique individual trained and enlisted as a volunteer to help provide ADCRC services within the fiscal year.

UNIT: One (1) volunteer

Volunteer Time – Opportunities provided to trained volunteers to help with the provision of ADCRC services within the fiscal year. The total units of service to be reported is the cumulative number of hours of service provided by individual volunteers for the ADCRC.

UNIT: One (1) hour

VIII. Service Objectives

On an annual basis:

- A. Grantee will provide ADCRC services to 33 unduplicated consumers.
- B. Grantee will provide 12,350 ADCRC Program hours to consumers.
- C. Grantee will provide a minimum of 12 support group sessions for caregivers of individuals with Alzheimer’s Disease or other dementia related disorders.
- D. Grantee will provide 93 caregiver support contacts to families and caregivers of participants with Alzheimer’s Disease or other dementia related disorders.

- E. Grantee will provide at least **6** education and training sessions to staff and volunteers through experienced staff or outside trainers and/or professionals regarding Alzheimer's Disease or other dementia related disorders, dementia related behaviors, effective communication methods, etc.
- F. Grantee will train and enlist at least **50** volunteers to help with the provision of ADCRC services.
- G. Grantee will provide **700** volunteer hours as opportunities for volunteers to provide ADCRC services that they are trained for.

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey administered by the Grantee and other data tracking systems utilized by the Grantee.

- A. Consumers who have been in the program for 6 months or more are able to live in the community instead of being institutionalized. Target: 85%
- B. Consumers are socially engaged as evidenced by their participation in ADCRC services that is appropriate to their stage of Alzheimer's Disease or other dementia related disorders. Target: 85%
- C. Caregivers are more aware of services for Alzheimer's Disease or other dementia related disorders that are available to them and their care recipients as a result of participation in ADCRC services. Target: 85%
- D. Caregivers are better able to provide care to their care recipients living with Alzheimer's Disease or other dementia related disorders as a result of the education and trainings they receive from the ADCRC. Target: 85%
- E. Caregivers are better able to attend to their own personal health and well-being due to the caregiver support they receive from the ADCRC. Target: 85%
- F. Caregivers rate the quality of respite services received from the ADCRC as good or excellent. Target: 85%

X. Reporting and Other Requirements

- A. Grantee must enter consumer data and units of service into CA GetCare – Community Services module by the 5th working day of the month for the preceding month.

- B. Monthly, quarterly, and/or annual program reports must be submitted in the CARBON system as required by HSA/DAS/OCP. All reports are due by the 15th of the month for the preceding reporting period.
- C. Grantee must submit response rates and aggregate data from annual consumer survey to HSA/DAS/OCP by July 15th each year for the preceding grant year.
- D. Grantee must submit a Fiscal Closeout Report in the CARBON system by July 31st each year for the preceding grant year.
- E. Grantee must submit ad hoc reports as requested by HSA/DAS/OCP.
- F. Grantee must submit a bi-annual summary report of SOGI data collected as required by state and local law. The report must be submitted in the CARBON system by January 10th (for data collected between July 1st and December 31st) and July 10th (for data collected between January 1st and June 30th) for each grant year.
- G. Grantee must 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.
- H. Apart from reports requested to be sent via email to the Program Analyst/Manager and/or Contract Manager, all other reports and communications should be sent to the following:

Tahir Shaikh
Contracts Manager
Tahir.Shaikh@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

Fanny Lapitan
Program Manager
Fanny.Lapitan@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards and requirements, including client eligibility, back up documentation for units of service and all reporting, progress towards service and outcome objectives, handling and documentation of participant records, and reporting on CA GetCare. Review of agency and organization standards, including organizational chart, qualifications of program staff, and evidence of staff training for Elder Abuse Reporting and Security Awareness Training. Review of program operations, including policies and procedures for all aspects of the program, written project income policies if applicable, grievance procedures, and Quality Assurance plan.
- 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, MOUs, current board roster and selected board minutes for compliance with Sunshine Ordinance.

	A	B	C	D	E
1	Appendix B, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4					
5	Name		Term		
6	Institute on Aging		7/1/21-6/30/24		
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: Alzheimer Day Care Resource Center (ADCRC)				
10	Budget Reference Page No.(s)				Total
11	Program Term				7/1/21-6/30/24
12	Expenditures				
13	Salaries & Benefits	\$89,827	\$89,827	\$89,827	\$269,481
14	Operating Expenses	\$10,173	\$10,173	\$10,173	\$30,519
15	Subtotal	\$100,000	\$100,000	\$100,000	\$300,000
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$15,000	\$15,000	\$15,000	\$45,000
18	Subcontractor/Capital Expenditures				
19	Total Expenditures	\$115,000	\$115,000	\$115,000	\$345,000
20	HSA Revenues				
21	General Fund	\$115,000	\$115,000	\$115,000	\$345,000
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$115,000	\$115,000	\$115,000	\$345,000
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$115,000	\$115,000	\$115,000	\$345,000
37	Full Time Equivalent (FTE)				
39	Prepared by:				
40	HSA-CO Review Signature: _____				
41	HSA #1 6/20/2018				

	A	B	C	D	E	F	G	H	I
1									
2									
3	Institute on Aging								
4	Program: Alzheimer Day Care Resource Center (ADCRC)								
5									
6									
7	Salaries & Benefits Detail								
8									
9									
10									
11						7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
		Agency Totals		HSA Program		DAS	DAS	DAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE								
13	Program Director	\$87,724	1.00	50%	0.50	\$43,862	\$43,862	\$43,862	\$131,586
14	Client Services Manager	\$70,000	1.00	40%	0.40	\$28,000	\$28,000	\$28,000	\$84,000
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30	TOTALS	\$157,724	2.00	90%	0.90	\$71,862	\$71,862	\$71,862	\$215,586
31									
32	FRINGE BENEFIT RATE	25%							
33	EMPLOYEE FRINGE BENEFITS	\$39,431				\$17,965	\$17,965	\$17,965	\$53,895
34									
35									
36	TOTAL SALARIES & BENEFITS	\$197,155				\$89,827	\$89,827	\$89,827	\$269,481
37	HSA #2								6/20/2018

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	Institute on Aging												
4	Program: Alzheimer Day Care Resource Center (ADCRC)												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	<u>Expenditure Category</u>		TERM	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>							TOTAL 7/1/21-6/30/24
13	Food Supplies			\$6,000	\$6,000	\$6,000							\$18,000
14	Client Transportation			\$2,423	\$2,423	\$2,423							\$7,269
15	Office Supplies			\$500	\$500	\$500							\$1,500
16	Insurance			\$350	\$350	\$350							\$1,050
17	Licenses & Fees			\$900	\$900	\$900							\$2,700
18													
19													
20													
21													
22													
23	CONSULTANTS												
24													
25													
26													
27	OTHER												
28													
29													
30													
31	TOTAL OPERATING EXPENSE			\$10,173	\$10,173	\$10,173							\$30,519
32													
33	HSA #3												6/20/2018

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: Institute on Aging

FISCAL YEAR: **2021-2022**

CONTRACT: ADCRC

DIRECTOR: Alison Moritz

PHONE NO.: 415-728-9260

SITES: Name of Site	Irene Swindell's Adult Day Program				
Address and Zip	386 Moraga Avenue San Francisco, CA 94129				
Phone Number	415-728-9260				
Fax Number	Presidio				
Neighborhood	On—site Director: Alison Moritz				
Muni Line #s					
Person in Charge	Administrator: Aaron McPherson				
Site Manager					
Programs Offered at Site	ADP & ADCRC				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat (once monthly) <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	830 AM- 500 PM				
Hours of <u>scheduled</u> programming	900 AM – 3 PM				
Total number of service days in FY	273				
Days closed	New Year's Day Martin Luther King Day President's Day Memorial Day Independence Day Labor Day Thanksgiving Day Christmas Day				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
 Self-Help for the Elderly
 July 1, 2021 – June 30, 2024
 Alzheimer’s Day Care Resource Center (ADCRC)

I. Purpose

The purpose of this grant is to assist individuals with Alzheimer’s disease and other dementia related disorders to remain in the community by providing them with opportunities for enhanced care and meaningful social, physical, and emotional engagement at an Adult Day Program or Adult Day Health Care. The Alzheimer’s Day Care Resource Center also provides respite care for families and caregivers, supportive counseling and education to families, caregivers, and the community at large, and trainings and volunteer opportunities to support those with Alzheimer’s disease and other dementia related disorders.

II. Definitions

ADCRC	Alzheimer's Day Care Resource Center; A community-based program that serves persons with Alzheimer’s Disease or other dementia related disorders, particularly those in the middle to late stages, whose care needs and behavior make it difficult for them to participate in other day programs. The operation of an ADCRC takes place within the framework of a licensed Adult Day Program or Adult Day Health Care.
ADHC	Adult Day Health Care; A licensed community-based day health program that provides services to older adults and adults with chronic medical, cognitive, or mental health conditions and/or disabilities that are at risk of needing institutional care.
ADP	Adult Day Program; A community-based program that provides non-medical care to persons 18 years of age or older in need of personal care services, supervision, assistance with sustaining the activities of daily living, or the protection of the individual on less than 24-hour basis. The State Department of Social Services (DSS) licenses the ADP center as a community care facility.
ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
CA GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.

CARBON	Contracts Administration, Reporting, and Billing Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions 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.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) 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 individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Self-Help for the Elderly Adult Day Services
HSA	Human Services Agency of the City and County of San Francisco
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, gender queer, and gender non-binary.
Low-income	Having income at or below 300% of the federal poverty line defined by the Federal Bureau of 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, and not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan, Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an

	American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management
Older Adult	Person who is 60 years or older, used interchangeably with senior.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- A. Low-income
- B. Non- or limited English speaking
- C. Minority
- D. Frail
- E. Member of LGBTQ+ community

IV. Eligibility for ADCRC Services

A resident of San Francisco who is 18 years and older, and living with a disability, or has functional needs or difficulties sustaining Activities of Daily Living (ADLs), and who will benefit from assistance or supervision in maintaining independence.

To be eligible for ADCRC services, individuals must be deemed to have Alzheimer's disease or other dementia related disorders, particularly in the middle to late stages, and their care needs and behavior may make it difficult to participate in community programs or other social settings. Stages of Alzheimer's are described at: <https://alz.org/alzheimers-dementia/stages>.

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an Alzheimer's Day Care Resource Center within the framework of a licensed Adult Day Program or Adult Day Health Care to provide the services necessary to meet the needs of participants with Alzheimer's Disease or other dementia related disorders. Grantee will develop a program and maintain a physical environment suitable to caring for participants with conditions associated with dementia and provide respite for the participant's primary caregivers. Services are comprised of four categories: 1) day program services, 2) caregiver support, 3) volunteer services, and 4) education. Program hours are usually Monday through Friday, with an optimum staffing ratio of one staff to five participants. The ADCRC will provide participants with enriching activities and socialization opportunities, and encourage participant engagement. Grantee will develop, organize, and provide training to professionals and other persons caring for the participants. Program staff will disseminate information to the public regarding Alzheimer's disease and related dementias, and provide supportive counseling and resources to families, caregivers, and the general public. Trained volunteers will be part of the care teams and will be included in ongoing ADCRC in-service trainings. In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADCRC services within the fiscal year.

UNIT: One (1) unduplicated consumer

ADCRC Program Hours – Provision of ADCRC services that include specialized dementia-specific care for participants in a supervised, protective, congregate setting during some portion of a 24-hour day. Services typically include enhanced socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling in an environment designed to accommodate participants in the middle to late stages of Alzheimer's Disease or other dementia related disorders. The total units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

Caregiver Support – Provision of information on Alzheimer's Disease or other dementia related disorders and referrals to support groups and/or other provider resources and entities. Supportive counseling assistance for individuals to enable them to resolve problems and make informed decisions about memory care options. Support may include home visits to provide advice and assistance, and emotional support by phone or in-person.

UNIT: One (1) contact

Education and Training Sessions – Provision of education and training to staff, volunteers, caregivers, and the community at large on topics related to Alzheimer’s Disease or other dementia related disorders. Sessions will be conducted by experienced staff, subject matter experts, and/or medical/clinical professionals. Training topics will include care issues surrounding Alzheimer’s Disease or other dementia related disorders, common behaviors associated with dementia, communication methods, and how to work with individuals with dementia. Sessions may also include workshops on caregiving, team building, and client-centered approaches to care and health related issues.

UNIT: One (1) session

Volunteers – A unique individual trained and enlisted as a volunteer to help provide ADCRC services within the fiscal year.

UNIT: One (1) volunteer

Volunteer Time – Opportunities provided to trained volunteers to help with the provision of ADCRC services within the fiscal year. The total units of service to be reported is the cumulative number of hours of service provided by individual volunteers for the ADCRC.

UNIT: One (1) hour

VIII. Service Objectives

On an annual basis:

- A. Grantee will provide ADCRC services to **30** unduplicated consumers.
- B. Grantee will provide **15,000** ADCRC Program hours to consumers.
- C. Grantee will provide a minimum of **12** support group sessions for caregivers of individuals with Alzheimer’s Disease or other dementia related disorders.
- D. Grantee will provide **30** contacts for caregiver support to families and caregivers of participants with Alzheimer’s Disease or other dementia related disorders.
- E. Grantee will provide at least **8** education and training sessions to staff and volunteers through experienced staff or outside trainers and/or professionals regarding Alzheimer’s Disease or other dementia related disorders, dementia related behaviors, effective communication methods, etc.

F. Grantee will train and enlist at least **100** volunteers to help with the provision of ADCRC services.

G. Grantee will provide **1000** volunteer hours as opportunities for volunteers to provide ADCRC services that they are trained for.

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey administered by the Grantee and other data tracking systems utilized by the Grantee.

A. Consumers who have been in the program for 6 months or more are able to live in the community instead of being institutionalized. Target: 85%

B. Consumers are socially engaged as evidenced by their participation in ADCRC services that is appropriate to their stage of Alzheimer's Disease or other dementia related disorders. Target: 85%

C. Caregivers are more aware of services for Alzheimer's Disease or other dementia related disorders that are available to them and their care recipients as a result of participation in ADCRC services. Target: 85%

D. Caregivers are better able to provide care to their care recipients living with Alzheimer's Disease or other dementia related disorders as a result of the education and trainings they receive from the ADCRC. Target: 85%

E. Caregivers are better able to attend to their own personal health and well-being due to the caregiver support they receive from the ADCRC. Target: 85%

F. Caregivers rate the quality of respite services received from the ADCRC as good or excellent. Target: 85%

X. Reporting and Other Requirements

A. Grantee must enter consumer data and units of service into CA GetCare – Community Services module by the 5th working day of the month for the preceding month.

B. Monthly, quarterly, and/or annual program reports must be submitted in the CARBON system as required by HSA/DAS/OCP. All reports are due by the 15th of the month for the preceding reporting period.

C. Grantee must submit response rates and aggregate data from annual consumer survey to HSA/DAS/OCP by July 15th each year for the preceding grant year.

- D. Grantee must submit a Fiscal Closeout Report in the CARBON system by July 31st each year for the preceding grant year.
- E. Grantee must submit ad hoc reports as requested by HSA/DAS/OCP.
- F. Grantee must submit a bi-annual summary report of SOGI data collected as required by state and local law. The report must be submitted in the CARBON system by January 10th (for data collected between July 1st and December 31st) and July 10th (for data collected between January 1st and June 30th) for each grant year.
- G. Grantee must 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.
- H. Apart from reports requested to be sent via email to the Program Analyst/Manager and/or Contract Manager, all other reports and communications should be sent to the following:

Tahir Shaikh
Contracts Manager
Tahir.Shaikh@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

Fanny Lapitan
Program Manager
Fanny.Lapitan@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards and requirements, including client eligibility, back up documentation for units of service and all reporting, progress towards service and outcome objectives, handling and documentation of participant records, and reporting on CA GetCare. Review of agency and organization standards, including organizational chart, qualifications of program staff, and evidence of staff training for Elder Abuse Reporting and Security Awareness Training. Review of program operations, including policies and procedures for all aspects of the program, written project income policies if applicable, grievance procedures, and Quality Assurance plan.
- 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, MOUs, current board roster and selected board minutes for compliance with Sunshine Ordinance.

	A	B	C	D	F
1	Appendix B, Page 1				
2					
3	HUMAN SERVICES AGENCY BUDGET SUMMARY				
4	BY PROGRAM				
5	Name		Term		
6	SELF-HELP FOR THE ELDERLY		7/1/21-6/30/24		
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: ADCRC-ADULT DAY CARE RESOURCE CENTER				
10	Budget Reference Page No.(s)				Total
11	Program Term				7/1/21-6/30/24
12	Expenditures				
13	Salaries & Benefits	\$100,000	\$100,000	\$100,000	\$300,000
14	Operating Expenses	\$0	\$0	\$0	\$0
15	Subtotal	\$100,000	\$100,000	\$100,000	\$300,000
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$15,000	\$15,000	\$15,000	\$45,000
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0
19	Total Expenditures	\$115,000	\$115,000	\$115,000	\$345,000
20	HSA Revenues				
21	General Fund	\$115,000	\$115,000	\$115,000	\$345,000
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$115,000	\$115,000	\$115,000	\$345,000
30	Other Revenues				
31					
32	In-Kind Volunteers				
33					
34					
35					
36	Total Revenues	\$115,000	\$115,000	\$115,000	\$345,000
37	Full Time Equivalent (FTE)				
39	Prepared by: Leny Nair	Telephone No.:	415-677-7682	6/4/2021	
40	HSA-CO Review Signature: _____				
41	HSA #1 6/20/2018				

	A	B	C	D	E	F	G	H	J
1	Appendix B, Page 2								
2									
3	SELF-HELP FOR THE ELDERLY								
4	Program: ADCRC-ADULT DAY CARE RESOURCE CENTER								
5									
6									
7	Salaries & Benefits Detail								
8									
9									
10									
11		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Program Aide 1	\$35,464	0.75	100%	0.75	\$26,598	\$26,598	\$26,598	\$79,794
14	Program Aide 1	\$35,464	0.75	100%	0.75	\$26,598	\$26,598	\$26,598	\$79,794
15	Care Coordinator	\$47,840	1.00	52%	0.52	\$24,929	\$24,929	\$24,929	\$74,787
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30	TOTALS	\$118,768	2.50	252%	2.02	\$78,125	\$78,125	\$78,125	\$234,375
31									
32	FRINGE BENEFIT RATE	28%							
33	EMPLOYEE FRINGE BENEFITS	\$33,255				\$21,875	\$21,875	\$21,875	\$65,625
34									
35									
36	TOTAL SALARIES & BENEFITS	\$152,023				\$100,000	\$100,000	\$100,000	\$300,000
37	HSA #2								6/20/2018

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: Self Help for the Elderly

FISCAL YEAR: **2021-2022**

CONTRACT: Alzheimer's Day Care Resource Center

DIRECTOR: Ziyang Kelvin Yu

PHONE NO.: 415-677-7556

SITES:	Self Help for the Elderly Adult Day Services				
Name of Site					
Address and Zip	408 22 nd Avenue San Francisco, CA 94121				
Phone Number	415-677-7556				
Fax Number	415-666-1899				
Neighborhood	Richmond District				
Muni Line #s	38; 38R; 1; 2				
Person in Charge	Ziyang Kelvin Yu				
Site Manager					
Programs Offered at Site	ADHC, ADP, ADCRC				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8:30AM – 5:00PM				
Hours of <u>scheduled</u> programming	9:15AM – 3:00PM				
Total number of service days in FY	249				
Days closed	11 Days				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE
 North and South of Market Adult Day Health Corporation dba SteppingStone
 July 1, 2021 – June 30, 2024
 Alzheimer’s Day Care Resource Center (ADCRC)

I. Purpose

The purpose of this grant is to assist individuals with Alzheimer’s disease and other dementia related disorders to remain in the community by providing them with opportunities for enhanced care and meaningful social, physical, and emotional engagement at an Adult Day Program or Adult Day Health Care. The Alzheimer’s Day Care Resource Center also provides respite care for families and caregivers, supportive counseling and education to families, caregivers, and the community at large, and trainings and volunteer opportunities to support those with Alzheimer’s disease and other dementia related disorders.

II. Definitions

ADCRC	Alzheimer's Day Care Resource Center; A community-based program that serves persons with Alzheimer’s Disease or other dementia related disorders, particularly those in the middle to late stages, whose care needs and behavior make it difficult for them to participate in other day programs. The operation of an ADCRC takes place within the framework of a licensed Adult Day Program or Adult Day Health Care.
ADHC	Adult Day Health Care; A licensed community-based day health program that provides services to older adults and adults with chronic medical, cognitive, or mental health conditions and/or disabilities that are at risk of needing institutional care.
ADP	Adult Day Program; A community-based program that provides non-medical care to persons 18 years of age or older in need of personal care services, supervision, assistance with sustaining the activities of daily living, or the protection of the individual on less than 24-hour basis. The State Department of Social Services (DSS) licenses the ADP center as a community care facility.
ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
CA GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.

CARBON	Contracts Administration, Reporting, and Billing Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions 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.
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) 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 individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	North and South of Market Adult Day Health Corporation dba SteppingStone
HSA	Human Services Agency of the City and County of San Francisco
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, gender queer, and gender non-binary.
Low-income	Having income at or below 300% of the federal poverty line defined by the Federal Bureau of 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, and not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan, Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific

	including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management
Older Adult	Person who is 60 years or older, used interchangeably with senior.
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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

Services must target those older adults and adults with disabilities (aged 18-59) who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need. In particular:

- A. Low-income
- B. Non- or limited English speaking
- C. Minority
- D. Frail
- E. Member of LGBTQ+ community

IV. Eligibility for ADCRC Services

A resident of San Francisco who is 18 years and older, and living with a disability, or has functional needs or difficulties sustaining Activities of Daily Living (ADLs), and who will benefit from assistance or supervision in maintaining independence.

To be eligible for ADCRC services, individuals must be deemed to have Alzheimer’s disease or other dementia related disorders, particularly in the middle to late stages, and their care needs and behavior may make it difficult to participate in community programs or other social settings. Stages of Alzheimer’s are described at: <https://alz.org/alzheimers-dementia/stages>.

V. Location and Time of Services

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

VI. Description of Services

Grantee will operate an Alzheimer's Day Care Resource Center within the framework of a licensed Adult Day Program or Adult Day Health Care to provide the services necessary to meet the needs of participants with Alzheimer's Disease or other dementia related disorders. Grantee will develop a program and maintain a physical environment suitable to caring for participants with conditions associated with dementia and provide respite for the participant's primary caregivers. Services are comprised of four categories: 1) day program services, 2) caregiver support, 3) volunteer services, and 4) education. Program hours are usually Monday through Friday, with an optimum staffing ratio of one staff to five participants. The ADCRC will provide participants with enriching activities and socialization opportunities, and encourage participant engagement. Grantee will develop, organize, and provide training to professionals and other persons caring for the participants. Program staff will disseminate information to the public regarding Alzheimer's disease and related dementias, and provide supportive counseling and resources to families, caregivers, and the general public. Trained volunteers will be part of the care teams and will be included in ongoing ADCRC in-service trainings. In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

VII. Units of Service and Definitions

During the term of the grant, the Grantee will provide the following units of service:

Unduplicated Consumers – A unique individual enrolled and receiving ADCRC services within the fiscal year.

UNIT: One (1) unduplicated consumer

ADCRC Program Hours – Provision of ADCRC services that include specialized dementia-specific care for participants in a supervised, protective, congregate setting during some portion of a 24-hour day. Services typically include enhanced socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling in an environment designed to accommodate participants in the middle to late stages of Alzheimer's Disease or other dementia related disorders. The total units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

Caregiver Support – Provision of information on Alzheimer's Disease or other dementia related disorders and referrals to support groups and/or other provider resources and entities. Supportive counseling assistance for individuals to enable them to resolve problems and make informed decisions about memory care options. Support may include home visits to provide advice and assistance, and emotional support by phone or in-person.

UNIT: One (1) contact

Education and Training Sessions – Provision of education and training to staff, volunteers, caregivers, and the community at large on topics related to Alzheimer’s Disease or other dementia related disorders. Sessions will be conducted by experienced staff, subject matter experts, and/or medical/clinical professionals. Training topics will include care issues surrounding Alzheimer’s Disease or other dementia related disorders, common behaviors associated with dementia, communication methods, and how to work with individuals with dementia. Sessions may also include workshops on caregiving, team building, and client-centered approaches to care and health related issues.

UNIT: One (1) session

Volunteers – A unique individual trained and enlisted as a volunteer to help provide ADCRC services within the fiscal year.

UNIT: One (1) volunteer

Volunteer Time – Opportunities provided to trained volunteers to help with the provision of ADCRC services within the fiscal year. The total units of service to be reported is the cumulative number of hours of service provided by individual volunteers for the ADCRC.

UNIT: One (1) hour

VIII. Service Objectives

On an annual basis:

- A. Grantee will provide ADCRC services to 20 unduplicated consumers.
- B. Grantee will provide 15,000 ADCRC Program hours to consumers.
- C. Grantee will provide a minimum of 10 support group sessions for caregivers of individuals with Alzheimer’s Disease or other dementia related disorders.
- D. Grantee will provide 200 caregiver support contacts to families and caregivers of participants with Alzheimer’s Disease or other dementia related disorders.
- E. Grantee will provide at least 6 education and training sessions to staff and volunteers through experienced staff or outside trainers and/or professionals regarding Alzheimer’s Disease or other dementia related disorders, dementia related behaviors, effective communication methods, etc.

F. Grantee will train and enlist at least **15** volunteers to help with the provision of ADCRC services.

G. Grantee will provide **150** volunteer hours as opportunities for volunteers to provide ADCRC services that they are trained for.

IX. Outcome Objectives

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey administered by the Grantee and other data tracking systems utilized by the Grantee.

- A. Consumers who have been in the program for 6 months or more are able to live in the community instead of being institutionalized. Target: 85%
- B. Consumers are socially engaged as evidenced by their participation in ADCRC services that is appropriate to their stage of Alzheimer's Disease or other dementia related disorders. Target: 85%
- C. Caregivers are more aware of services for Alzheimer's Disease or other dementia related disorders that are available to them and their care recipients as a result of participation in ADCRC services. Target: 85%
- D. Caregivers are better able to provide care to their care recipients living with Alzheimer's Disease or other dementia related disorders as a result of the education and trainings they receive from the ADCRC. Target: 85%
- E. Caregivers are better able to attend to their own personal health and well-being due to the caregiver support they receive from the ADCRC. Target: 85%
- F. Caregivers rate the quality of respite services received from the ADCRC as good or excellent. Target: 85%

X. Reporting and Other Requirements

- A. Grantee must enter consumer data and units of service into CA GetCare – Community Services module by the 5th working day of the month for the preceding month.
- B. Monthly, quarterly, and/or annual program reports must be submitted in the CARBON system as required by HSA/DAS/OCP. All reports are due by the 15th of the month for the preceding reporting period.
- C. Grantee must submit response rates and aggregate data from annual consumer survey to HSA/DAS/OCP by July 15th each year for the preceding grant year.

- D. Grantee must submit a Fiscal Closeout Report in the CARBON system by July 31st each year for the preceding grant year.
- E. Grantee must submit ad hoc reports as requested by HSA/DAS/OCP.
- F. Grantee must submit a bi-annual summary report of SOGI data collected as required by state and local law. The report must be submitted in the CARBON system by January 10th (for data collected between July 1st and December 31st) and July 10th (for data collected between January 1st and June 30th) for each grant year.
- G. Grantee must 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.
- H. Apart from reports requested to be sent via email to the Program Analyst/Manager and/or Contract Manager, all other reports and communications should be sent to the following:

Tahir Shaikh
Contracts Manager
Tahir.Shaikh@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

Fanny Lapitan
Program Manager
Fanny.Lapitan@sfgov.org
P.O. Box 7988
San Francisco, CA 94120

XI. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards and requirements, including client eligibility, back up documentation for units of service and all reporting, progress towards service and outcome objectives, handling and documentation of participant records, and reporting on CA GetCare. Review of agency and organization standards, including organizational chart, qualifications of program staff, and evidence of staff training for Elder Abuse Reporting and Security Awareness Training. Review of program operations, including policies and procedures for all aspects of the program, written project income policies if applicable, grievance procedures, and Quality Assurance plan.
- 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, MOUs, current board roster and selected board minutes for compliance with Sunshine Ordinance.

	A	C	D	E	F
1	Appendix B, Page 1				
2	HUMAN SERVICES AGENCY BUDGET SUMMARY				
3					
4					
5					
6	North & South of Market Adult Day Health (DBA SteppingStone)	7/1/21-6/30/24			
7	(Check One) New <input checked="" type="checkbox"/> Renewal _____ Modification _____				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: Alzheimer's Day Care Resource Center (ADCRC)				
10	Budget Reference Page No.(s)				Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	Expenditures				
13	Salaries & Benefits	\$90,871	\$90,871	\$90,871	\$272,613
14	Operating Expenses	\$4,781	\$4,781	\$4,781	\$14,343
15	Subtotal	\$95,652	\$95,652	\$95,652	\$286,956
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$14,348	\$14,348	\$14,348	\$43,044
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0
19	Total Expenditures	\$110,000	\$110,000	\$110,000	\$330,000
20	HSA Revenues				
21	General Fund	\$110,000	\$110,000	\$110,000	\$330,000
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$110,000	\$110,000	\$110,000	\$440,000
30	Other Revenues				
31					
32					
33					
34					
35					
36	Total Revenues	\$110,000	\$110,000	\$110,000	\$440,000
37	Full Time Equivalent (FTE)	1.5	1.5	1.5	
39	Prepared by: Janet Lee	415-974-6784, ext. 24		b	
40	HSA-CO Review Signature: _____				
41	HSA #1				5/6/2021

	A	B	C	D	E	G	H	I	J
1	Appendix B, Page 2								
2									
3	North & South of Market Adult Day Health (DBA SteppingStone)								
4	Program: Alzheimer's Day Care Resource Center (ADCRC)								
5									
6									
7	Salaries & Benefits Detail								
8									
9									
10									
11		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Program Coordinator	\$62,400	0.80	80%	0.64	\$39,936	\$39,936	\$39,936	\$119,808
14	Activity Coordinator	\$47,216	0.50	77%	0.39	\$18,178	\$18,178	\$18,178	\$54,534
15	Program Aide	\$35,464	0.50	70%	0.35	\$12,412	\$12,412	\$12,412	\$37,236
16	Volunteer Coordinator	\$41,600	0.25	50%	0.13	\$5,200	\$5,200	\$5,200	\$15,600
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30	TOTALS	\$186,680	2.05	277%	1.50	\$75,726	\$75,726	\$75,726	\$227,178
31									
32	FRINGE BENEFIT RATE	20%							
33	EMPLOYEE FRINGE BENEFITS	\$37,336				\$15,145	\$15,145	\$15,145	\$45,435
34									
35									
36	TOTAL SALARIES & BENEFITS	\$224,016				\$90,871	\$90,871	\$90,871	\$272,613
37	HSA #2								5/6/2021

	A	B	C	D	F	G	H	I	J	K	L	M	N
1	Appendix B, Page 3												
2													
3	North & South of Market Adult Day Health (DBA SteppingStone)												
4	Program: Alzheimer's Day Care Resource Center (ADCRC)												
5													
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	<u>Expenditure Category</u>			TERM		<u>7/1/21-6/30/22</u>		<u>7/1/22-6/30/23</u>		<u>7/1/23-6/30/24</u>			TOTAL <u>7/1/21-6/30/24</u>
13	Rental of Property												
14	Utilities(Elec, Water, Gas, Phone, Garbage)												
15	Office Supplies, Postage					\$2,381		\$2,381		\$2,381			\$7,143
16	Building Maintenance Supplies and Repair												
17	Printing and Reproduction												
18	Insurance												
19	Staff Training												
20	Staff Travel-(Local & Out of Town)												
21	Rental of Equipment												
22													
23	CONSULTANTS												
24													
25													
26													
27	OTHER												
28	Program Activity Supplies & Expenses					\$2,400		\$2,400		\$2,400			\$7,200
29													
30													
31	TOTAL OPERATING EXPENSE					<u>\$4,781</u>		<u>\$4,781</u>		<u>\$4,781</u>			\$14,343
32													
33	HSA #3												5/6/2021

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: SteppingStone Adult Day Health

FISCAL YEAR: 2021-2022

CONTRACT: Alzheimer's Day Care Resource Center

DIRECTOR: Dan Gallagher

PHONE NO.: 415 974-6784

SITES:					
Name of Site	Mission Creek Day Health				
Address and Zip	930 4 th Street SF CA 94158				
Phone Number	415 974-6784				
Fax Number	415 974-6785				
Neighborhood	South of Market				
Muni Line #s	T Line, J Church, 30 Line				
Person in Charge	TBD				
Site Manager	Diana Almanza				
Programs Offered at Site	Adult Day Health Care Enhanced Care Coordination LGBT Community Services				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	7:30am to 5:30pm				
Hours of <u>scheduled</u> programming	12:30pm to 3:30pm				
Total number of service days in FY	250				
Days closed	Saturday, Sunday, and federal holidays				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No