



Trent Rhorer, Executive Director

MEMORANDUM

TO: AGING & ADULT SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *JH*

DATE: MAY 2, 2018

SUBJECT: GRANT RENEWAL: **SENIOR AND DISABILITY ACTION**
(NON-PROFIT) FOR THE PROVISION OF SENIOR AND
DISABILITY EMPOWERMENT, HOME CARE ADVOCACY,
HOUSING ADVOCACY AND COUNSELING, AND FOR LONG-
TERM CARE CONSUMER RIGHTS ADVOCACY
See table below

GRANT TERM(S): 7/1/2018 – 6/30/2019

GRANT AMOUNTS: See table below

<u>Source:</u>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
Funding:	\$573,959			\$57,394	\$631,353
Percentage	100%				100%

Program	Fiscal Year (FY) 18-19 Total Amount	10% Contingency	FY 18-19 Total Not to Exceed (NTE) Amount
Senior and Disability Empowerment	\$197,102	\$19,710	\$216,812
Home Care Advocacy	\$102,238	\$10,223	\$112,461
Housing Advocacy and Counseling	\$158,930	\$15,893	\$174,823
Long-Term Care Consumer Rights Advocacy	\$115,689	\$11,568	\$127,257
TOTAL	\$573,959	\$57,394	\$631,353

The Department of Aging and Adult Services (DAAS) requests authorization to renew the grant agreements with **Senior and Disability Action (SDA)** for the following programs: 1) Senior and Disability Empowerment, 2) Home Care Advocacy, 3) Housing Advocacy and Counseling, 4) Long-Term Care Consumer Rights Advocacy, in the amount of \$573,959 plus a 10% contingency for a total amount not to exceed \$631,353. The term of the grants will be from July 1, 2018 to June 30, 2019. The purpose of these grants is for empowerment and advocacy training and collation building. The focus is to help older adults and adults with disabilities understand services available to them, understand their rights as consumers, and understand how to ensure these services and rights. Much of the work is accomplished through collaboration building and joint advocacy with consumers, CBO's and policy makers.

Background

In October of 2010 DAAS conducted a Consumer Advocacy needs assessment to identify programs that best support seniors and adults with disabilities understand and advocate for their own rights and services. The needs assessment was updated in 2015 and listening sessions with community stakeholders have occurred in the interim that confirm earlier assessments. Four stratagems were identified as being most able to positively impact the well-being of seniors and adults with disabilities: 1) Training and Empowerment, 2) Home Care Advocacy, 3) Housing Advocacy and Counseling, 4) Long-Term Care Consumer Rights Advocacy.

Services to be Provided

Senior and Disability Empowerment

Senior and Disability Empowerment includes the Senior and Disability Survival School and the Senior and Disability University Empowerment programs which are two skills training modules. Senior and Disability Survival School educates older adults and people with disabilities on the supportive services available to them, and how to access those services. Senior and Disability University Empowerment provides leadership training to enable consumers to advocate for their communities and themselves. The Empowerment program instructors take their curriculum into the community, with focus on the City's most underserved neighborhoods. Sessions are held at Community Centers, public libraries and housing complexes and are publicized beforehand in conjunction with community partners. Classes can be translated into several languages, are free of cost, and offered in neighborhood hubs throughout San Francisco.

Home Care Advocacy

The Home Care Advocacy program works with consumers, community groups and policy-makers to guarantee older adults and adults with disabilities receive the in-home care essential to living independently in the community. Home care advocacy convenes two interrelated groups: 1) Healthcare Action Team (HAT) and 2) the In- Home Supportive Services (IHSS) Task Force. HAT is a consumer advocacy group that works to empower seniors and people with disabilities. HAT works directly with consumers to gather their experiences, build leadership, and strategize on issues that affect them. The IHSS Task Force knows the importance of policy-makers remaining connected to those directly affected by the IHSS program. The IHSS Task Force brings together leaders of government agencies, non-profit organizations, and labor

representatives with IHSS consumers and providers to facilitate listening, understanding and open communication.

Housing Advocacy and Counseling

The Housing Advocacy and Counseling program works with seniors and adults with disabilities in need of housing, tenant's rights, and Single Room Occupancy hotel ("SRO") intercessions. This is accomplished, in part, through counseling services provided in conjunction with the Housing Rights Committee of San Francisco. Housing advocacy efforts include outreach and education, and coalition building. It also includes participation in public hearings and community forums that advocate for affordable housing, tenant and SRO resident rights. Meetings to specifically advocate for SRO residents are held with the goal of promoting improved living conditions and services for the senior and disabled residents of SRO buildings throughout San Francisco.

Long-Term Care Consumer Rights Advocacy (LTCCRA)

The LTCCRA program provides information and training to individuals, family members, caregivers, and agencies on the services guaranteed through long-term care options in San Francisco. LTCCRA facilitates group trainings, and drop-in clinics at community hubs and resource fairs. Through a multi-lingual call center LTCCRA provides consolidated assistance to consumers. The call center is staffed by trained peer advocates and functions as an advice line by providing referrals, assistance and follow-up services. LTCCRA has developed ongoing training and retention practices to establish a core of peer advocates that provide direct one-to-one support and counseling on long-term care issues and referrals when appropriate.

A newsletter, **SDA News and Views**, is disseminated each month to give updates to the community on SDA programs and events.

Performance Monitoring

The four SDA programs were monitored this winter and spring of 2018. Each program was found in compliance.

Location and Time of Services

Administrative services for Senior and Disability Action will be provided at 1360 Mission St., 4th Floor, San Francisco, CA 94103, during the hours of 9 a.m. to 5 p.m. Monday to Friday. Many program activities occur in the field and at various public spaces in the City, including Community Centers, CBO's and public libraries and recreational centers. All activities are publicized prior to occurring.

Grantee Selections

Grantee was selected through Request for Proposals (RFP) #635, which was competitively bid in February 2015.

Funding

The funding is 100% County General Fund.

Attachments:

Senior and Disability Empowerment

Appendix A1 – Scope of Services to be provided

Appendix B1 – Budget

Home Care Advocacy

Appendix A2 – Scope of Services to be provided

Appendix B2 – Budget

Housing Advocacy and Counseling

Appendix A3 – Scope of Services to be provided

Appendix B3 – Budget

Long-Term Care Consumer Rights Advocacy

Appendix A4 – Scope of Services to be provided

Appendix B4 – Budget

APPENDIX A1 – SCOPE OF SERVICES

**SENIOR AND DISABILITY ACTION
SENIOR AND DISABILITY EMPOWERMENT**

July 1, 2018 to June 30, 2019

I. Purpose

The purpose of this grant is to empower seniors and adults with disabilities through a comprehensive overview of community resources and services. Individuals will learn effective public speaking and communication skills. These trainings will help consumers become advocates on their own behalf and to represent the greater senior and adult with disabilities community as well.

II. Definitions

Adult with Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Empowerment	Two training modules: Senior and Disability Survival School and Senior and Disability University. Classes include activities that help participants learn the various components of independent living: accessing essential services, conflict resolution, leadership, facilitating effective meetings, leadership skills, community organizing, diversity training and political advocacy
Frail	An older individual that is determined to be functionally impaired because the individual: (a) is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision; and/or (b) due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Senior and Disability Action (SDA)
HSA	Human Services Agency of the City and County of San Francisco

Low Income	Having income at or below the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
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 or 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
OCM	Office of Contract Management, Human Services Agency
OOA	Office on the Aging
Outreach and Education	The preparation and distribution of materials that inform and advise seniors and adults with disabilities of their housing rights and the opportunities to participate in advocacy coalitions. Efforts will include referrals from former clients, grassroots constituencies, other non-profits, City agencies, as well as direct outreach at tenant gatherings and forums, resource fairs, apartment buildings, and word of mouth, and distributing general flyers at community centers, senior centers, and community-wide festivals.
Semester	An SDA academic session; four class days with a singular curriculum each day.
Senior & Younger Adults with Disabilities Empowerment Advisory Committee.	An Advisory committee made up of consumers, older adults and adults living with disabilities and advocates. The Advisory Committee meets regularly with the Senior and Disability Survival School and the Senior and Disability University instructors to review class offerings and provide feedback.
Senior	Person who is 60 years or older
Senior & Disability Survival School	A multi-lingual and culturally diverse four-session class that empowers seniors and persons with disabilities in San Francisco. The school aims to provide students with the information, understanding and resources necessary for independent living.
Senior & Disability University	A multi-lingual and culturally diverse four session class that empowers seniors and persons with disabilities in San Francisco. The school aims to provide students with formal training on how to affect change in the civic/political process through advocacy and volunteerism.
SOGI	Sexual Orientation and Gender Identity, <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)

III. Target Population

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

- Low-income
- Non or limited –English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above, or
- 3) Aged 18 to 59 living with a disability

V. Location and Time of Services

The time, date and location of the Survival School and the University are published well in advance of the sessions. SDA purposefully chooses sites from various communities and neighborhoods to be as inclusive as possible of seniors and persons with disabilities from all sectors of the city. The staff is housed at the SDA headquarters at 1360 Mission St., 4th Floor, San Francisco, CA 94103.

VI. Description of Services

The purpose of SDA's Empowerment programs is to educate and inform seniors and people with disabilities in understanding and accessing essential services and help them become advocates on behalf of the greater community of which they are a part.

Senior and Disability Survival School

The Senior and Disability Survival School brings consumer information to seniors and people with disabilities throughout San Francisco. Senior and Disability Survival School trains seniors and adults with disabilities to effectively access vital community resources and to exercise their rights when they do. Classes cover: 1) consumer rights training, 2) healthcare and benefits, 3) transportation, and 4) housing. Each session of the Senior and Disability Survival School includes presentations from a variety of service providers, agency representatives, and advocates. Classes are free of cost and offered in neighborhoods throughout San Francisco.

Senior and Disability University

Senior and Disability University is a leadership training program by and for seniors and people with disabilities in San Francisco. Grantee will prepare students to speak in public and engage in the civic/local government process and help connect students to the volunteer and advocacy

opportunities that will allow them to make a difference in the community. Classes cover 1) public speaking, 2) community organizing skills, 3) leadership development, and 4) empowerment. Classes are offered in several languages: Chinese, English, Russian and Spanish. Classes are free of cost and offered in neighborhoods throughout San Francisco.

VII: Units of Service Definitions

Senior and Disability Survival School

- 1) Grantee will provide Senior and Disability Survival School classes. A unit is one 3-hour class day. Classes can be part of a larger 'semester' long curriculum or one-day classes provided at and tailored to community partner requests.

UNIT: one 3-hour class day

- 2) Grantee will maintain a minimum of number of students for Senior and Disability Survival School to achieve annual goal.

UNIT: one student

- 3) Grantee in tandem with Senior and Disability University will schedule and conduct meetings of the Senior & Younger Adults with Disabilities Empowerment Advisory Committee.

UNIT: one meeting.

Senior and Disability University

- 1) Grantee will provide classes as part of the Senior and Disability University. A unit is one 3-hour class day. Classes can be part of larger 'semester' long curriculum or one-day classes provided at and tailored to community partner requests.

UNIT: one class day.

- 2) Grantee will maintain a minimum of number of students for Senior and Disability University to achieve annual goal.

UNIT: one student

VIII. Service Objectives

Senior and Disability Survival School

On an annual basis:

- Grantee will serve **100** unduplicated consumers.
- Grantee will provide **16** units of service of 3 hour class days.
- Grantee will maintain an average of **10** students per semester.
- Grantee will conduct **6** Advisory Committee meetings.

Senior and Disability University

On an annual basis:

- Grantee will serve **100** unduplicated consumers.
- Grantee will provide **10** units of service of 3 hour class days.
- Grantee will maintain an average of **20** students per semester.

IX. Outcome Objectives

Senior and Disability Survival School

- 1) At least **50%** of the students completing an annual satisfaction survey will rate themselves as more proficient in accessing services and more likely to do so as part of the Senior & Disability Survival School.
- 2) At least **85%** of consumers completing an annual satisfaction survey will state they are more aware of services and resources for the senior and disabled community.
- 3) At least **25%** of the students of the Senior & Disability Survival School will become a volunteer for an existing community or community organization or will participate in a community meeting or public hearing.

Senior and Disability University

- 4) At least **85%** of consumers completing an annual satisfaction survey will rate themselves as more aware of the community organizing process.
- 5) At least **95%** of the students completing an annual satisfaction survey will feel more comfortable speaking in public and express a willingness to do so.
- 6) At least **50%** of the students will become a volunteer for an existing community or community organization or will participate in a public policy process during the contract year.

X. Reporting and Other Requirements

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

- 1) Grantee will enter CA GetCare the consumer data including the Intake Form by the required due date as specified by the OOA.
- 2) The grantee will enter the CA Getcare Service Unit section all the units of service by the 5th working day of the month for the preceding month.

- 3) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the Service Objectives.:
- 4) Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis.
- 5) Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- 6) Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. Response rate will be at least 35% of contracted unduplicated consumers.
- 7) Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis. Grantee will maintain evidence of staff completion of this training.
- 8) Grantee shall enter into CA GetCare, SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.
- 9) Grantee shall develop and deliver ad hoc reports as requested by DAAS and/or HSA.
- 10) Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Linda Murley
Program Analyst
DAAS, Office on the Aging
PO Box 7988
San Francisco, CA 94120
linda.murley@sfgov.org

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
steve.kim@sfgov.org

XI. Monitoring Activities

- 1) Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VIII & IX, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

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

	A	B	C	D
1	Appendix B1, Page 1 Document Date: 3/15/18			
2				
3				
4				
	HUMAN SERVICES AGENCY BUDGET SUMMARY BY PROGRAM			
5	Name			Term
6	Senior and Disability Action			7/1/18-6/30/19
7	(Check One) New Renewal <u> X </u> Modification <u> </u>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Senior and Disability Empowerment			
10	Budget Reference Page No.(s)			
11	Program Term		7/1/18-6/30/19	TOTAL
12	Expenditures			
13	Salaries & Benefits	\$137,696		\$137,696
14	Operating Expense	\$33,697		\$33,697
15	Subtotal	\$171,393		\$171,393
16	Indirect Percentage (%)	15%		15%
17	Indirect Cost (Line 16 X Line 15)	\$25,709		\$25,709
18	Capital Expenditure	\$0		\$0
19	Total Expenditures	\$197,102		\$197,102
20	HSA Revenues			
21	General Fund	\$197,102		\$197,102
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$197,102		\$197,102
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$197,102		\$197,102
37	Full Time Equivalent (FTE)			
39	Prepared by: Jessica Lehman		Telephone No.: 415-546-1333	Date: 3/15/18
40	HSA-CO Review Signature: _____			
41	HSA #1			

	A	B	C	D	E	F	G
1	Appendix B1, Page 2						
2	Document Date: 3/15/18						
3							
4	Program Name: Senior and Disability Empowerment						
5	(Same as Line 9 on HSA #1)						
6							
7	Salaries & Benefits Detail						
8							
9							
10	7/1/18-6/30/19						
11		Agency Totals		For HSA Program		For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/18-6/30/19
13	Senior & Disability Survival School Director	\$50,833	90%	90%	81%	\$41,175	\$41,175
14	Senior & Disability University Director	\$55,103	100%	40%	40%	\$22,041	\$22,041
15	Educator/Organizer	\$46,000	50%	100%	50%	\$23,000	\$23,000
16	University Assistant	\$49,857	100%	16%	16%	\$7,977	\$7,977
17	Executive Director	\$65,149	100%	18%	18%	\$11,727	\$11,727
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	\$151,936	4.40	2.64	2.05	\$105,920	\$105,920
31							
32	FRINGE BENEFIT RATE	30%					
33	EMPLOYEE FRINGE BENEFITS	\$45,581				\$31,776	\$31,776
34							
35							
36	TOTAL SALARIES & BENEFITS	\$197,517				\$137,696	\$137,696
37	HSA #2						

	A	B	C	D	E	F	G	H
1								
2								
3								
4	Program Name: Senior and Disability Empowerment							
5	(Same as Line 9 on HSA #1)							
6								
7	Operating Expense Detail							
8								
9								
10								
11								
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>			<u>TOTAL</u> <u>7/1/18-6/30/19</u>
13	Rental of Property				\$ 16,560			\$ 16,560
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$ 1,180			\$ 1,180
15	Office Supplies, Postage				\$ 1,187			\$ 1,187
16	Building Maintenance Supplies and Repair							\$ -
17	Printing and Reproduction				\$ 678			\$ 678
18	Insurance				\$ 254			\$ 254
19	Staff Training				\$ 300			\$ 300
20	Staff Travel-(Local & Out of Town)				\$ 898			\$ 898
21	Rental of Equipment							\$ -
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE							
23	Translation				\$ 5,220			\$ 5,220
24	Stipend - senior/disability assistant				\$ 2,400			\$ 2,400
25	Website & IT				\$ 800			\$ 800
26								\$ -
27								\$ -
28	OTHER							
29	Participant Travel				\$ 220			\$ 220
30	Meeting Expenses & Program Supplies				\$ 3,900			\$ 3,900
31	Computers & Other Equipment				\$ 100			\$ 100
32								\$ -
33								\$ -
34								
35	TOTAL OPERATING EXPENSE				\$ 33,697			\$ 33,697
36								
37	HSA #3							

APPENDIX A2 – SCOPE OF SERVICES

SENIOR AND DISABILITY ACTION HOME CARE ADVOCACY

July 1, 2018 – June 30, 2019

I. Purpose

Grantee will work with consumers, community groups, unions, and local government, to ensure seniors and adults with disabilities receive critical in-home care.

II. Definitions

Adult with Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual: (a) is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision; and/or (b) due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Senior and Disability Action
HSA	Human Services Agency of the City and County of San Francisco
IHSS	In-Home Supportive Services
In-HomeCare	Supportive care provided in the home. Care may be provided by healthcare professionals who provide medical care needs or by informal caregivers who provide daily care to help to ensure the activities of daily living (ADL's) are met.
Low Income	Having income at or below the federal poverty level defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.

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 or 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
OCM	Office of Contract Management, Human Services Agency
OOA	Office on the Aging
Senior	Person who is 60 years or older
SOGI	Sexual Orientation and Gender Identity. <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)

III. Target Population

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

- Low-income
- Non or limited-English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Services

Participants in the delivery and enhancement of home care and related health issues that affect the ability of seniors and persons with disabilities to live independently in the community.

V. Location and Time of Services

LTCCRA services are provided at 1360 Mission St., 4th Floor, San Francisco, CA 94103. The hours of operation are 9:00 a.m. to 5 p.m., Monday through Friday.

VI. Service Description

Home care Advocacy includes two main components: Healthcare Action Team (HAT) and the In- Home Supportive Services (IHSS) Task Force.

- 1) HAT is a consumer advocacy group that focuses on mobilizing seniors and people with disabilities. HAT gathers consumer experiences and stories, builds leadership, and takes action on issues that affect the lives of its members. Volunteer HAT members educate the community through theater and presentations, meet with local and state legislators, and hold rallies and other public events to inform and influence public opinion, media, and government decisions.
- 2) The IHSS Task Force recognizes the need for decision makers to hear the voices of those directly affected by the IHSS program. The IHSS Task Force brings together leaders of government agencies, non-profit organizations, and labor representatives, along with IHSS consumers and providers. Meetings are held monthly and are convened by Senior and Disability Action.
- 3) A monthly newsletter SDA News and Views is produced to give updates to the community on issues pertaining to home care (i.e., legislative matters, meeting notices, city and/or state budget matters, etc.)

VII. Unit of Service Definitions

- Grantee will hold monthly IHSS Task Force meetings and HAT meetings to address planning and action for home care advocacy.

UNIT: one meeting.

- Grantee will form committees and groups to work as advocates to improve the IHSS delivery system.

UNIT: one committee or group.

- Grantee will provide presentations and outreach activities to educate the public, involve seniors and people with disabilities in home care advocacy.

UNIT: one presentation.

- Grantee will develop legislative relationships with policy makers/legislators, lobbying groups and consumer groups to seek support for IHSS and other home care issues and elicit their participation in impacting the legislative arena.

UNIT: one contact.

- Grantee will develop and create multi-media exposures: news articles, TV or radio talk show appearances, computer exposure, or other creative marketing techniques.

Unit: one exposure.

VIII. Service Objectives

On an annual basis:

- Grantee will convene 5 IHSS Task Force meetings.
- Grantee will convene 5 HAT meetings.
- Grantee will establish 6 strategic committees or alliances.
- Grantee will perform 20 community presentations.
- Grantee will provide 24 units of service of Home Care Advocacy relationships.
- Grantee will provide 12 multi-media exposures.

IX. Outcome Objectives

- 1) At least 35% of participants in the IHSS Taskforce will respond to an annual Consumer satisfaction survey.
- 2) At least 85% of the participants in the IHSS Task Force will report feeling engaged with the operation and accomplishments of the Task Force.
- 3) At least 85% of the participants in the HAT will report feeling engaged with the operation and accomplishments of the Task Force.
- 4) At least 1000 consumers per month will receive updates via SDA Newsletter and email lists to inform, educate and foster advocacy.

X. Reporting and Other Requirements

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

- 1) The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- 2) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the Service Objectives.:
- 3) Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis
- 4) Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- 5) Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. At least 70% of the participants of the IHSS Task Force will complete the consumer satisfaction survey. At least 70% of the Healthcare Action Team (HAT) will complete the consumer satisfaction survey.

- 6) Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- 7) Grantee shall develop and deliver ad hoc reports as requested by DAAS and/or HSA.
- 8) Grantee shall enter into Getcare, SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- 9) Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Linda Murley
Program Analyst
DAAS, Office on the Aging
PO Box 7988
San Francisco, CA 94120
linda.murley@sfgov.org

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120-7988
Steve.Kim@sfgov.org

XI. Monitoring Activities

- 1) Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VIII & IX, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation

that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

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

	A	B	C	D
1	Appendix B2, Page 1			
2	Document Date: 3/16/18			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			Term
6	Senior and Disability Action			7/1/18-6/30/19
7	(Check One) New Renewal <input checked="" type="checkbox"/> Modification <input type="checkbox"/>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Homecare Advocacy			
10	Budget Reference Page No.(s)			
11	Program Term		7/1/18-6/30/19	TOTAL
12	Expenditures			
13	Salaries & Benefits		\$74,728	\$74,728
14	Operating Expense		\$14,175	\$14,175
15	Subtotal		\$88,903	\$88,903
16	Indirect Percentage (%)		15%	15%
17	Indirect Cost (Line 16 X Line 15)		\$13,335	\$13,335
18	Capital Expenditure		\$0	\$0
19	Total Expenditures		\$102,238	\$102,238
20	HSA Revenues			
21	General Fund		\$102,238	\$102,238
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES		\$102,238	\$102,238
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues		\$102,238	\$102,238
37	Full Time Equivalent (FTE)			
39	Prepared by: Jessica Lehman		Telephone No.: 415-546-1333	Date: 3/16/18
40	HSA-CO Review Signature: _____			
41	HSA #1			

	A	B	C	D	E	F	G
1	Appendix B2, Page 2						
2	Document Date: 3/16/18						
3							
4	Program Name: Homecare Advocacy						
5	(Same as Line 9 on HSA #1)						
6							
7	Salaries & Benefits Detail						
8							
9							
10	7/1/18-6/30/19						
11		Agency Totals		For HSA Program		For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/18-6/30/19
13	Healthcare Action Director	\$49,858	100%	97%	97%	\$48,362	\$48,362
14	Executive Director	\$65,149	100%	14%	14%	\$9,121	\$9,121
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29	TOTALS	\$115,007	2.00	1.11	1.11	\$57,483	\$57,483
30							
31	FRINGE BENEFIT RATE	30%					
32	EMPLOYEE FRINGE BENEFITS	\$34,502				\$17,245	\$17,245
33							
34							
35	TOTAL SALARIES & BENEFITS	\$149,509				\$74,728	\$74,728
36	HSA #2						

	A	B	C	D	E	F	G	H
1								
2								
3								
4	Program Name: Homecare Advocacy							
5	(Same as Line 9 on HSA #1)							
6								
7	Operating Expense Detail							
8								
9								
10								
11								
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>			<u>TOTAL</u> <u>7/1/18-6/30/19</u>
13	Rental of Property				\$ 7,570			\$ 7,570
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$ 669			\$ 669
15	Office Supplies, Postage				\$ 1,421			\$ 1,421
16	Building Maintenance Supplies and Repair							\$ -
17	Printing and Reproduction				\$ 907			\$ 907
18	Insurance				\$ 404			\$ 404
19	Staff Training				\$ 200			\$ 200
20	Staff Travel-(Local & Out of Town)				\$ 300			\$ 300
21	Rental of Equipment							\$ -
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE							
23	Translation				\$ 1,050			\$ 1,050
24								\$ -
25								\$ -
26								\$ -
27								\$ -
28	OTHER							
29	Meeting Expenses & Program Supplies				\$ 1,334			\$ 1,334
30	Participant Travel				\$ 320			\$ 320
31								\$ -
32								\$ -
33								\$ -
34								
35	TOTAL OPERATING EXPENSE				\$ 14,175			\$ 14,175
36								
37	HSA #3							

APPENDIX A3

**SENIOR AND DISABILITY ACTION
HOUSING ADVOCACY AND COUNSELING**

July 1, 2018 to June 30, 2019

I. Purpose

The purpose of this grant is to empower seniors and adults with disabilities in the areas of housing and tenant’s rights and Single Room Occupancy hotel (“SRO”) advocacy. This is done through counseling, education and information, community outreach, and civic engagement.

II. Definitions

Adult with Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision; and/or (b) due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Senior and Disability Action (SDA)
Housing Counseling	Provides information to individuals who believe they are in jeopardy of being evicted and provides assistance to those individuals requiring tenant rights advocacy.
Housing Advocacy	Training of individuals and groups to provide information regarding the need of affordable and accessible senior housing. Development of and participation with coalitions working for housing and tenant rights in San Francisco.

Housing Collaborative	A group of tenants, homeowners, community advocates organizing to preserve and create quality, affordable, accessible housing in San Francisco. There is a monthly meeting to strategize community organizing and policy change.
HSA	Human Services Agency of the City and County of San Francisco
Low Income	Having income at or below the federal poverty level defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
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 or 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
OCM	Office of Contract Management, Human Services Agency
OOA	Office on the Aging
Outreach And Education	Preparation and distribution of materials that inform and advise seniors and adults with disabilities of their housing rights as well as opportunities to participate in advocacy coalitions.
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent.
Senior	Person who is 60 years or older
SOGI	Sexual Orientation and Gender Identity. <i>Ordinance No. 159-16</i> which amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)
SRO	Single room occupancy hotel
SRO Collaborative	Organizations funded by Department of Building Inspection to help organize tenants within the SROs.

III. Target Population

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

- Low-income
- Non or limited English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Housing Advocacy and Counseling Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above, or
- 3) Aged 18 -59 living with a disability

V. Location and Time of Services

SDA administrative and general services are located at 1360 Mission St., Suite 400 in San Francisco, Monday through Friday from 9 a.m. to 5 p.m. Housing counseling services are provided at the Housing Rights Committee's 2 locations: 1663 Mission Street with
Counseling Hours: Monday-Thursday 1pm-5pm. HRC Richmond District Office: 4301 Geary Blvd. Call for appointments: 415-947-9085.

VI. Services to be Provided

- 1) Education and Outreach: Preparation and distribution of information to help inform older adults and people with disabilities of housing rights and available housing options, and to empower seniors and people with disabilities to advocate for improved housing options.
- 2) Housing Counseling: will help prevent eviction by providing face to face counseling regarding tenant rights.
- 3) Housing Advocacy: support of affordable and accessible housing for seniors and adults with disabilities. Much of the work is done in coalition with other service providers or community groups.
- 4) SRO Advocacy: To help promote supportive services and improved living conditions for senior and adults with disabilities who reside in SROs.
- 5) Participation in public hearings, community forums, and group meetings for the purpose of advocating for affordable housing for seniors and/or younger adults with disabilities.
- 6) Convene meetings designed to advocate for supportive services and living conditions for seniors and adults with disabilities residing in SROs.

VII. Unit of Service Definitions

- Grantee will provide counseling assistance to individuals on tenant's rights and eviction prevention issues.

UNIT: one consumer receiving counseling

- Grantee will participate in and facilitate meetings to advocate for housing options for seniors and adults with disabilities and improved living conditions and access to supportive services for SRO residents.

UNIT: one public hearing, meeting, demonstration, information sharing event, or other public gathering.

- Grantee will develop the SRO Senior and Disability Workgroup which will include SRO residents, collaborative, the Department of Building Inspection, and other concerned city and community representatives. The purpose of the Workgroup will be to advocate for improved SRO living conditions.

UNIT: one meeting focused on SRO issues.

- Grantee will hold meetings of the Housing Collaborative, bringing together partner agencies with seniors and people with disabilities, to advocate for tenant rights and affordable housing.

UNIT: one meeting of the Housing Collaborative.

- Grantee will involve seniors and people with disabilities in housing and SRO advocacy efforts.

UNIT: one volunteer.

- Grantee will provide outreach to the senior and people with disability community.

UNIT: one hour of outreach.

VIII. Service Objectives

On an annual basis:

- Grantee will provide counseling to 275 consumers.
- Grantee will participate in and/or facilitate 125 public hearings
- Grantee will convene 10 meetings of the SRO Senior and Disability Workgroup
- Grantee will hold 10 meetings of the Housing Collaborative
- Grantee will involve at least 100 volunteers in housing and SRO advocacy efforts
- Grantee will provide 300 hours of outreach,

IX. Outcome Objectives

- 1) At least 35% of consumers will respond to an annual satisfaction survey.
- 2) At least 85% of consumers will state that the agency provided accurate and current tenants rights information to help them with their housing issue.
- 3) At least 75% of consumers surveyed report they participated in advocacy activities; attending community meetings, rallies, letter writing, public testimony.
- 4) At least 75% of SRO residents participating with SDA's SRO Advocacy will agree that advocacy efforts are making progress toward improving living conditions.

X. Reporting Requirements

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

- 1) The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- 2) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding Service Objectives
- 3) Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee. Grantee will enter the annual metrics in the CARBON database by the 15th of the month following the end of the program year on an annual basis.
- 4) Number of consumers satisfied that the agency provided accurate and current tenant rights information to help them prevent eviction or during an eviction proceeding, or to seek affordable housing.
- 5) Number of public hearings, community forums, or meetings held as it relates to housing advocacy issues.
- 6) Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- 7) Grantee will provide an annual consumer satisfaction survey report of 35% of contracted consumers served to OOA by March 15 each grant year.
- 8) Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- 9) Grantee shall develop and deliver ad hoc reports as requested by DAAS and/or HSA.
- 10) Grantee shall enter into Getcare, SOGI data collected in the year as required by state and local law. The due date for submitting the annual summary report is July 10th.
- 11) Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Linda Murley,
Program Analyst
DAAS, Office on the Aging
P.O. Box 7988
San Francisco, CA 94120
Linda.Murley@sfgov.org

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Steve.Kim@sfgov.org

XI. Monitoring Activities

- 1) Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-GetCare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VIII & IX, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.
- 2) Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D
1	Appendix B3, Page 1			
2	Document Date: 3/15/18			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			Term
6	Senior and Disability Action			7/1/18-6/30/19
7	(Check One) New Renewal <u> X </u> Modification <u> </u>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Housing Advocacy and Counseling			
10	Budget Reference Page No.(s)			
11	Program Term		7/1/18-6/30/19	TOTAL
12	Expenditures			
13	Salaries & Benefits	\$110,928		\$110,928
14	Operating Expense	\$27,272		\$27,272
15	Subtotal	\$138,200		\$138,200
16	Indirect Percentage (%)	15%		15%
17	Indirect Cost (Line 16 X Line 15)	\$20,730		\$20,730
18	Capital Expenditure	\$0		\$0
19	Total Expenditures	\$158,930		\$158,930
20	HSA Revenues			
21	General Fund	\$158,930		\$158,930
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES	\$158,930		\$158,930
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues	\$158,930		\$158,930
37	Full Time Equivalent (FTE)			
39	Prepared by: Jessica Lehman		Telephone No.: 415-546-1333	Date: 3/15/18
40	HSA-CO Review Signature: _____			
41	HSA #1			

	A	B	C	D	E	F	G
1	Appendix B3, Page 2						
2	Document Date: 3/15/18						
3							
4	Program Name: Housing Advocacy and Counseling						
5	(Same as Line 9 on HSA #1)						
6							
7	Salaries & Benefits Detail						
8							
9							
10	7/1/18-6/30/19						
11		Agency Totals		For HSA Program		For DHS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/18-6/30/19
13	Housing Organizing Director	\$52,267	100%	98%	98%	\$48,682	\$48,682
14	Housing Organizer	\$49,857	100%	77%	77%	\$27,440	\$27,440
15	Executive Director	\$65,149	100%	18%	18%	\$9,207	\$9,207
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	\$167,273	3.00	1.93	1.93	\$85,329	\$85,329
31							
32	FRINGE BENEFIT RATE	30%					
33	EMPLOYEE FRINGE BENEFITS	\$50,182				\$25,599	\$25,599
34							
35							
36	TOTAL SALARIES & BENEFITS	\$217,455				\$110,928	\$110,928
37	HSA #2						

	A	B	C	D	E	F	G	H
1								
2								
3								
4	Program Name: Housing Advocacy and Counseling							
5	(Same as Line 9 on HSA #1)							
6								
7	Operating Expense Detail							
8								
9								
10								
11								
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>			<u>TOTAL</u> <u>7/1/18-6/30/19</u>
13	Rental of Property				\$ 12,336			\$ 12,336
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$ 760			\$ 760
15	Office Supplies, Postage				\$ 820			\$ 820
16	Building Maintenance Supplies and Repair							\$ -
17	Printing and Reproduction				\$ 710			\$ 710
18	Insurance				\$ 627			\$ 627
19	Staff Training				\$ 180			\$ 180
20	Staff Travel-(Local & Out of Town)				\$ 90			\$ 90
21	Rental of Equipment							\$ -
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE							
23	Subcontract: Eviction Prevention Counseling				\$ 10,500			\$ 10,500
24	Translation				\$ 204			\$ 204
25								\$ -
26								\$ -
27								\$ -
28	OTHER							
29	Participant Travel				\$ 105			\$ 105
30	Meeting Expenses & Program Supplies				\$ 940			\$ 940
31								\$ -
32								\$ -
33								\$ -
34								
35	TOTAL OPERATING EXPENSE				\$ 27,272			\$ 27,272
36								
37	HSA #3							

APPENDIX A4 – SCOPE OF SERVICES

SENIOR AND DISABILITY ACTION LONG-TERM CARE CONSUMER RIGHTS ADVOCACY ("LTCCRA")

July 1, 2018 – June 30, 2019

I. Purpose

The purpose of this grant is to provide information and training to individuals, caregivers, and agencies on the basic rights and services guaranteed through long-term care services in San Francisco.

II. Definitions

Adult with Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAAS	Department of Aging and Adult Services
Disability	A condition attributable to mental or physical impairment, or a combination of mental and physical impairments including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, economic self-sufficiency, cognitive functioning, and emotional adjustment.
Frail	An older individual that is determined to be functionally impaired because the individual either: (a) is unable to perform at least two activities of daily living, including bathing, toileting, dressing, feeding, breathing, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision; and/or (b) due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Senior and Disability Action
HSA	Human Services Agency of the City and County of San Francisco
IHSS	In-Home Supportive Services
Long-Term Care Services	Individualized, coordinated service that enables individual independence, and quality of life. It is common for long-term care to provide assistance with Activities of Daily Living (ADLs) bathing, dressing, eating, toileting. Long-Term Care Services can include services such as In-Home Support Services (IHSS), Adult Daycare, and Caregiver Support.

Low Income	Having income at or below the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
LTCCC	Long-Term Care Coordinating Council is the single body in San Francisco to advise the Mayor on policy, planning and service delivery issues for older adults and people with disabilities. The LTCCC advises, implements and evaluates all issues relating to long term care (LTC) and supportive services, including how different service systems interact..
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 or 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
OCM	Office of Contract Management, Human Services Agency
OOA	Office on the Aging
Peer Advocate	A trained consumer who provides a communication bridge between providers and consumers through the call center.
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent.
Senior	Person who is 60 years or older
SOGI	Sexual Orientation and Gender Identity. <i>Ordinance No. 159-16</i> amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (<i>Chapter 104, Sections 104.1 through 104.9.</i>)

III. Target Population

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

- Low-income
- Non or limited-English speaking
- Minority
- Frail
- Lesbian/Gay/Bisexual/Transgender

IV. Eligibility for Long-Term Care Consumer Rights Advocacy

- 1) Resident of San Francisco
- 2) Aged 60 and above and in need of or a recipient of long-term care services or
- 2) Aged 18 and above with a disability and in need of or a recipient of long-term care services or
- 3) A family member or care provider to persons eligible for long-term care services.

V. Location and Time of Services

LTCCRA services are provided at 1360 Mission St., 4th Floor, San Francisco, CA 94103. The hours of operation are 9:00 a.m. to 5 p.m., Monday through Friday.

VI. Services to be Provided

- 1) Training for consumers and senior service providers on the basic rights and services made available through the many programs providing long-term care services in San Francisco.
- 2) Outreach and information sharing including; development of informational materials, discussion sessions, drop-in clinics at community centers, and resource fairs.
- 3) Centralized information and assistance by creating a multi-lingual, consumer-directed call center that is a central advice line, providing problem-solving referrals, assistance and follow-ups.
- 4) Development of peer advocate training and retention practices to establish and retain a core of peer advocates that will provide direct one-to-one support and counseling on long-term care issues.
- 5) Compiling data on consumer contacts and issues that arise and reporting regularly to DAAS and the LTCCC.

VII: Units of Service Definitions

On an annual basis, the Grantee will provide the following services as part of LTCCRA

- 1) Consumer contact which includes:
 - a. Information and Referral: Providing consumers with information on long-term care services available within their communities.
 - b. Assistance and Advocacy: Linking individuals to available services.
 - c. Follow-up: Contacting the consumer to ascertain status of their concern.

UNIT: one consumer contact.

- 2) Outreach activities include: trainings, discussion sessions, drop-in clinics at community centers, resource fairs.

UNIT: one outreach activity

- 3) Status report: a compilation of consumer requests and concerns accrued by the call center and field workshops.

UNIT: unit is one report given to LTCCC.

VIII. Service Objectives

On an annual basis:

- Grantee will serve 250 unduplicated consumers.
- Grantee will provide 650 Contacts.
- Grantee will provide 60 units of outreach activities.
- Grantee will provide 1 status report to the Long-Term Care Coordinating Council.

IX. Outcome Objectives

- 1) At least 35% of consumers accessing the program will respond to a consumer satisfaction survey.
- 2) At least 70% of consumers credit the LTCCRA Call Center with providing valuable resources that enabled them to better access long-term care services.
- 3) At least 70% of consumers learned about new long-term care resources or services available to them.
- 4) At least 75% of peer advocates are satisfied with their ability to help consumers.

X. Reporting and Other Requirements

- 1) Grantee will provide various reports during the term of the grant agreement.
- 2) The grantee will enter into the CA Getcare Service Unit section all the units of service by the 5th working day of the month for the preceding month.
- 3) Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system regarding the Service Objectives.:
- 4) Grantee will provide an annual report summarizing the contract activities, referencing the tasks as described in Section VIII & IX – Service and Outcome Objectives. This report will also include accomplishments and challenges encountered by the Grantee.
- 5) Grantee shall issue a Fiscal Closeout Report at the end of the fiscal year. The report is due to HSA no later than July 31 each grant year. This report must be submitted to the CARBON system.
- 6) Grantee will provide an annual consumer satisfaction survey report to OOA by March 15 each grant year. At least 35% of contracted unduplicated consumers will complete the Consumer Satisfaction Survey.
- 8) Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.

- 9) The Grantee will be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules. For specific compliance requirements, please refer to Appendices F-1 & F-2.
- 10) Grantee shall develop and deliver ad hoc reports as requested by DAAS and/or HSA.
- 11) Grantee shall enter into Getcare, SOGI data collected in the year as requested by HSA. The due date for submitting the annual summary report is July 10th.
- 13) Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Linda Murley
Program Analyst
DAAS, Office on the Aging
PO Box 7988
San Francisco, CA 94120
linda.murley@sfgov.org

Steve Kim
Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Steve.Kim@sfgov.org

XI. Monitoring Activities

- 1) Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA-Getcare, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VIII & IX, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not

activities that are always available at the facility such as cards or pool, translation and social services are based on staff hours.

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

	A	B	C	D
1	Appendix B4, Page 1			
2	Document Date: 3/15/18			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY			
4	BY PROGRAM			
5	Name			Term
6	Senior and Disability Action			7/1/18-6/30/19
7	(Check One) New Renewal <u> X </u> Modification <u> </u>			
8	If modification, Effective Date of Mod.		No. of Mod.	
9	Program: Long Term Care Consumer Rights Advocacy			
10	Budget Reference Page No.(s)			
11	Program Term		7/1/18-6/30/19	TOTAL
12	Expenditures			
13	Salaries & Benefits		\$69,959	\$69,959
14	Operating Expense		\$30,640	\$30,640
15	Subtotal		\$100,599	\$100,599
16	Indirect Percentage (%)		15%	15%
17	Indirect Cost (Line 16 X Line 15)		\$15,090	\$15,090
18	Capital Expenditure		\$0	\$0
19	Total Expenditures		\$115,689	\$115,689
20	HSA Revenues			
21	General Fund		\$115,689	\$115,689
22				
23				
24				
25				
26				
27				
28				
29	TOTAL HSA REVENUES		\$115,689	\$115,689
30	Other Revenues			
31				
32				
33				
34				
35				
36	Total Revenues		\$115,689	\$115,689
37	Full Time Equivalent (FTE)			
39	Prepared by: Jessica Lehman		Telephone No.: 415-546-1333	Date: 3/15/18
40	HSA-CO Review Signature: _____			
41	HSA #1			

4 Program Name: Long Term Care Consumer Rights Advocacy
5 (Same as Line 9 on HSA #1)

Salaries & Benefits Detail

7/1/18-6/30/19

11	12 POSITION TITLE	Agency Totals		For HSA Program		For DHS Program	TOTAL
		Annual Full Time Salary for FTE	Total % FTE	% FTE	Adjusted FTE	Budgeted Salary	7/1/18-6/30/19
13	Peer Advocate Program Coordinator	\$50,571	100%	94%	94%	\$47,537	\$47,537
14	Executive Director	\$65,149	100%	10%	10%	\$6,515	\$6,515
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30	TOTALS	\$115,720	2.00	1.04	1.04	\$54,052	\$54,052
31							
32	FRINGE BENEFIT RATE	30%					
33	EMPLOYEE FRINGE BENEFITS	\$34,716				\$15,908	\$15,908
34							
35							
36	TOTAL SALARIES & BENEFITS	\$150,436				\$69,959	\$69,959
37	HSA #2						

	A	B	C	D	E	F	G	H
1								
2								
3								
4	Program Name: Long Term Care Consumer Rights Advocacy							
5	(Same as Line 9 on HSA #1)							
6								
7	Operating Expense Detail							
8								
9								
10								
11								
12	<u>Expenditure Category</u>			<u>TERM</u>	<u>7/1/18-6/30/19</u>			<u>TOTAL</u> <u>7/1/18-6/30/19</u>
13	Rental of Property				\$ 5,299			\$ 5,299
14	Utilities(Elec, Water, Gas, Phone, Scavenger)				\$ 656			\$ 656
15	Office Supplies, Postage				\$ 551			\$ 551
16	Building Maintenance Supplies and Repair							\$ -
17	Printing and Reproduction				\$ 403			\$ 403
18	Insurance				\$ 1,537			\$ 1,537
19	Staff Training				\$ 105			\$ 105
20	Staff Travel-(Local & Out of Town)							\$ -
21	Rental of Equipment							\$ -
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE							
23	Subcontract: ILRCSF				\$ 21,000			\$ 21,000
24	Translation				\$ 280			\$ 280
25								\$ -
26								\$ -
27								\$ -
28	OTHER							
29	Meeting Expenses & Program Supplies				\$ 809			\$ 809
30								\$ -
31								\$ -
32								\$ -
33								\$ -
34								
35	TOTAL OPERATING EXPENSE				\$ 30,640			\$ 30,640
36								
37	HSA #3							