



London Breed, Mayor

Department of Human Services
 Department of Disability and Aging Services
 Office of Early Care and Education

Trent Rhorer, Executive Director

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

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

DATE: DECEMBER 4, 2019

SUBJECT: GRANTS MODIFICATION: **BERNAL HEIGHTS NEIGHBORHOOD CENTER FOR COMMUNITY SERVICES FOR OLDER ADULTS AND ADULTS WITH DISABILITIES**

GRANT TERM:	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
	7/1/18- 6/30/20	12/1/19- 6/30/20			
TOTAL GRANT AMOUNT:	\$1,222,980	\$120,000	\$1,342,980	\$134,297	\$1,477,277
ANNUAL AMOUNT:	<u>FY 18/19</u>	<u>FY19/20</u>			
	\$626,098	\$716,882			
Funding Source MODIFICATION FUNDING: PERCENTAGE:	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
	\$120,000			\$12,000	\$132,000
	100%	0%	0%		

The Department of Disability and Aging Services requests authorization to modify the existing grant agreements with Bernal Heights Neighborhood Center (BHNC) for the provision of Community Services to older adults and adults with disabilities for the time period beginning December 1, 2019 and ending June 30, 2020 for an additional amount of \$120,000 for a new grant amount of \$1,342,980, plus a 10% contingency for a total not to exceed amount of \$1,477,277.

Grantee	FY18/19	Current FY19/20	Modification FY19/20	Revised FY19/20	Total FY18/20	10% Contingency	Total Not to Exceed
BHNC - Cortland	\$280,685	\$273,606	\$70,000	\$343,606	\$624,291	\$62,429	\$686,720
BHNC - Excelsior	\$345,413	\$323,276	\$50,000	\$373,276	\$718,689	\$71,868	\$790,557
Total	\$626,098	\$596,882	\$120,000	\$716,882	\$1,342,980	\$134,297	\$1,477,277

Background

Through the City's annual budgeting process, the Board of Supervisors has included one-time-only funding in the amount of \$120,000 to support Community Services programs for older adults and adults with disabilities in District 9 (\$70,000) and District 11 (\$50,000). Due to their one-time-only nature, these additional funds are only available for FY19/20.

Bernal Heights Neighborhood Center Community Service (BHNC) programs are located on Cortland St. in Bernal Heights (District 9) and on Mission St in the Excelsior district of San Francisco (District 11). The two Centers offer a wide array of activities and programming to enhance the cultural, educational, mental and physical well-being of participants in both communities. The sites can also be the entry point for many older adults and adults with disabilities in need of additional services, such as on-site translation and social services.

Services to be Provided

The modification will provide funds to launch the Cultural Wellness Program at the Cortland location. This program will bridge food education and cooking classes based on culture and wellness. Participants will learn how to incorporate healthy substitutes in their favorite recipes while integrating physical activity to their routine. This program will be offered at the Cortland site as well as other housing sites in the area

The modification will also provide funds to hire an outreach coordinator who will focus on reaching, engaging, and motivating the diverse and at times hard to reach older adults and adults with disabilities in the community to connect them to services at the Excelsior site.

Performance

Bernal Heights Neighborhood Center was determined to be in compliance during the Fiscal and Compliance monitoring conducted on February 17, 2019. The grantee was determined to be in compliance with programmatic monitoring conducted on May 3, 2019.

Selection

Grantees were selected through RFP #785 issued in February 2018.

Funding

Modification is provided by the County General Funds.

ATTACHMENTS

Appendix A2-Services to be Provided - Cortland

Appendix B2- Program Budget - Cortland

Appendix A3-Services to be Provided - Excelsior
Appendix B3- Program Budget – Excelsior
Appendix F2- Site Chart

APPENDIX A2 – SERVICES TO BE PROVIDED

Bernal Heights Neighborhood Center

COMMUNITY SERVICES Cortland Location

Effective July 1, 2018 to June 30, 2020
Effective: December 1, 2019

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities in site based Community Centers.

II. Definitions

Adult with a Disability	Person 18 years of age or older living with a disability
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service objectives, run reports, etc.
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.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
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	Bernal Heights Neighborhood Center

HSA	Human Services Agency of the City and County of San Francisco
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, not to be used as a means test to qualify for the program.
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
Older Adult	Person who is 60 years or older, used interchangeably with “senior.”
OCP	Office of Community Partnerships
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent.
Senior	Person who is 60 years or older, used interchangeably with “older adult.”
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>)
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in Grantee’s Community Service program and reflected via enrollment in CA GetCare.

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:

- Low-income
- Non or limited English speaking
- Minority

- Frail
- Lesbian, Gay, Bisexual, Transgender

IV. Eligibility for Community Services

- Resident of San Francisco *and*
- Person aged 60 and above *or*
- Person 18 years of age or older with a disability

V. Location and Time of Services

The details of the sites and operation hours are as attached in the Site Chart (Appendix F2).

VI. Service Description

Community Services consist of activities/services that maintain or improve the quality of life of consumers. Activities and services focus on the physical, social, psychological, economic, educational, recreational, and/or creative needs of older persons and adults with disabilities. These activities and services are provided in the agency's Community Center and in the community.

There are four categories of services:

1) Activity Scheduling – Units of service are measured by the number of scheduled activity hours sponsored by the Community Centers. Activities may include educational presentations, workshops, trainings, cultural events, food bag programs, social events, exercise classes, arts and crafts classes, discussion groups, sports activities, support groups, field trips, and any other group activity that brings people together for education or wellness purposes that help consumers maintain/enhance their level of functioning.

2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.

4) Enhanced Outreach - While there is an expectation that Community Centers will do outreach within their existing Community Service budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach. Enhanced outreach is not being funded through this Grant.

For FY 19-20, the agency will launch a Cultural Wellness Program. This program will bridge food education and cooking classes based around culture and wellness. Participants will learn how to incorporate healthy substitutes in their favorite recipes while integrating exercise into their lifestyle regimen.

VII. Contractor Responsibilities

Services should be provided according to OOA Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual consumers.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual consumer satisfaction survey, pre-approved by Office of Community Partnership staff, to consumers with a response rate of **at least 35%** of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

VIII. Service Objectives

Service Objectives for Fiscal Year 2018 - 2019:

- Grantee will serve **425** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **3,200** units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide **1,500** units of service of translation Services.
- Grantee will provide **3,000** units of service of social services.
- Grantee will provide **0** units of service of enhanced outreach.

Service Objectives for Fiscal Year 2019 – 2020:

- Grantee will serve **425** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **3,200** units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide **1,500** units of service of translation Services.
- Grantee will provide **3,000** units of service of social services.

- Grantee will provide 0 units of service of enhanced outreach.

IX. Outcome Objectives

- At least 80% of participants surveyed will indicate that they receive the services and/or activities they need from the agency.
- At least 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- At least 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- At least 80% of participants surveyed will report that center activities increased their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. 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.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from an annual consumer satisfaction survey to Office of Community Partnerships staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. 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.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver an annual summary report of 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.
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.

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

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
Paulo.salta@sfgov.org

or

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

X. Monitoring Activities

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

	A	B	C	D	E	F
1	Appendix B2, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4	BY PROGRAM					
5	Name					Term
6	Bernal Heights Neighborhood Center					07/01/18-06/30/20
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/> XX					
8	If modification, Effective Date of Mod: 12/1/2019		No. of Mod. #2			
9	Program: Community Services - Cortland					
10	Budget Reference Page No.(s)			Modification #2	Revised	
11	Program Term		07/01/2018-06/30/2019	07/01/2019-06/30/2020	12/01/2019-06/30/2020	07/01/2019-06/30/2020
12	Expenditures					
13	Salaries & Benefits	\$196,078	\$151,104	\$41,566	\$192,670	\$388,748
14	Operating Expense	\$38,431	\$44,941	\$19,304	\$64,245	\$102,676
15	Subtotal	\$234,509	\$196,045	\$60,870	\$256,915	\$491,424
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$35,176	\$29,561	\$9,130	\$38,691	\$73,867
18	Subcontractor/Capital Expenditures	\$11,000	\$48,000		\$48,000	\$59,000
19	Total Expenditures	\$280,685	\$273,606	\$70,000	\$343,606	\$624,291
20	HSA Revenues					
21	General Fund	\$249,810	\$205,310		\$205,310	\$455,120
22	CFDA 93.778	\$30,875	\$25,375		\$25,375	\$56,250
23	COdB		\$6,921		\$6,921	\$6,921
24	OTO FY19-20		\$36,000	\$70,000	\$106,000	\$106,000
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$280,685	\$273,606	\$70,000	\$343,606	\$624,291
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$280,685	\$273,606	\$70,000	\$343,606	\$624,291
37	Full Time Equivalent (FTE)	3.23	2.48		3.72	
39	Prepared by: Pura Nagrampa		Telephone No.: 415-206-2141 x 147			
40	HSA-CO Review Signature: _____					
41	HSA #1					12/4/2019

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3													
4	Bernal Heights Neighborhood Center												
5	Community Service - Cortland												
6													
7	Operating Expense Detail												
8													
9													
10	Expenditure Category	TERM	07/01/2018-06/30/2019	07/01/2019-06/30/2020	Mod #2 12/01/2019-06/30/2020	07/01/2019-06/30/2020						TOTAL 07/01/18-06/30/20	
11	Rental of Property												
12	Utilities(Elec, Water, Gas, Phone, Garbage)		\$ 5,060	\$ 5,226	\$ 2,000	\$ 7,226						\$ 12,286	
13	Office Supplies, Postage		\$ 2,119	\$ 2,278	\$ 2,000	\$ 4,278						\$ 6,397	
14	Building Maintenance Supplies and Repair		\$ 3,300	\$ 3,500	\$ 600	\$ 4,100						\$ 7,400	
15	Printing and Reproduction		\$ 1,400	\$ 1,500	\$ 600	\$ 2,100						\$ 3,500	
16	Insurance		\$ 1,848	\$ 2,033		\$ 2,033						\$ 3,881	
17	Staff Training		\$ 3,000	\$ 3,000		\$ 3,000						\$ 6,000	
18	Staff Travel-(Local & Out of Town)		\$ 3,486	\$ 2,520	\$ 500	\$ 3,020						\$ 6,506	
19	Rental of Equipment		\$ 1,638	\$ 1,720	\$ 2,100	\$ 3,820						\$ 5,458	
20													
21	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE												
22													
23													
24													
25	OTHER												
26	Activity Materials/Supplies and Snacks		\$ 16,580	\$ 23,163	\$ 11,504	\$ 34,667						\$ 51,247	
27													
28													
29													
30	TOTAL OPERATING EXPENSE		\$ 38,431	\$ 44,941	\$ 19,304	\$ 64,245						\$ 102,676	
31													
32	HSA #3											12/4/2019	

	A	B	C	D	E	F
1						Appendix B2, Page 4
2						
3						
4		Bernal Heights Neighborhood Center				
5		Program: Community Services - Cortland				
6						
7		Subcontractor/Capital Expenditures				
8						
9					Mod #2	TOTAL
10		SUBCONTRACTORS	7/1/18-6/30/19	7/1/19-6/30/20	12/1/19-6/30/20	7/1/18-6/30/20
11		Choir Director	\$11,000	\$12,000		\$23,000
12						
13						
14						
15						
16		TOTAL SUBCONTRACTOR COST	\$11,000	\$12,000		\$23,000
17						
18						
19		EQUIPMENT	TERM	7/1/18-6/30/19	7/1/19-6/30/20	7/1/19-6/30/20
20		Units	ITEM/DESCRIPTION			
21			Hand Dryer for bathroom		\$3,500	
22			Front Door Card Key System		\$4,500	
23						
24						
25		TOTAL EQUIPMENT COST		\$0	\$8,000	\$0
26						
27		REMODELING	7/1/18-6/30/19	7/1/19-6/30/20	7/1/19-6/30/20	7/1/18-6/30/20
28		Description:				
29		Exterior Painting - Front of Building		\$28,000		
30						
31						
32		TOTAL REMODELING COST		\$0	\$28,000	\$0
33						
34		TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE	\$11,000	\$48,000	\$0	\$59,000
35						
36		HSA #4				12/4/2019

APPENDIX A3 – SERVICES TO BE PROVIDED

Bernal Heights Neighborhood Center

COMMUNITY SERVICES Excelsior Location

Effective July 1, 2018 to June 30, 2020
Effective: December 1, 2019

I. Purpose

The purpose of this grant is to maintain or improve the well-being of older adults and adults with disabilities through the provision of a variety of services and activities in site based Community Centers.

II. Definitions

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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:

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

IV. Eligibility for Community Services

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- Person aged 60 and above *or*
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2) Translation – Units of service are measured by the number of hours of translation assistance provided to consumers that cannot speak/read English. In addition, translation may also include the use of American Sign Language, braille, or teleprompting. Translation services may include translation of forms, letters, applications, phone calls, etc. for an individual. It can also include written translation from English of monthly activity calendars, flyers, and verbal translation for group announcements, presentations, etc.

3) Social Services – Units of service are measured by the number of hours providing one-to-one assistance for individuals to enable them to resolve problems. Assistance may include information and referral, forms/application completion, home visits, medical escort services, and emotional support by phone or in person.

4) Enhanced Outreach - While there is an expectation that Community Centers will do outreach within their existing Community Service budgets to reach their target populations, some agencies may decide to propose more formal outreach plans or a specific campaign to address access barriers in the community. Examples of this may include working with a community collaborative group, designing and implementing an outreach plan for an underserved area, problem-solving certain barriers to service, i.e., safety issues, transportation needs, etc. Enhanced outreach efforts must receive prior review and approval from Office of Community Partnerships staff before commencing. Units of service are measured by the number of hours spent working on enhanced outreach.

Enhanced outreach will be funded for FY 19-20 through addback funding. This will allow for an outreach coordinator who will focus on reaching, educating, and motivating the diverse and at times hard to reach population in the community to connect to services.

VII. Contractor Responsibilities

Services should be provided according to OOA Community Services Standards, Program Memorandum #41.

Service offerings in the four categories of Community Services should be designed to:

- Provide quality services that attain a high satisfaction level from participants.
- Provide services that meet the needs of individual consumers.
- Provide physical activities that may improve the health of participants.
- Increase access to information and educational materials that help enable individual consumers to maximize independence while living in the community.
- Provide activities to increase socialization opportunities for individual consumers.

Grantee will administer an annual consumer satisfaction survey, pre-approved by Office of Community Partnership staff, to consumers with a response rate of **at least 35%** of the annual unduplicated consumer service objective as specified in the Service Objectives section below.

VIII. Service Objectives

Service Objectives for Fiscal Year 2018 -2019:

- Grantee will serve **800** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **4,000** units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide **4,000** units of service of translation services.
- Grantee will provide **3,900** units of service of social services.
- Grantee will provide **0** units of service of enhanced outreach.

Service Objectives for Fiscal Year 2019 – 2020:

- Grantee will serve **800** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **4,000** units of service of activity scheduling at a center or venues approved by the Office of Community Partnerships.
- Grantee will provide **3,500** units of service of translation services.
- Grantee will provide **3,500** units of service of social services.
- Grantee will provide **1,440** units of service of enhanced outreach.

IX. Outcome Objectives

- At least 80% of participants surveyed will indicate that they receive the services and/or activities they need from the agency.
- At least 80% of participants surveyed who participate in physical activity programming will report positive impact on their health.
- At least 80% of participants surveyed who received social services or translation assistance, or participated in an educational program, will report that this helped to improve their lives.
- At least 80% of participants surveyed will report that center activities increased their socialization opportunities and interaction with others.

X. Reporting and Other Requirements

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

- A. The Grantee will enter consumers' data into the CA GetCare - Community Services module.
- B. 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.
- C. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from an annual consumer satisfaction survey to Office of Community Partnerships staff by March 15th of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November. The time study is due on the 10th day following the time study month.
- F. 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.
- G. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- H. Grantee shall develop and deliver an annual summary report of 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.
- I. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.

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

Paulo Salta
Program Analyst
P.O. Box 7988
San Francisco, CA 94120
Paulo.salta@sfgov.org

or

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

XI. Monitoring Activities

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

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

	A	B	C	D	E	F
1						
2						
3						
4						
5	Name					Term
6	Bernal Heights Neighborhood Center					07/01/18-06/30/20
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/> XX					
8	If modification, Effective Date of Mod: 12/1/2019 No. of Mod. #2					
9	Program: Community Services - Excelsior					
10	Budget Reference Page No.(s)		Modification #2		Revised	
11	Program Term	07/01/2018-06/30/2019	07/01/2019-06/30/2020	12/01/2019-06/30/2020	07/01/2019-06/30/2020	Total
12	Expenditures					
13	Salaries & Benefits	\$226,834	\$185,064	\$34,430	\$219,494	\$446,328
14	Operating Expense	\$73,525	\$80,082	\$9,048	\$89,130	\$162,655
15	Subtotal	\$300,359	\$265,146	\$43,478	\$308,624	\$608,983
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$45,054	\$39,130	\$6,522	\$45,652	\$90,706
18	Capital Expenditure	\$0	\$19,000		\$19,000	\$19,000
19	Total Expenditures	\$345,413	\$323,276	\$50,000	\$373,276	\$718,689
20	HSA Revenues					
21	General Fund	\$307,418	\$262,919		\$262,919	\$570,337
22	CFDA 93.778	\$37,995	\$32,495		\$32,495	\$70,490
23	CODB		\$8,862		\$8,862	\$8,862
24	OTO FY19-20		\$19,000	\$50,000	\$69,000	\$69,000
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$345,413	\$323,276	\$50,000	\$373,276	\$718,689
30	Other Revenues					
31						
32						
33						
34						
35						
36	Total Revenues	\$345,413	\$323,276	\$50,000	\$373,276	\$718,689
37	Full Time Equivalent (FTE)	4.51	4.51		3.76	
39	Prepared by: Pura Nagrampa Telephone No.: 415-206-2140 x 147					
40	HSA-CO Review Signature: _____					
41	HSA #1					12/4/2019

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B3, Page 3												
2													
3													
4	Bernal Heights Neighborhc												
5	Community Service - Excelsior												
6													
7	Operating Expense Detail												
8													
9													
10													
11													
12	Expenditure Category	TERM	07/01/2018-06/30/2019	07/01/2019-06/30/2020	Mod #2 12/01/2019-06/30/2020	07/01/2019-06/30/2020							TOTAL 07/01/18-06/30/20
13	Rental of Property		\$37,176	\$37,248		\$37,248							\$74,424
14	Utilities(Elec, Water, Gas, Phone, Garbage)		\$7,560	\$7,200	\$400	\$7,600							\$15,160
15	Office Supplies, Postage		\$2,370	\$2,370	\$1,000	\$3,370							\$5,740
16	Building Maintenance Supplies and Repair		\$3,480	\$3,480	\$300	\$3,780							\$7,260
17	Printing and Reproduction		\$1,200	\$1,200	\$250	\$1,450							\$2,650
18	Insurance		\$2,731	\$3,003		\$3,003							\$5,734
19	Staff Training		\$3,000	\$3,000	\$500	\$3,500							\$6,500
20	Staff Travel-(Local & Out of Town)		\$4,686	\$3,780	\$1,000	\$4,780							\$9,466
21	Rental of Equipment		\$1,650	\$1,700		\$1,700							\$3,350
22	CONSULTANT/SUBCONTRACTOR DESCRIPTIVE TITLE												
23													
24													
25													
26													
27													
28	OTHER												
29	Social Activities-Food		\$1,625	\$4,000		\$4,000							\$5,625
30	Social Activities-Decorations		\$780	\$1,060		\$1,060							\$1,840
31	Arts & Crafts		\$1,440	\$2,000		\$2,000							\$3,440
32	Field Trips		\$2,700	\$3,600		\$3,600							\$6,300
33	Other Program Supplies		\$3,127	\$6,441	\$5,598	\$12,039							\$15,166
34													
35	TOTAL OPERATING EXPENSE		\$73,525	\$80,082	\$9,048	\$89,130							\$162,655
36													
37	HSA #3											12/4/2019	

	A	B	C	D	E	F	
1	Appendix B3, Page 4						
2							
3							
4	Program Name:						
5	(Same as Line 9 on HSA #1)						
6							
7	Program Expenditure Detail						
8							
9							
10	EQUIPMENT		TERM	7/1/18-6/30/19	7/1/19-6/30/20	12/1/19-6/30/20	
11	No.	ITEM/DESCRIPTION				TOTAL	
12		Hand Dryer for Bathroom		\$ 3,500		\$ 3,500	
13		Front Door Card Key System		\$ 4,500		\$ 4,500	
14							
15							
16							
17							
18							
19							
20	TOTAL EQUIPMENT COST			\$ -	\$ 8,000	\$ -	\$ 8,000
21							
22	REMODELING						
23	Description:						
24							
25		Painting - Interior of building		\$ 11,000		\$ 11,000	
26							
27							
28							
29	TOTAL REMODELING COST			\$ -	\$ 11,000	\$ -	\$ 11,000
30							
31	TOTAL CAPITAL EXPENDITURE			\$ -	\$ 19,000	\$ -	\$ 19,000
32	(Equipment and Remodeling Cost)						
33	HSA #4						
	12/4/2019						

APPENDIX F2 - SITE CHART

HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIP

AGENCY: **Bernal Heights Neighborhood Center**

FISCAL YEAR: 2019

CONTRACT MAILING ADDRESS: 515 Cortland Avenue San Francisco CA 94110

DIRECTOR: Gina Dacus (Executive Director)

PHONE NO.: (415) 206-2140

<u>SITES:</u> (Community Services) Name of Site	Bernal Heights Neighborhood Center	Excelsior Community Center
Address and Zip	515 Cortland Avenue San Francisco CA 94110	4468 Mission Street San Francisco CA 94112
Phone Number	415-206-2140	415-206-2140
Fax Number	415-648-0793	415-334-9918
Neighborhood	Bernal Heights	Mission and Excelsior
Muni Line #s	24, 67, 14, 49	14,49,29
Person in Charge	Ana Vasquez	Ana Vasquez
Site Manager	Roxana Lara	Yajaira Vasquez
Programs Offered at Site	(Community Services, Congregate Meal)	(Community Services, Congregate Meal)
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00 AM – 5:00 PM	9:00 AM – 5:00 PM
Hours of scheduled programming	9:00 AM – 3:00 PM	9:00 AM – 3:00 PM
Hours of meal service	1.00	1.00
Annual number of meals at site	6,534	7,260
Average number of meals per day	25	35
Total number of service days in FY	244	293
Days closed	July 4 Independence Day Sept. 2 Labor Day Nov. 28 Thanksgiving Day Nov.29 Day After Thanksgiving Dec.23 –Dec.31 In Observance of December Holidays Jan.1- Jan. 3 In Observance of December Holidays Jan. 20 Martin Luther King Jr. Day Feb.17 President's Day Mar.31 Cesar Chavez Day May 25 Memorial Day	July 4 Independence Day Sept. 2 Labor Day Nov. 28 Thanksgiving Day Nov.29 Day After Thanksgiving Dec.21 –Dec.31 In Observance of December Holidays Jan.1- Jan. 4 In Observance of December Holidays Jan. 20 Martin Luther King Jr. Day Feb.17 President's Day Mar.31 Cesar Chavez Day May 25 Memorial Day
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No