



London Breed, Mayor

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

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 *J91*

DATE: FEBRUARY 15, 2019

SUBJECT: GRANT MODIFICATION: **ON LOK INC. (NON-PROFIT)** TO  
 CREATE "ENHANCING HEALTHY RELATIONSHIPS"  
 TRAINING

GRANT TERM:	<u>Current</u>	<u>Modification</u>	<u>Revised</u>	<u>Contingency</u>	<u>Total</u>
	7/1/18- 6/30/20	7/1/18- 6/30/19	7/1/18- 6/30/20		7/1/18- 6/30/20
TOTAL AMOUNT:	\$822,714	\$75,000	\$897,714	\$89,771	\$987,485
ANNUAL AMOUNT	<u>FY 18/19</u>	<u>FY 19/20</u>			
	\$496,357	\$401,357			
Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
MODIFICATION					
FUNDING:	\$75,000	\$0	\$0	\$7,500	\$82,500
PERCENTAGE:	100%	0%	0%		100%

The Department of Aging and Adult Services requests authorization to modify the existing grant agreement with On Lok Inc. for the period of July 1, 2018 through June 30, 2019, in the additional amount of \$75,000 plus a 10% contingency for a total amount not to exceed \$987,485. The purpose of this modification is to fund the creation of "Enhancing Healthy Relationships" training tool kits that will be used to train community based organizations on building commonalities and courtesies between diverse consumer groups who are attendees of local Community Centers.

**Background**

On Lok 30<sup>th</sup> Street Older Adult Community Center was granted addback funds in October of 2016 to explore Enhancing Healthy Relationship strategies in their community center. The job of older adult community centers is to provide a respectful and welcoming environment for all participants, regardless of race, ethnicity, religious beliefs, sexual orientation, mobility (functional) issues, language, age, physical or mental health. Working with Dr. Patrick Arbore of the Institute on Aging, On Lok 30<sup>th</sup> Street used their community center as a testing ground to raise awareness in consumers and staff on the issue of older adult bullying. Development of this training program included focus groups and interviews with Center attendees to help guide in the crafting of training protocols. The training program was launched internally to consumers and staff at On Lok 30<sup>th</sup> Street in 2017. In 2018, On Lok 30<sup>th</sup> Street was invited to present their findings at the American Society of Aging annual conference in San Francisco. Numerous conference attendees identified with the issues presented and asked for help training their own consumers and staff.

**Services to be Provided**

This modification will provide for the creation of Enhancing Healthy Relationships tool kits that will be used to train staff and consumers on confronting, altering and dissuading difficult behavior. Two tool kits will be created: one tool kit will be for staff training and the other tool kit will be for senior participant education

The tool kits will include all necessary components to conduct successful trainings, such as: signage, syllabus, and interactive activities. One tool kit will be geared toward the training of community center staff and the other tool kit will be geared towards raising awareness among older adult consumers. By working with stakeholders to find solutions, and by empowering individuals at centers to be a part of building a healthy community, it is possible to keep community centers inclusive and welcoming for all.

**Monitoring**

FY17-18 program monitoring took place in November of 2017. FY 18-19 program monitoring will occur in April of this year. The grantee was deemed compliant to contract terms. The grantee received a waiver for the FY17-18 fiscal monitoring and the FY 18-19 fiscal monitoring site visit is currently scheduled for February 26, 2019.

**Selection**

Grantee was selected through RFP #785, which was issued in February 2018.

**Funding**

The grant will be funded through City and County general funds.

**ATTACHMENTS**

Appendix A1 – Services to be Provided

Appendix B1 – Budget

**APPENDIX A1 – SERVICES TO BE PROVIDED**

**ON LOK DAY SERVICES / 30TH STREET SENIOR CENTER**

**COMMUNITY SERVICES**

**Effective July 1, 2018 to June 30, 2020**

**Modified: February 15, 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 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.
DAAS	Department of Aging and Adult 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 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, transferring and mobility and associated tasks, without substantial human assistance, including verbal reminding, physical cueing or supervision. (b) Due to a cognitive or other mental impairment, requires substantial supervision because the older individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	On Lok / 30 <sup>th</sup> Street Senior 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	Defined by Race, Ethnicity, Religion, Sexual Orientation, and/or Gender Identity
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older
OOA	Office on the Aging

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> )
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 F).

### 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 on the Aging staff before commencing. Units of Service are measured by the number of hours spent working on Enhanced Outreach.

Enhanced Outreach is being provided as part of this grant, details of Grantee's Enhanced Outreach are as follows:

Grantee will codify an 'Enhancing Healthy Relationships' (bully prevention) training. Bullying behavior is underreported and it is hard to find exact numbers on this public health problem. It is estimated that 10-20% of older people have experienced some type of senior-to-senior aggression in an institutionalized setting. The Enhancing Healthy Relationships training will help to ensure Community Services/Community Centers, are welcoming and safe for consumers.

## **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 on the Aging 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

On an annual basis:

- Grantee will serve **1,550** unduplicated consumers, older adults and adults with disabilities.
- Grantee will provide **8,100** units of service of Activity Scheduling at a center or venues approved by the Office on the Aging.
- Grantee will provide **2,060** units of service of Translation.
- Grantee will provide **1,800** units of service of Social Services.

### **In Addition to the above, the following Service Objectives are added for FY 2018 - 2019**

- Grantee will provide **50** units of service of Enhanced Outreach.
- Grantee will develop **2** Enhancing Healthy Relationship tool kits that will be available for use by community based organizations. Tool kit will include all necessary components to conduct successful trainings (signage, syllabus, interactive activities). One tool kit will be for *staff training*, and the other for *senior participant education*.
- Using staff training tool kit, Grantee will provide train the trainer sessions for staff at **2** San Francisco community centers.

## 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.
- **85 % of staff who participate in the Enhancing Healthy Relationship training will indicate they feel better prepared to address difficult behavior at their community center and can help ensure a welcoming and safe environment for consumers.**



## 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 DAAS and Contracts Department staff.
- D. Grantee will submit response rates and aggregated data from Annual Consumer Satisfaction survey to Office on the Aging staff by March 15<sup>th</sup> of each grant year.
- E. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAAS for the months of February, May, August and November. The time study is due on the 10<sup>th</sup> 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/DAAS/OOA.
- 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 10<sup>th</sup>.
- I. Grantee will develop and maintain with OOA's approval, an updated Site Chart (using OOA'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:

Linda Murley  
Program Analyst  
Department of Aging and Adult Services  
[Linda.Murley@sfgov.org](mailto:Linda.Murley@sfgov.org)

or

Steve Kim  
Contract Manager  
Human Services Agency  
[Steve.Kim@sfgov.org](mailto: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 of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; review of program operation, which includes a review of a written policies and procedures manual of all OOA funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections VI and VII, 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	<b>On Lok Day Services</b>					07/01/18-06/30/20
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>					
8	If modification, Effective Date of Mod. 7/1/2018		No. of Mod. 1			
9	<b>Program: Community Services</b>					
10	Budget Reference Page No.(s)		Modification	Revised		Revised
11	Program Term	07/01/2018-06/30/2019	07/01/2018-06/30/2019	07/01/2018-06/30/2019	07/01/2019-06/30/2020	Total
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$309,695	\$0	\$309,695	\$311,683	\$621,378
14	Operating Expense	\$56,535	\$68,808	\$125,343	\$56,535	\$181,878
15	<b>Subtotal</b>	\$366,230	\$68,808	\$435,038	\$368,218	\$803,256
16	Indirect Percentage (%)	9%	9%	9%	9%	9%
17	Indirect Cost (Line 16 X Line 15)	\$32,960	\$6,192	\$39,152	\$33,139	\$72,291
18	Subcontractor/Capital Expenditures	\$22,167	\$0	\$22,167	\$0	\$22,167
19	<b>Total Expenditures</b>	\$421,357	\$75,000	\$496,357	\$401,357	\$897,714
20	<b>HSA Revenues</b>					
21	General Fund	\$375,008	\$0	\$375,008	\$357,208	\$732,216
22	CFDA 93.778	\$46,349	\$0	\$46,349	\$44,149	\$90,498
23	FY18-19 OTO		\$75,000	\$75,000		\$75,000
24						
25						
26						
27						
28						
29	<b>TOTAL HSA REVENUES</b>	\$421,357	\$75,000	\$496,357	\$401,357	\$897,714
30	<b>Other Revenues</b>					
31	Fundraising	\$60,203	\$0	\$60,203	\$60,203	\$120,406
32	Volunteers	\$246,261	\$0	\$246,261	\$246,261	\$492,523
33						
34						
35						
36	<b>Total Revenues</b>	\$727,821	\$75,000	\$802,821	\$707,821	\$1,510,642
37	Full Time Equivalent (FTE)	4.31	0.00	4.31	4.31	
39	Prepared by: Valorie Villela		Telephone No.: (415) 550-2211			
40	HSA-CO Review Signature: _____					
41	HSA #1					2/15/2019

	A	B	C	D	E	F	G	H
1								
2								
3	On Lok Day Services							
4	Program: Community Services							
5								
6								
7	<b>Salaries &amp; Benefits Detail</b>							
8								
9								
10						07/01/2018- 06/30/2019	07/01/2019- 06/30/2020	
11		Agency Totals		HSA Program		DAAS Program	DAAS Program	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	07/01/2018-06/30/20
13	Accountant	\$51,501	1.00	35%	0.35	\$18,025	\$18,025	\$36,050
14	Activities Program Manager	\$60,819	1.00	65%	0.65	\$39,532	\$39,532	\$79,064
15	Administrative Secretary	\$61,818	1.00	10%	0.10	\$6,182	\$6,182	\$12,364
16	Assistant Director	\$85,000	1.00	40%	0.40	\$34,000	\$34,000	\$68,000
17	Director	\$153,816	1.00	10%	0.10	\$15,382	\$15,382	\$30,764
18	Senior Center Associate	\$44,990	1.00	100%	1.00	\$44,990	\$44,990	\$89,980
19	Hospitality Ctr Coord	\$43,680	1.00	43%	0.43	\$18,782	\$18,782	\$37,564
20	Volunteer Program Manager	\$55,016	1.00	70%	0.70	\$38,511	\$38,511	\$77,022
21	Com Serv Progr Asst.	\$45,760	0.58	100%	0.58	\$26,544	\$28,097	\$54,641
22								\$0
23					-			\$0
24					-			\$0
25					-			\$0
26					-			\$0
27					-			\$0
28					-			\$0
29					-			\$0
30	TOTALS	\$ 602,400	8.58	473%	4.31	\$241,949	\$243,502	\$485,451
31								
32	FRINGE BENEFIT RATE	28%						
33	EMPLOYEE FRINGE BENEFITS	\$168,672				\$67,746	\$68,181	\$135,927
34								
35								
36	TOTAL SALARIES & BENEFITS	\$771,072				\$309,695	\$311,683	\$621,378
37	HSA #2							2/15/2019

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3													
4													
5													
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	A	B	C	D	E
1					
2					
3		<b>On Lok Day Services</b>			
4		<b>Program: Community Services</b>			
5		(Same as Line 9 on HSA #1)			
6					
7		<b>Subcontractor/Capital Expenditures</b>			
8					
9					<b>TOTAL</b>
10		<b>SUBCONTRACTORS</b>	7/1/18-6/30/19	7/1/19-6/30/20	7/1/18-6/30/20
11		Jesuit Volunteer Corps	\$2,167	\$0	\$2,167
12		Community Music Center Older Adult Choir Program	\$20,000	\$0	\$20,000
13					\$0
14					\$0
15					\$0
16		<b>TOTAL SUBCONTRACTOR COST</b>	\$22,167	\$0	\$22,167
17					
18					
19		<b>EQUIPMENT</b>	<b>TERM</b>	7/1/18-6/30/19	7/1/19-6/30/20
20	Units	ITEM/DESCRIPTION			
21		Equipment A			
22					
23					
24					
25		<b>TOTAL EQUIPMENT COST</b>	\$0	\$0	\$0
26					
27		<b>REMODELING</b>	7/1/18-6/30/19	7/1/19-6/30/20	7/1/18-6/30/20
28		Description:			
29		Remodel A			
30					
31					
32		<b>TOTAL REMODELING COST</b>	\$0	\$0	\$0
33					
34		<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	\$22,167	\$0	\$22,167
35					
36		<b>HSA #4</b>			2/15/2019