



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org



London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS DS
EE

DATE: WEDNESDAY, OCTOBER 5, 2022

SUBJECT: **GRANT MODIFICATION: MULTIPLE GRANTEES
(NON-PROFIT) FOR PROVISION OF AGING &
DISABILITY RESOURCE CENTER (ADRC)**

| | <u>Current</u> | <u>Modification</u> | <u>Revised</u> | <u>Contingency</u> | <u>Total</u> |
|-----------------------|--------------------------|----------------------|-----------------------|--------------------|--------------|
| GRANT TERM: | 01/01/21- 06/30/24 | 10/01/22- 6/30/24 | 01/01/21- 06/30/24 | | |
| GRANT AMOUNT: | See table below (Page 2) | | | | |
| ANNUAL AMOUNT: | <u>FY 21</u> | <u>FY 21/22</u> | <u>FY 22/23</u> | <u>FY 23/24</u> | |
| | \$193,816 | \$481,311 | \$789,008 | \$775,008 | |
| Funding Source | <u>County</u> | <u>State</u> | <u>Federal</u> | <u>Contingency</u> | <u>Total</u> |
| FUNDING: | \$2,290,643 | \$172,414 | | \$223,914 | \$2,463,057 |
| PERCENTAGE: | 93% | 7% | | | 100% |

The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grant with multiple providers for the period of October 1, 2022 to June 30, 2024, in the additional amount of \$381,308 plus a 10% contingency for a revised total amount not to exceed \$2,463,057. The purpose of this modification is to increase the language capacity for Chinese, Russian and Tagalog offered by the ADRC program.

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| Agency | Current Grant Amount | FY 22-23, FY 23-24 Total Mod Amount | Revised FY21-24 Amount | 10% Contingency | FY21-24 Total Not to Exceed |
|------------------------------------|----------------------|-------------------------------------|------------------------|------------------|-----------------------------|
| Catholic Charities | \$418,129 | \$70,910 | \$489,039 | \$48,904 | \$537,943 |
| Mission Neighborhood Centers (MNC) | \$686,090 | \$150,662 | \$836,752 | \$83,675 | \$920,427 |
| Sequoia Living | \$753,616 | \$159,736 | \$913,352 | \$91,335 | \$1,004,687 |
| TOTAL | \$1,857,835 | \$381,308 | \$2,239,143 | \$223,914 | \$2,463,057 |

Background

The Aging and Disability Resource Center serves as a one-stop shop for information, referral, assistance, and translation services throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community. Specifically, ADRCs around the City provide services that assist people to continue living independently in the community, connecting them with long-term services and supports. ADRCs are located throughout the City and each ADRC has trained staff and on-site supervisors.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts in San Francisco. Some districts have multiple sites, depending on the borders of their districts and the availability of appropriate hubs. Each ADRC must demonstrate the capability to serve older people and adults with disabilities in their supervisory district and neighboring districts, if applicable.

Services to be Provided

The ADRC provides one-stop shop access to information, referral, assistance, and translation services for older people, adults with disabilities, and caregivers at key neighborhood locations. ADRC staff work in multiple sites which are already hubs for older people and adults with disabilities accessing other services. The ADRC staff provide services a minimum of 5 days a week. An additional Citywide ADRC Coordinator meets with staff employed by ADRC sites on a weekly and monthly basis. This coordinator is responsible for providing training, clinical consultation, and executing an outreach plan for the ADRC sites. The Citywide ADRC Coordinator and on-site supervisor meet monthly to avoid any issues of dual consultation/support.

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Modification

The following modifications include:

Catholic Charities

The additional funding supports increasing the Tagalog speaking staff person from half-time to full-time. This staffing addition will increase the units for all five service objectives and have a significant impact on supporting the language needs of District 11.

Mission Neighborhood Centers

The additional funding supports the hiring of a full-time Russian speaking staff person. This staffing addition will increase the units for all five service objectives and have a significant impact on supporting the language needs of District 09.

Sequoia Living

The additional funding supports hiring a full-time Chinese speaking staff person. This staffing addition will increase the units for all five service objectives. Located in District 5, this addition will have significant impact on supporting the language needs of Districts 5 and 6.

Selection

Grantee was selected through Request for Proposals (RFP) #874, which was competitively bid in September 2020.

Funding

Funding for this grant is provided through a combination of State and County General Funds.

ATTACHMENTS

Catholic Charities

Appendix A-2, Scope of Services
Appendix B-2, Budget

Mission Neighborhood Centers

Appendix A-3, Scope of Services
Appendix B-3, Budget

Sequoia Living

Appendix A-2, Scope of Services
Appendix B-2, Budget

**APPENDIX A-2 – SERVICES TO BE PROVIDED
CATHOLIC CHARITIES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: October 1, 2022**

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

| | |
|-------------------------|--|
| ADRC | An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referrals between a wide array of organizations, and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options. |
| Adult with a Disability | Person 18 years of age or older living with a disability |
| CARBON | Contracts Administration, Reporting and Billing On Line System |
| Caregiver | An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver. |
| City | City and County of San Francisco, a municipal corporation |
| 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. |
| Follow-Up | To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made. |

| | |
|--------------------|---|
| 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. |
| HSA | San Francisco Human Services Agency |
| LGBTQ+ | An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary. |
| 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 clients 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. |
| Senior/Older Adult | Person who is 60 years of age or older |

III. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

Services will be provided at Catholic Charities OMI Senior Center: at 65 Beverly Street, San Francisco, CA 94132. Hours of operation are from 8:30am-3:30pm, Monday-Friday.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.
- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of unduplicated clients.

- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.

On an annual basis, Catholic Charities ADRC:

- Will serve the following unduplicated older adults:
 - 560 in FY 20/21
 - 1150 in FY 21/22
 - 1650 in FY 22/23
 - 1710 in FY 23/24
- Will serve the following unduplicated adults with disabilities:
 - 35 in FY 20/21
 - 85 in FY 21/22
 - 115 in FY 22/23
 - 120 in FY 23/24
- Will provide the following units of information and referral services:
 - 750 in FY 20/21
 - 1500 in FY 21/22
 - 2100 in FY 22/23
 - 2150 in FY 23/24
- Will provide the following service units of assistance:
 - 700 in FY 20/21
 - 1300 in FY 21/22
 - 1950 in FY 22/23
 - 2000 in FY 23/24
- Will provide the following units of follow-up services:
 - 200 in FY 20/21
 - 350 in FY 21/22
 - 600 in FY 22/23
 - 650 in FY 23/24

Each grantee will report the previous service objectives on a quarterly basis:

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. 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.
- G. 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:

Sara Hofverberg
Program Analyst
Department of Disability and Aging Services (DAS)
Sara.Hofverberg@SFgov.org

Patrick Garcia
Contract Manager
Human Services Agency (HSA)
Patrick.Garcia@SFgov.org

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational

chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all 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 V and VI.

- 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**

| Name | | | | | | | | | Term |
|--|------------------|------------------|------------------|-----------------|------------------|--|------------------|------------------|------------------|
| Catholic Charities | | | | | | | | | 1/1/21 - 6/30/24 |
| (Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/> | | | | | | | | | |
| If modification, Effective Date of Mod. 10/1/22 No. of Mod. 2 | | | | | | | | | |
| Program: Aging and Disability Resource Center (ADRC) | | | | | | | | | |
| Budget Reference Page No.(s) | | | | Modification | | Modification | | | (Total) |
| Program Term | 1/1/21 - 6/30/21 | 7/1/21 - 6/30/22 | 7/1/22 - 6/30/23 | 10/1/22 - | 7/1/22 - 6/30/23 | 7/1/23 - 6/30/24 | 7/1/23 - 6/30/24 | 7/1/23 - 6/30/24 | 1/1/21 - 6/30/24 |
| Expenditures | | | | | | | | | |
| Salaries & Benefits | \$40,027 | \$80,146 | \$113,527 | \$30,546 | \$144,073 | \$113,527 | \$30,267 | \$143,794 | \$408,040 |
| Operating Expenses | \$1,728 | \$4,523 | \$5,057 | \$284 | \$5,341 | \$5,057 | \$563 | \$5,620 | \$17,212 |
| Subtotal | \$41,755 | \$84,669 | \$118,584 | \$30,830 | \$149,414 | \$118,584 | \$30,830 | \$149,414 | \$425,252 |
| Indirect Percentage (%) | 15% | 15% | 15% | | 15% | 15% | | 15% | 15% |
| Indirect Cost (Line 16 X Line 15) | \$6,264 | \$12,701 | \$17,786 | \$4,625 | \$22,411 | \$17,786 | \$4,625 | \$22,411 | \$63,787 |
| Subcontractor/Capital Expenditures | | | | | | | | | |
| Total Expenditures | \$48,019 | \$97,370 | \$136,370 | \$35,455 | \$171,825 | \$136,370 | \$35,455 | \$171,825 | \$489,039 |
| HSA Revenues | | | | | | | | | |
| Federal (CFDA 93.778) | \$4,517 | \$9,144 | \$9,144 | | \$9,144 | \$9,144 | | \$9,144 | \$31,949 |
| Local | \$40,649 | \$82,297 | \$82,297 | | \$82,297 | \$82,297 | | \$82,297 | \$287,540 |
| CODB | \$2,559 | \$5,379 | \$5,379 | \$5,455 | \$10,834 | \$5,379 | \$5,455 | \$10,834 | \$29,606 |
| MCO | \$294 | \$550 | \$550 | | \$550 | \$550 | | \$550 | \$1,944 |
| Language Staffing | | | \$39,000 | \$30,000 | \$69,000 | \$39,000 | \$30,000 | \$69,000 | \$138,000 |
| TOTAL HSA REVENUES | \$48,019 | \$97,370 | \$136,370 | \$35,455 | \$171,825 | \$136,370 | \$35,455 | \$171,825 | \$489,039 |
| Other Revenues | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| Total Revenues | \$48,019 | \$97,370 | \$136,370 | \$35,455 | \$171,825 | \$136,370 | \$35,455 | \$171,825 | \$489,039 |
| Full Time Equivalent (FTE) | | | | | | | | | |
| Prepared by: Patty Clement / Rosa Mendez / Delilah Perez | | | | | | Telephone No.: 415-452-3504 / 415-972-1208 | | | |
| HSA-CO Review Signature: _____ | | | | | | | | | |
| HSA #1 | | | | | | | | | |

| POSITION TITLE | Salaries & Benefits Detail | | | | | | | | | | | | | | | | TOTAL | | | | | | | | |
|--------------------------------|---------------------------------|-----------|--------------------------------|--------------|------------------|---------------------------------|-------------|--------------------------------|------------------|-------------------|---------------------------------|------------------|--------------------------------|------------------|-----------------|---------------------------------|-----------|-----------|--------------------------------|--------------|-----------------|-----------------|-----------------|-----------------|-----------|
| | 1/1/21 - 6/30/21 | | | | 7/1/21 - 6/30/22 | | | | Modification | | | Modification | | | (Total) | | | | | | | | | | |
| | Agency Totals | | HSA Program | | Agency Totals | | HSA Program | | 7/1/22 - 6/30/23 | 10/1/22 - 6/30/23 | 7/1/22 - 6/30/23 | 7/1/23 - 6/30/24 | | 7/1/23 - 6/30/24 | | 7/1/23 - 6/30/24 | | | | | | | | | |
| | Annual Full Time Salary for FTE | Total FTE | % FTE funded by HSA (Max 100%) | Adjusted FTE | Budgeted Salary | Annual Full Time Salary for FTE | Total FTE | % FTE funded by HSA (Max 100%) | Adjusted FTE | Budgeted Salary | Annual Full Time Salary for FTE | Total FTE | % FTE funded by HSA (Max 100%) | Adjusted FTE | Budgeted Salary | Annual Full Time Salary for FTE | | Total FTE | % FTE funded by HSA (Max 100%) | Adjusted FTE | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | |
| Program Director | \$76,899 | 1.00 | 10% | 0.10 | \$3,974 | \$80,759 | 1.00 | 10% | 0.10 | \$8,076 | \$86,409 | 1.00 | 10% | 0.10 | \$8,771 | \$86,409 | 1.00 | 10% | 0.10 | \$8,624 | \$86,409 | \$8,641 | \$8,641 | \$29,332 | |
| Infrom/Referral Coordinator #1 | \$44,990 | 1.00 | 98% | 0.98 | \$22,068 | \$45,254 | 1.00 | 97% | 0.97 | \$43,877 | \$47,959 | 1.00 | 100% | 1.00 | \$45,254 | \$2,705 | \$47,959 | 1.00 | 100% | 1.00 | \$45,058 | \$2,693 | \$47,751 | \$181,655 | |
| Infrom/Referral Coordinator #2 | | | | - | | | | - | | \$47,959 | 1.00 | 95% | 0.95 | \$22,839 | \$22,722 | \$45,561 | 1.00 | 95% | 0.95 | \$23,182 | \$22,379 | \$45,561 | \$91,122 | | |
| Prog Assistant Back-Up | \$39,292 | 1.00 | 19% | 0.19 | \$3,829 | \$39,292 | 1.00 | 20% | 0.20 | \$7,858 | \$44,645 | 1.00 | 12% | 0.12 | \$7,858 | (\$2,501) | \$5,357 | 1.00 | 12% | 0.12 | \$7,858 | (\$2,501) | \$5,357 | \$22,401 | |
| | | | | - | | | | - | | | | | - | | | | | | - | | | | | | |
| | | | | - | | | | - | | | | | - | | | | | | - | | | | | | |
| | | | | - | | | | - | | | | | - | | | | | | - | | | | | | |
| TOTALS | \$161,181 | 3.00 | 128% | 1.28 | \$29,871 | \$165,305 | 3.00 | 127% | 1.27 | \$59,811 | \$226,972 | 4.00 | 217% | 2.17 | \$84,722 | \$22,796 | \$107,518 | \$226,972 | 4.00 | 217% | 2.17 | \$84,722 | \$22,588 | \$107,310 | \$304,510 |
| FRINGE BENEFIT RATE | 34% | | | | 34% | | | | 34% | | | | | 34% | | | | | 34% | | | | | | |
| EMPLOYEE FRINGE BENEFITS | \$54,802 | | | | \$10,156 | \$56,204 | | | \$20,335 | \$77,170 | | | | \$28,805 | \$7,750 | \$36,555 | \$77,170 | | | \$28,805 | \$7,679 | \$36,484 | \$103,530 | | |
| TOTAL SALARIES & BENEFITS | \$215,983 | | | | \$40,027 | \$221,509 | | | \$80,146 | \$304,142 | | | | \$113,527 | \$30,546 | \$144,073 | \$304,142 | | | \$113,527 | \$30,267 | \$143,794 | \$408,040 | | |

Catholic Charities
Program: Aging and Disability Resource Center (ADRC)

Operating Expense Detail

| Expenditure Category | 1/1/21 - 6/30/21 | 7/1/21 - 6/30/22 | Modification | | | Modification | | | (Total) 1/1/21 - 6/30/24 |
|---|------------------|------------------|------------------|-------------------|------------------|------------------|------------------|------------------|-----------------------------|
| | | | 7/1/22 - 6/30/23 | 10/1/22 - 6/30/23 | 7/1/22 - 6/30/23 | 7/1/23 - 6/30/24 | 7/1/23 - 6/30/24 | 7/1/23 - 6/30/24 | |
| Rental of Property | | \$500 | \$979 | | \$979 | \$979 | \$113 | \$1,092 | \$2,571 |
| Utilities(Elec, Water, Gas, Phone, Garbage) | \$670 | \$1,360 | \$1,360 | | \$1,360 | \$1,360 | | \$1,360 | \$4,750 |
| Office Supplies, Postage | | \$265 | \$320 | | \$320 | \$320 | | \$320 | \$905 |
| Building Maintenance Supplies and Repair | \$100 | \$200 | \$200 | | \$200 | \$200 | | \$200 | \$700 |
| Printing and Reproduction | \$50 | | | | | | | | \$50 |
| Insurance | \$849 | \$1,698 | \$1,698 | | \$1,698 | \$1,698 | | \$1,698 | \$5,943 |
| Staff Training | | \$100 | \$100 | | \$100 | \$100 | | \$100 | \$300 |
| Staff Travel-(Local & Out of Town) | \$59 | \$300 | \$300 | \$284 | \$584 | \$300 | \$350 | \$650 | \$1,593 |
| Rental of Equipment | | | | | | | | | |
| Consultants/Subcontractors | | | | | | | | | |
| Other | | | | | | | | | |
| Computer Related | | \$100 | \$100 | | \$100 | \$100 | \$100 | \$200 | \$400 |
| TOTAL OPERATING EXPENSES | \$1,728 | \$4,523 | \$5,057 | \$284 | \$5,341 | \$5,057 | \$563 | \$5,620 | \$17,212 |

HSA #3

**APPENDIX A-3 – SERVICES TO BE PROVIDED
MISSION NEIGHBORHOOD CENTERS
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: October 1, 2022**

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

| | |
|-------------------------|--|
| ADRC | An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options. |
| Adult with a Disability | Person 18 years of age or older living with a disability |
| CARBON | Contracts Administration, Reporting and Billing On Line System |
| Caregiver | An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver. |
| City | City and County of San Francisco, a municipal corporation |
| 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. |
| Follow-Up | To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made. |

| | |
|--------------------|---|
| 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. |
| HSA | San Francisco Human Services Agency |
| LGBTQ+ | An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary. |
| 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 clients 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. |
| Senior/Older Adult | Person who is 60 years of age or older |

III. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

The location for Mission Neighborhood Center is 362 Capp Street, San Francisco CA 94110. Hours of operation are from 9:00am-12:30pm and 1:00pm-5:00pm, Monday to Saturday.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.
- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.
- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.

- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **3-5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Mission Neighborhood Centers ADRC:

- Will serve the following unduplicated older adults:
 - 600 in FY 20/21
 - 1750 in FY 21/22
 - 2750 in FY 22/23-FY23/24
- Will serve the following unduplicated adults with disabilities:
 - 60 in FY 20/21
 - 200 in FY 21/22
 - 275 in FY 22/23-FY23/24
- Will provide the following units of information and referral services:
 - 1200 in FY 20/21
 - 2100 in FY 21/22
 - 3500 in FY 22/23-FY23/24
- Will provide the following service units of assistance:
 - 1100 in FY 20/21
 - 1900 in FY 21/22
 - 3200 in FY 22/23-FY23/24
- Will provide the following units of follow-up services:
 - 175 in FY 20/21
 - 425 in FY 21/22
 - 600 in FY 22/23-FY23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs.

- Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. 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.
- G. 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:

| | |
|---|-----------------------------|
| Sara Hofverberg | Tara Alvarez |
| Program Analyst | Senior Contract Manager |
| Department of Disability and Aging Services (DAS) | Human Services Agency (HSA) |
| Sara.Hofverberg@SFgov.org | Tara.Alvarez@SFgov.org |

IX. Monitoring Activities

- A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all 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 V and VI.

- 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**

| Name | | | | | | | | | Term |
|--|------------------------------------|------------------|------------------|-----------------|------------------|------------------|-----------------|------------------|-----------------------|
| Mission Neighborhood Centers, Inc. | | | | | | | | | 1/1/21-6/30/24 |
| (Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/> | | | | | | | | | |
| If modification, Effective Date of Mod: 10/1/2022 No. of Mod: 3 | | | | | | | | | |
| Program: ADRC | | | | | | | | | |
| Budget Reference Page No.(s) | | | | | | | | | |
| | | | | (Modification) | | | (Modification) | | Total |
| Program Term | 1/1/21-6/30/21 | 7/1/21-6/30/22 | 7/1/22-6/30/23 | 10/1/22-6/30/23 | 7/1/22-6/30/23 | 7/1/23-6/30/24 | 7/1/23-6/30/24 | 7/1/23-6/30/24 | 1/1/21-6/30/24 |
| Expenditures | | | | | | | | | |
| Salaries & Benefits | \$43,274 | \$153,157 | \$179,325 | \$60,152 | \$239,477 | \$178,833 | \$55,947 | \$234,780 | \$670,688 |
| Operating Expenses | \$9,997 | \$27,953 | \$1,784 | \$11,441 | \$13,225 | \$2,276 | \$3,472 | \$5,748 | \$56,923 |
| Subtotal | \$53,271 | \$181,110 | \$181,109 | \$71,593 | \$252,702 | \$181,109 | \$59,419 | \$240,528 | \$727,611 |
| Indirect Percentage (%) | 15% | 15% | 15% | 15% | 15% | 15% | 15% | 15% | 15% |
| Indirect Cost (Line 16 X Line 15) | \$7,991 | \$27,166 | \$27,166 | \$10,738 | \$37,904 | \$27,166 | \$8,912 | \$36,079 | \$109,141 |
| Subcontractor/Capital Expenditures | | | | | | | | | |
| Total Expenditures | \$61,262 | \$208,276 | \$208,276 | \$82,331 | \$290,607 | \$208,276 | \$68,331 | \$276,607 | \$836,752 |
| HSA Revenues | | | | | | | | | |
| General Fund | \$61,262 | \$111,842 | \$111,843 | | \$111,843 | \$111,843 | | \$111,843 | \$396,790 |
| 20/21 CODB | | \$2,988 | \$2,988 | | \$2,988 | \$2,988 | | \$2,988 | \$8,964 |
| 21/22 CODB | | \$3,445 | \$3,445 | | \$3,445 | \$3,445 | | \$3,445 | \$10,335 |
| 21/22 Addback | | \$90,000 | \$90,000 | | \$90,000 | \$90,000 | | \$90,000 | \$270,000 |
| 22/23 Addback | | | | \$74,000 | \$74,000 | | \$60,000 | \$60,000 | \$134,000 |
| 22/23 CODB | | | | \$8,331 | \$8,331 | | \$8,331 | \$8,331 | \$16,662 |
| TOTAL HSA REVENUES | \$61,262 | \$208,276 | \$208,276 | \$82,331 | \$290,607 | \$208,276 | \$68,331 | \$276,607 | \$836,752 |
| Other Revenues | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| Total Revenues | | \$208,276 | \$208,276 | \$82,331 | \$290,607 | \$208,276 | \$68,331 | \$276,607 | \$836,752 |
| Full Time Equivalent (FTE) | 3.53 | 3.53 | | | 2.52 | | | 3.53 | |
| Prepared by: Aurora Alvarado | Telephone No.: 415.206.7750 | | | | | | | | |
| HSA-CO Review Signature: | | | | | | | | | |
| HSA #1 | | | | | | | | | 10/1/2022 |

Salaries & Benefits Detail

| POSITION TITLE | Agency Totals | | HSA Program | | 1/1/21-6/30/21 | 7/1/21-6/30/22 | 7/1/22-6/30/23 | (Modification) 10/1/22-6/30/23 | 7/1/22-6/30/23 | 7/1/23-6/30/24 | (Modification) 7/1/23-6/30/24 | 7/1/23-6/30/24 | Total 1/1/21-6/30/24 |
|--------------------------------------|---------------------------------|-----------------|--------------------------------|-----------------|-----------------|------------------|------------------|-----------------------------------|------------------|------------------|----------------------------------|------------------|-------------------------|
| | Annual Full Time Salary for FTE | Total FTE | % FTE funded by HSA (Max 100%) | Adjusted FTE | DAS | DAS | DAS | DAS | DAS | DAS | DAS | DAS | DAS |
| | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary | Budgeted Salary |
| Community Resource Specialist | \$52,000 | 1.00 | 75% | 0.75 | \$24,781 | \$46,888 | \$36,750 | \$47 | \$36,797 | \$46,426 | (\$3,539) | \$42,887 | \$151,353 |
| I & A Specialist (English/Spanish) | \$52,000 | 1.00 | 75% | 0.75 | \$8,883 | \$36,942 | \$37,791 | (\$501) | \$37,290 | \$38,220 | \$780 | \$39,000 | \$122,115 |
| I & A Specialist (English/Chinese) | \$52,000 | 1.00 | 100% | 1.00 | | \$17,252 | \$31,807 | \$21,563 | \$53,370 | \$50,960 | \$2,648 | \$53,608 | \$124,230 |
| I & A Specialist (English/Russian) | \$52,000 | 1.00 | 95% | 0.95 | | \$16,573 | \$25,938 | \$23,369 | \$49,307 | | \$40,040 | \$40,040 | \$105,920 |
| Program Director | \$97,938 | 1.00 | 1% | 0.01 | \$385 | \$1,354 | \$1,375 | (\$99) | \$1,276 | \$1,959 | (\$643) | \$1,316 | \$4,331 |
| Center Manager | \$75,000 | 1.00 | 7% | 0.07 | | | \$4,282 | \$1,298 | \$5,580 | | \$3,750 | \$3,750 | \$9,330 |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| TOTALS | \$380,938 | 6.00 | 353% | 3.53 | \$34,049 | \$119,009 | \$137,943 | \$45,677 | \$183,620 | 137,564 | \$43,036 | \$180,600 | \$517,278 |
| FRINGE BENEFIT RATE | 30% | | | | | | | | | | | | |
| EMPLOYEE FRINGE BENEFITS | \$114,281 | | | | \$9,225 | \$34,147 | \$41,383 | \$14,475 | \$55,858 | \$41,269 | \$12,911 | \$54,180 | \$153,410 |
| | | | | | | | | | | | | | |
| TOTAL SALARIES & BENEFITS | \$495,220 | | | | \$43,274 | \$153,157 | \$179,325 | \$60,152 | \$239,477 | \$178,833 | \$55,947 | \$234,780 | \$670,688 |

HSA #2

10/1/2022

Mission Neighborhood Centers, Inc.
 Program: ADRC

Operating Expense Detail

| Expenditure Category | 1/1/21-6/30/21 | 7/1/21-6/30/22 | (Modification) | | (Modification) | | | Total 1/1/21-6/30/24 | |
|---|----------------|-----------------|----------------|-----------------|-----------------|----------------|----------------|-------------------------|------------------|
| | | | 7/1/22-6/30/23 | 10/1/22-6/30/23 | 7/1/22-6/30/23 | 7/1/23-6/30/24 | 7/1/23-6/30/24 | | 7/1/23-6/30/24 |
| Rental of Property | | | | | | | | | |
| Utilities(Elec, Water, Gas, Phone, Garbage) | \$726 | \$3,000 | \$1,200 | | \$1,200 | \$1,200 | | \$1,200 | \$6,126 |
| Office Supplies, Postage | \$2,692 | \$3,000 | | \$1,200 | \$1,200 | | \$800 | \$800 | \$7,692 |
| Building Maintenance Supplies and Repair | \$2,557 | \$8,450 | | \$1,200 | \$1,200 | \$120 | \$428 | \$548 | \$12,755 |
| Printing and Reproduction | | \$500 | | \$600 | \$600 | | | | \$1,100 |
| Insurance | \$176 | \$500 | \$584 | \$41 | \$625 | \$740 | (\$140) | \$600 | \$1,901 |
| Staff Training | | \$3,100 | | \$5,000 | \$5,000 | | | | \$8,100 |
| Staff Transportation | | \$800 | | \$1,000 | \$1,000 | \$216 | \$784 | \$1,000 | \$2,800 |
| Program Supplies | | \$6,900 | | \$1,200 | \$1,200 | | \$1,000 | \$1,000 | \$9,100 |
| CONSULTANTS | | | | | | | | | |
| OTHER | | | | | | | | | |
| Covid-19 Emergency Response | \$1,469 | | | | | | | | \$1,469 |
| Fuel Maint & Repair | | \$450 | | | | | | | \$450 |
| Food Supplies | \$557 | \$653 | | \$1,200 | \$1,200 | | \$600 | \$600 | \$3,010 |
| Janitorial Supplies | \$1,820 | \$600 | | | | | | | \$2,420 |
| TOTAL OPERATING EXPENSE | <u>\$9,997</u> | <u>\$27,953</u> | <u>\$1,784</u> | <u>\$11,441</u> | <u>\$13,225</u> | <u>\$2,276</u> | <u>\$3,472</u> | <u>\$5,748</u> | <u>\$56,923</u> |
| HSA #3 | | | | | | | | | 10/1/2022 |

APPENDIX A-2 – SERVICES TO BE PROVIDED
SEQUOIA LIVING
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: October 1, 2022

I. Purpose of Grant

The grantee will provide information, assistance, and translation services at locations throughout San Francisco, providing crucial support for older people, adults with disabilities, and caregivers in the community.

II. Definitions

| | |
|-------------------------|--|
| ADRC | An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options. |
| Adult with a Disability | Person 18 years of age or older living with a disability |
| CARBON | Contracts Administration, Reporting and Billing On Line System |
| Caregiver | An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver. |
| City | City and County of San Francisco, a municipal corporation |
| 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. |
| Follow-Up | To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made. |

| | |
|--------------------|---|
| 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. |
| HSA | San Francisco Human Services Agency |
| LGBTQ+ | An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary. |
| 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 clients 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. |
| Senior/Older Adult | Person who is 60 years of age or older |

III. Target Population

Individuals 60 years of age or older, or individuals between 18 and 59 years of age who are living with a disability. In addition, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need:

Low-income

- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

Services will be provided at both San Francisco Senior Center locations: 481 O'Farrell Street, San Francisco, CA 94102 (Downtown Center), and 890 Beach Street, San Francisco, CA 94109 (Aquatic Park Center). Downtown Center hours of operation are Monday-Thursday 9am-4pm and Friday 9am-3:30pm. Aquatic Park Center hours are Monday-Friday 9am-4pm.

V. Description of Services

Aging and Disability Resource Centers (ADRC) provide information, assistance and translation services at locations throughout San Francisco. ADRCs provide crucial support for many older adults, adults with disabilities and caregivers in the community.

ADRC services are structured to ensure availability and accessibility in each of the supervisory districts, throughout San Francisco. For example, an ADRC on a boundary between districts may actually serve both. This may result in multiple ADRCs within a single district with none in a neighboring district. Grantees will be required to serve older adults and adults with disabilities of all ages in the specified supervisory district (or districts).

Services include:

- Client needs assessment;
- **Information and Referral** Linking individuals to services available in the community where client lives. Services include, but are not limited to adult day health care, caregiver assistance/support, community services, health and wellness, education, emergency preparedness, employment, financial assistance, government assistance, food/nutrition assistance, housing and shelter, in-home care, legal, safety, recreation, senior centers, translation, mental health, disability resources, vocational training, LGBTQ+ programs/services and transportation;
- **Assistance** Support of an individual to secure the services required to meet his or her needs. This may include filling out forms and applications, providing translation, contacting agencies on behalf of the client, completing on-line referrals, writing letters, making phone calls to set up or confirm appointments, escorting the client to service providers, and conferring with service providers to ensure the client's needs will be met.;
- **Follow-up** Ensuring the individual receives the services needed, and is aware of the opportunities available by contacting the client or service provider.

ADRC Grantee Responsibilities:

- Demonstrate an ability to serve both older adults and younger adults with disabilities and ensure that language needs in their catchment area can be met by their services.
- Designate at least one 1.0 FTE as the ADRC service provider.
- Be responsible for designating back-up staff who can offer services in case of any absence.
- Develop and demonstrate targeted outreach to adults with disabilities.
- Conduct outreach through presentations and participation in events to spread awareness of both ADRC and DAS services. Work with Citywide ADRC Coordinator in developing and scheduling outreach events.
- Collaborate with Citywide ADRC Coordinator, DAS analyst, and Integrated Intake Hub at 2 Gough St on efforts to meet California Department of Aging ADRC operations criteria.

- Develop partnerships with other organizations working within the district to ensure a robust network of service provision.
- Administer DAS client survey according to DAS direction and with a sample size of at least 25% of unduplicated clients.
- Ensure that ADRC staff has regular use of a computer with internet connection to enter in client data.
- All efforts shall be made to ensure that ADRC staff and clients have available a private room to meet that is accessible for those who use mobility devices, including those who use motorized wheelchairs and scooters.

VI. Service Objectives

- At least 10% of the clients served at each ADRC are younger adults with disabilities.
- At least 65% of individuals served who receive help in filling out applications for a financial benefit (e.g., Renter's/Home Owners Assistance, PG&E financial assistance programs, Medi-Cal, Medicare Part D) will successfully complete the application and note the outcome in SFGetCare.
- Conduct at least two training or outreach events per quarter to ensure community awareness of DAS and the ADRC program and services. Grantee may utilize outreach opportunities to supplement and maximize their proposed service goals.
- Total number of adults with disabilities served each year will increase by **5%** over the previous year. Statistics as provided by OCP staff.

On an annual basis, Sequoia Living ADRC:

- Will serve the following unduplicated older adults:
 - 892 in FY 20/21
 - 1785 in FY 21/22
 - 2720 in FY 22/23
 - 3220 in FY 23/24
- Will serve the following unduplicated adults with disabilities:
 - 90 in FY 20/21
 - 180 in FY 21/22
 - 292 in FY 22/23
 - 382 in FY 23/24
- Will provide the following units of information and referral services:
 - 1050 in FY 20/21
 - 2100 in FY 21/22
 - 3412 in FY 22/23
 - 4265 in FY 23/24

- Will provide the following service units of assistance:
 - 1050 in FY 20/21
 - 2100 in FY 21/22
 - 3412 in FY 22/23
 - 4265 in FY 23/24
- Will provide the following units of follow-up services:
 - 525 in FY 20/21
 - 1050 in FY 21/22
 - 1796 in FY 22/23
 - 2222 in FY 23/24

Each grantee will report the previous service objectives on a quarterly basis.

VII. Outcome Objectives

Outcome objectives are subject to change as the service delivery model is established and/or modified. Outcome objectives will be tracked using client surveys created by DAS, and distributed, collected, and recorded by Grantee.

- Clients develop new knowledge of aging and disability services that address their needs. Target: 85%
- Clients received the assistance they requested to complete an application for some type of benefit. Target: 85%
- ADRC services are provided in a respectful manner. Target: 95%

VIII. Reporting Requirements

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

A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.

B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.

C. Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:

<https://calmaa.hfa3.org/signin>

D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.

E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).

F. 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.

G. 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:

Sara Hofverberg
Program Analyst
Department of Disability & Aging Services (DAS)
Sara.Hofverberg@SFgov.org

Ella Lee
Senior Contract Manager
Human Services Agency (HSA)
Ella.Lee@SFgov.org

IX. Monitoring Activities

A. Program Monitoring: Program monitoring will include review of compliance 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 ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all 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 V and VI.

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**

| | | | | | | | | | | |
|--|------------------|------------------|------------------|-----------------|------------------|------------------|-----------------|------------------|------------------|--------------------------|
| Name Sequoia Living | | | | | | | | | | Term 1/1/21 - 6/30/24 |
| (Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/> | | | | | | | | | | |
| If modification, Effective Date of Mod. _____ No. of Mod. _____ | | | | | | | | | | |
| Program: Aging and Disability Resource Center | | | | | | | | | | |
| Budget Reference Page No.(s) _____ | | | | | | | | | | |
| Program Term | | | | | | | | | | |
| | 1/1/21 - 6/30/21 | 7/1/21 - 6/30/22 | 7/1/22 - 6/30/23 | | | 7/1/23 - 6/30/24 | | | Total | |
| | Revised | Revised | Budget | Modification | Revised | Budget | Modification | Revised | Budget | |
| Expenditures | | | | | | | | | | |
| Salaries & Benefits | \$56,541 | \$138,434 | \$214,418 | \$60,413 | \$274,831 | \$214,418 | \$60,413 | \$274,831 | \$744,637 | |
| Operating Expenses | \$16,968 | \$14,318 | \$110 | \$9,037 | \$9,147 | \$110 | \$9,037 | \$9,147 | \$49,580 | |
| Subtotal | \$73,509 | \$152,752 | \$214,528 | \$69,450 | \$283,978 | \$214,528 | \$69,450 | \$283,978 | \$794,217 | |
| Indirect Percentage (%) | 15% | 15% | 15% | | 15% | 15% | | 15% | 15% | |
| Indirect Cost (Line 16 X Line 15) | \$11,026 | \$22,913 | \$32,180 | \$10,418 | \$42,598 | \$32,180 | \$10,418 | \$42,598 | \$119,135 | |
| Subcontractor/Capital Expenditures | | | | | | | | | | |
| Total Expenditures | \$84,535 | \$175,665 | \$246,708 | \$79,868 | \$326,576 | \$246,708 | \$79,868 | \$326,576 | \$913,352 | |
| HSA Revenues | | | | | | | | | | |
| Federal | \$7,974 | \$15,949 | \$15,949 | | \$15,949 | \$15,949 | | \$15,949 | \$55,821 | |
| Local | \$71,770 | \$143,539 | \$143,539 | | \$143,539 | \$143,539 | | \$143,539 | \$502,387 | |
| CODB | \$4,791 | \$9,719 | \$9,719 | \$9,868 | \$19,587 | \$9,719 | \$9,868 | \$19,587 | \$53,684 | |
| OTO | | \$6,458 | \$77,501 | \$70,000 | \$147,501 | \$77,501 | \$70,000 | \$147,501 | \$301,460 | |
| TOTAL HSA REVENUES | \$84,535 | \$175,665 | \$246,708 | \$79,868 | \$326,576 | \$246,708 | \$79,868 | \$326,576 | \$913,352 | |
| Other Revenues | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| Total Revenues | | | | | | | | | | |
| Full Time Equivalent (FTE) | | | | | | | | | | |
| Prepared by: _____ Telephone No.: _____ | | | | | | | | | | |
| HSA-CO Review Signature: _____ | | | | | | | | | | |
| HSA #1 6/20/2018 | | | | | | | | | | |

Salaries & Benefits Detail

| POSITION TITLE | Agency Totals | | HSA Program | | 1/1/21 - 6/30/21 | | Agency Totals | | HSA Program | | 7/1/21 - 6/30/22 | | Agency Totals | | HSA Program | | 7/1/22 - 6/30/23 | | Agency Totals | | HSA Program | | 7/1/23 - 6/30/24 | | Total | |
|--------------------------------------|---------------------------------|-----------|--------------------------------|--------------|------------------|---------------------------------|---------------|--------------------------------|--------------|----------------|---------------------------------|-----------|--------------------------------|--------------|-----------------|--------------|------------------|---------------------------------|---------------|--------------------------------|--------------|-----------------|------------------|----------------|---------------|-----------------|
| | Annual Full Time Salary for FTE | Total FTE | % FTE funded by HSA (Max 100%) | Adjusted FTE | Revised Salary | Annual Full Time Salary for FTE | Total FTE | % FTE funded by HSA (Max 100%) | Adjusted FTE | Revised Salary | Annual Full Time Salary for FTE | Total FTE | % FTE funded by HSA (Max 100%) | Adjusted FTE | Budgeted Salary | Modification | Revised Salary | Annual Full Time Salary for FTE | Total FTE | % FTE funded by HSA (Max 100%) | Adjusted FTE | Budgeted Salary | Modification | Revised Salary | Budget Salary | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Service Coordinator-DT | \$48,797 | 0.63 | 100% | 0.63 | \$15,249 | \$48,797 | 1.00 | 100% | 1.00 | \$48,797 | \$53,789 | 1.00 | 100% | 1.00 | \$53,789 | | \$53,789 | \$53,789 | 1.00 | 100% | 1.00 | \$53,789 | | \$53,789 | \$53,789 | \$171,624 |
| Service Coordinator-AP | \$49,046 | 1.00 | 100% | 1.00 | \$24,523 | \$49,569 | 0.75 | 80% | 0.60 | \$29,847 | \$55,120 | 1.00 | 100% | 1.00 | \$55,120 | | \$55,120 | \$55,120 | 1.00 | 100% | 1.00 | \$55,120 | | \$55,120 | \$55,120 | \$164,610 |
| Service Coordinator- Tagalog | | | | - | | \$49,920 | 0.08 | 100% | 0.08 | \$4,160 | \$49,920 | 1.00 | 100% | 1.00 | \$49,920 | | \$49,920 | \$49,920 | 1.00 | 100% | 1.00 | \$49,920 | | \$49,920 | \$49,920 | \$104,000 |
| Director | \$84,406 | 0.05 | 100% | 0.05 | \$2,110 | \$89,128 | 0.01 | 100% | 0.01 | \$1,300 | \$100,000 | 1.00 | 10% | 0.08 | | \$7,917 | \$7,917 | \$100,000 | 1.00 | 10% | 0.08 | | \$7,917 | \$7,917 | \$7,917 | \$19,244 |
| Program Supervisor | | | | - | | \$74,381 | 0.71 | 35% | 0.25 | \$18,440 | | | | | | | | | | | | | | | | \$18,440 |
| Service Coordinator (Oct 2022 -) | | | | | | | | | | | \$52,000 | 1.00 | 100% | 0.71 | | \$36,833 | \$36,833 | \$52,000 | 1.00 | 100% | 0.71 | | \$36,833 | \$36,833 | \$36,833 | \$73,666 |
| TOTALS | \$182,249 | 1.68 | 300% | 1.68 | \$41,882 | \$311,795 | 2.56 | 415% | 1.95 | \$102,544 | \$310,829 | 5.00 | 410% | 3.79 | \$158,829 | \$44,750 | \$203,579 | \$310,829 | 5.00 | 410% | 3.79 | \$158,829 | \$44,750 | \$203,579 | \$551,584 | |
| FRINGE BENEFIT RATE | 35% | | | | 35% | | | | 35% | | | | 35% | | | | 35% | | | | 35% | | | | | |
| EMPLOYEE FRINGE BENEFITS | \$63,787 | | | | \$14,659 | \$109,128 | | | | \$35,890 | \$108,790 | | | | \$55,589 | \$15,663 | \$71,252 | \$108,790 | | | | \$55,589 | \$15,663 | \$71,252 | \$193,053 | |
| TOTAL SALARIES & BENEFITS | \$246,036 | | | | \$56,541 | \$420,923 | | | | \$138,434 | \$419,619 | | | | \$214,418 | \$60,413 | \$274,831 | \$419,619 | | | | \$214,418 | \$60,413 | \$274,831 | \$744,637 | |
| HSA #2 | | | | | | | | | | | | | | | | | | | | | | | | | | 620/2018 |

Sequoia Living
 Program: Aging and Disability Resource Center

Operating Expense Detail

| Expenditure Category | TERM | 7/1/22 - 6/30/23 | | | 7/1/23 - 6/30/24 | | | Total | | |
|---|------|------------------|------------------|--------|------------------|---------|--------|---------|--------------|------------------|
| | | 1/1/21 - 6/30/21 | 7/1/21 - 6/30/22 | Budget | Modification | Revised | Budget | | Modification | Revised |
| | | Revised | Revised | | | | | | Budget | |
| Rental of Property | | \$2,500 | \$4,100 | \$110 | \$3,970 | \$4,080 | \$110 | \$3,970 | \$4,080 | \$14,760 |
| Utilities(Elec, Water, Gas, Phone, Garbage) | | \$4,000 | \$5,000 | | \$5,067 | \$5,067 | | \$5,067 | \$5,067 | \$19,134 |
| Office Supplies, Postage | | \$5,468 | \$700 | | | | | | | \$6,168 |
| Building Maintenance Supplies and Repair | | | | | | | | | | |
| Printing and Reproduction | | | | | | | | | | |
| Insurance | | | | | | | | | | |
| Staff Training | | \$1,000 | | | | | | | | \$1,000 |
| Staff Travel-(Local & Out of Town) | | | | | | | | | | |
| Rental of Equipment | | | | | | | | | | |
| CONSULTANTS | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| OTHER | | | | | | | | | | |
| Pogram Supplies | | \$3,000 | | | | | | | | \$3,000 |
| PPE | | \$1,000 | | | | | | | | \$1,000 |
| Security | | | \$4,518 | | | | | | | \$4,518 |
| | | | | | | | | | | |
| TOTAL OPERATING EXPENSES | | \$16,968 | \$14,318 | \$110 | \$9,037 | \$9,147 | \$110 | \$9,037 | \$9,147 | \$49,580 |
| HSA #3 | | | | | | | | | | 6/20/2018 |