


City and County of San Francisco*London Breed, Mayor***Human Services Agency**
 Department of Human Services
 Department of Disability and Aging Services
 Office of Early Care and Education
*Trent Rhorer, Executive Director***MEMORANDUM**

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

FROM: CINDY KAUFFMAN, DEPUTY DIRECTOR
 ESPERANZA ZAPIEN, ACTING DIRECTOR OF CONTRACTS 

DATE: NOVEMBER 4, 2020

SUBJECT: NEW GRANT: **FAMILY CAREGIVER ALLIANCE (NON-PROFIT)** TO PROVIDE THE FAMILY CAREGIVER SUPPORT PROGRAM (FCSP)

GRANT TERM: 10/1/2020-6/30/2024

GRANT AMOUNT:	<u>New</u>	<u>Contingency</u>	<u>Total</u>
	\$3,156,553	\$315,655	\$3,472,208

ANNUAL AMOUNT	<u>FY20/21</u>	<u>FY21/22</u>	<u>FY22/23</u>	<u>FY23/24</u>
	\$791,311	\$788,414	\$788,414	\$788,414

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$1,284,447		\$1,872,106	\$315,655	\$3,472,208
PERCENTAGE:	41%		59%		100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into a new grant agreement with Family Caregiver Alliance (FCA) for the period of October 1, 2020 through June 30, 2024, in an amount of \$3,156,553, plus a 10% contingency for a total amount not to exceed \$3,472,208. The purpose of the grant is to provide family caregiver support programming to San Francisco residents who are informal caregivers.

Background

The Family Caregiver Support Program (FCSP) is a program created as Title III-E of the Older Americans Act. The Administration on Aging administers the program at the Federal level, and the California Department of Aging and the San Francisco Department of Disability and Aging Services (DAS) administers the program at the state and county levels, respectively. The service design of the FCSP is to promote an effective caregiver support system by improving both caregiver's and care recipient's well-being, increase public support for family care and support caregivers by formal and informal community support structures. Families are the mainstay underpinning long-term care (LTC) for older persons in the United States.

Services to be Provided

Grantee provides assistance to San Francisco residents age 18 years or older who are caring for an adult age 60 years or older; or individuals of any age with Alzheimer's disease or related disorder with neurologic and organic brain dysfunction. Services provided by Grantee, Family Caregiver Alliance, include information to caregivers about available services, assistance to caregivers in gaining access to services, individual counseling, caregiver support groups, caregiver training to assist the caregivers in making decisions and solving problems relating to their care giving roles, temporary respite care to enable caregivers to be temporarily relieved from their care giving responsibilities, community outreach to make the public aware of their services, and supplemental services to complement the care provided by caregivers.

Family Caregiver Alliance will also work in collaboration and partnerships to help reach San Francisco's diverse population. They will do this by subcontracting with three multicultural/culturally sensitive San Francisco community-based organizations:

1. **Self Help for the Elderly (SHE)**, a long-established San Francisco based non-profit works to promote independence, dignity, and self-worth for senior adults and their families to meet the unique needs of the Chinese and A/PI communities. For this grant SHE will facilitate the delivery of caregiver information, access, support and supplemental caregiver services targeted to low-income residents.
2. **Kimochi**, a long established San Francisco based non-profit organization, effectively addresses the unique needs of Japanese and Korean seniors and their caregivers who have limited resources and options available to them. For this grant, Kimochi will provide Family Caregiver Support services including bi-lingual caregiver education classes independently and co-lead with FCA, bi-lingual caregiver support groups, interpretations/translation assistance and counseling.
3. **Stepping Stone Adult Day Health** a long established San Francisco based non-profit organization serving LGBTQ+ seniors and adults with disabilities in an adult day health setting, located South of Market. For this grant, Stepping Stone Adult Day Health will provide public information on caregiving, caregiver assessment, and caregiver counseling

For fiscal year 2020-2021, the program will incorporate \$200,000 in Coronavirus Aid, Relief, and Economic Security Act, also known as the CARES Act funding. The grantee will use this funding to increase total service unit offerings in 20/21 by 39%. The increase is in the areas of Public Information on Caregiving, Community Education on Caregiving, Caregiver Outreach, Caregiver Interpretation/Translation, Caregiver Assessment, Caregiver Counseling, Caregiver Case Management, and Caregiver Respite In-Home Personal Care.

Selection

Grantee was selected through Request for Proposals #875, which was competitively bid in January 2020.

Funding

Funding for this grant is provided by Federal and County General Funds.

Attachments

Appendix A, Scope of Services

Appendix B, Budget-FCSP

Appendix B1, Budget-CARES 20/21

APPENDIX A: SERVICES TO BE PROVIDED BY GRANTEE

Family Caregiver Alliance

FAMILY CAREGIVER SUPPORT PROGRAM

October 1, 2020 to June 30, 2024

I. Purpose:

The purpose of this grant is to assist San Francisco residents who are caregivers of older adults (60 years of age or older) or under 60 years with a diagnosis of Alzheimer’s disease or related disorder with neurological and organic brain dysfunction by providing the caregiver a range of support resources such as caregiver assessment, educational material and groups, respite, individual and group counseling, case management, translation services, and information and assistance.

II. Definitions:

CA Getcare	A web-based application developed for DAS staff and its service providers to maintain and track services provided and consumers served citywide. Minimum computer requirements to access the application includes Windows 2000, Internet Explorer 6.0, and Adobe Acrobat 5.0
Care Receiver –Older Adults	An older individual (60 years of age or older) or an individual (of any age) with Alzheimer’s disease or related disorder with neurological and organic brain dysfunction. [Section 302(3) of the OAA]
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.
Caregiver Support	To provide individual counseling, organization of support group and caregiver training to caregivers to assist the caregiver in making decisions and solving problems relating to their care giving roles.
DAS	Department of Disability and Aging Services of the San Francisco Human Services Agency
Division 21-100	Division 21-100 Nondiscrimination in State and Federally Assisted Programs require that grantees administer their program(s) in a nondiscriminatory manner and in compliance with civil rights obligations and to accommodate non-English-speaking or limited-English-proficient individuals and individuals with disabilities or impairments. At a minimum, grantee must <i>provide</i> the following: procedures for informing clients of their civil rights; policies and procedures for handling complaints

	<p>filed with or against a Contractor/Grantee; policies and procedures that ensure Contractors/Grantees accommodate individuals with hearing impairments, visual impairments and other disabilities; policies and procedures that ensure that Contractors/Grantees provide appropriate language services, including a breakdown of bilingual/interpreter staff and a description of how written information is communicated to non-English speaking clients; and policies and procedures for ensuring that Contractor staff are adequately trained in the requirements of Division 21</p> <p>http://www.dss.cahwnet.gov/getinfo/pdf/3cfcman.pdf</p>
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 to others.
Grantee	Family Caregiver Alliance
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.
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.
OCP	Office of Community Partnerships, a unit within the Department of Disability and Aging Services of the San Francisco Human Services Agency.

Program Requirements	Program requirements found in the Older Americans Act (OOA), Title III, Part E, Sections 371 through 374. California Department of Aging Program Memorandum PM 08-03 (P).
Purchaser	Director of Purchasing of the City and County of San Francisco, or designated agent.
SOGI	Sexual Orientation and Gender Identity; Ordinance No. 159-16 amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9.).

III. Target Population:

Services must target eligible caregivers who are members of one or more of the following target groups that have been identified as demonstrating the greatest economic and social need:

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

IV. Eligibility for Services:

- 1) Family caregivers of older adults must be:
 - 18 years of age or older and
 - Provide care to those who live in their own homes, SRO hotels, or public housing within the boundaries of San Francisco County.
- 2) Care receivers must be:
 - Age 60 years or older or
 - Individuals of any age with Alzheimer's disease or related disorder with neurologic and organic brain dysfunction.

V. Location and Time of Services:

The Family Caregiver Support Program (FCSP) services are housed at 101 Montgomery St, suite 2150. Administrative offices are open during regular business hours. Services are provided throughout San Francisco at various times, seven days a week.

VI. Description of Services / Service Units:

Service categories and the corresponding service units that will be funded for the Family Caregiver Support Program are listed below. Service areas, specific services, and units of measure have been established and defined by the Older Americans Act and the California Department of Aging. All possible categories of services are listed for the purpose of a comprehensive overview of the program, however, Grantee is not required to provide services in all service categories. Actual contracted service levels are listed in **bold** in corresponding service areas. Contracted service units are to be completed on an annual basis.

In order to provide a wide range of care giving services to a diverse population of San Francisco residents, Family Caregiver Alliance sub-contracts with three San Francisco-based non-profit organizations for service provision. These organizations are Kimochi, Self-Help for the Elderly, and Stepping Stone Adult Day Health. Below is a key to each agency's acronym as described throughout the service descriptions section:

- Family Caregiver Alliance: **FCA**
- Kimochi, Inc.: **KI**
- Self-Help for the Elderly: **SHE**
- Stepping Stone: **SS**

Information Services (Caring For Elderly):

Information Services means the provision of public information on caregiving and/or community education on caregiving, including information about available services.

- Public Information on Caregiving (Caring for Elderly) An FCSP Information Service designed to provide information about available FCSP and other caregiver support resources and services by disseminating publications, conducting media campaigns, and maintaining electronic information systems (e.g., quarterly newsletter). **UNIT: 15 FCA//2 SHE//4 SS = 21 activities**
- Community Education on Caregiving (Caring for Elderly) An FCSP Information Service designed to educate groups of current or potential caregivers and those who may provide them with assistance about available FCSP and other caregiver support resources and services (e.g., booth at a health fair). **UNIT: 20 FCA = 20 activities**

Access Assistance (Caring For Elderly):

Access Assistance is the provision of caregiver outreach, caregiver information and assistance, and caregiver interpretation/translation services in order to link caregivers to the opportunities and services that are available. **UNIT: 1 contact**

- Caregiver Outreach (Caring for Elderly) An FCSP Access Assistance service involving interventions (one-on-one contacts with individuals) initiated by an agency or provider

for the purpose of identifying caregivers and encouraging their use of existing caregiver support services (e.g., Caregiver InfoVan staff contacts outside of local market) **UNIT: 20 FCA/125 SHE = 145 contacts**

- Caregiver Information and Assistance (Caring for Elderly) An FCSP Access Assistance service that: (A) provides caregivers with information on services available within the communities, including caregiving information related to assistive technology and caring for older individuals at risk of institutional placement; (B) links caregivers to the services and opportunities that are available within the communities; (C) to the maximum extent practicable, establishes adequate follow-up procedures (caregiver may remain anonymous & refuse follow-up contact). **UNIT: 182 FCA/ 110 SHE = 292 contacts**
- Caregiver Interpretation/Translation (Caring for Elderly) An FCSP Access Assistance service for the provision of bilingual communication assistance to a caregiver in order to access assistance and receive support for their caregiving responsibilities (e.g., staff interpreting dialogue between caregiver and care consultant staff translating an elder's prescription drug label for their caregiver). **UNIT: 20 FCA/200 KI/ 75 SHE = 295 contacts**
- Caregiver Legal Resources (Caring for Elderly) An FCSP Access Assistance service involving one-to-one guidance provided by an attorney (or person under the supervision of an attorney) in the use of legal resources and services when assisting a caregiver with caregiving related legal issues. **UNIT: 36 FCA = 36 contacts**

Support Services (Caring For Elderly):

Support Services is the provision of caregiver assessment, caregiver counseling, caregiver peer counseling, caregiver support groups, caregiver training, and (if necessary) caregiver case management. Unit: 1 hour

- Caregiver Assessment (Caring for Elderly) An FCSP Support Service conducted by persons trained and experienced in the skills required to deliver the service that should result in a plan that includes emergency back-up provisions and is periodically updated; and will explore options and courses of action for caregivers by identifying their, (A) willingness to provide care; (B) duration and care frequency preferences; (C) caregiving abilities; (D) physical health, psychological, social support, and training needs; (E) financial resources relative for caregiving; and (F) strengths and weaknesses within the immediate caregiving environment and (caregiver's) extended informal support system. **UNIT: 340 FCA/15 KI/ 125 SHE/12 SS = 477 hours**
- Caregiver Counseling (Caring for Elderly) An FCSP Support Service provided to a caregiver by a person appropriately trained and experienced in the skills required to deliver the level of support needed for stress, depression, and loss as a result of caregiving responsibilities. This service (A) may involve their informal support system; (B) may be individual direct sessions and/or telephone consultations, and (C) may

address caregiving related financial and long-term care placement responsibilities.

UNIT: 260 FCA/ 325 KI//100 SHE / 80 SS = 765 hours

- Caregiver Peer Counseling (Caring for Elderly) An FCSP Support Service provided by experienced volunteers on the condition that appropriate training and qualified supervision protocols are in place. Not provided under this grant.
- Caregiver Support Group (Caring for Elderly) An FCSP Support Service provided to a group of 3-12 caregivers that is led by a competent facilitator; conducted at least monthly within a supportive setting or via a controlled access, moderated online or teleconference approach; for the purpose of sharing experiences and ideas to ease the stress of caregiving and to improve decision-making and problem-solving skills related to their caregiving responsibilities. **UNIT: 210 FCA/300 KI/300 SS/45= 555 hours**
- Caregiver Training (Caring for Elderly) An FCSP Support Service consisting of workshops or one-on-one individually tailored sessions, conducted either in person or electronically by a skilled and knowledgeable individual, to assist caregivers in developing the skills and gaining the knowledge necessary to fulfill their caregiving responsibilities; and address the areas of health, nutrition, and financial literacy. **UNIT: 130 FCA/150 KI/ / 75 SHE – 355 hours**
- Caregiver Case Management (Caring for Elderly) An FCSP Support Service provided by a person who is trained and experienced in the skills that are required to coordinate and monitor the provision of formal caregiver-related services in circumstances where caregivers are experiencing diminishing capacities due to mental impairment or temporary severe stress and/or depression. **UNIT: 50 FCA / 110 SHE = 160 hours**

Respite Care (Caring For Elderly):

Respite Care is a brief period of relief or rest from caregiving responsibilities, and is provided to caregivers on an intermittent, occasional, and/or emergency basis in a manner that responds to the individual needs and preferences of the caregivers and their care receiver rather than a pre-established set amount offered on a “first come, first served” waiting list basis. Respite Care shall be provided only to a caregiver of a care receiver having two or more activities of daily living limitations or a cognitive impairment, or to a caregiver who is the grandparent or older adult relative caring for a child. Examples of temporary respite care:

Intermittent: Time off a few hours once a week for a limited time to give the caregiver a planned or unscheduled break.

Occasional: Time off for the caregiver to attend a special event.

Emergency: Extended break to address an intervening circumstance, such as caregiver emotional stress or hospitalization and recovery.

UNIT: 1 hour (time includes service provision and related travel).

- Caregiver Respite In-Home Supervision (Caring for Elderly) An FCSP Respite Care service that includes the provision of care receiver day and/or overnight supervision and friendly visiting by an appropriately skilled provider or volunteer in order to prevent wandering and health or safety incidents. UNIT OF MEASURE: 1 hour. Not provided under this grant.
- Caregiver Respite Homemaker Assistance (Caring for Elderly) An FCSP Respite Care service that includes the provision of care receiver assistance with meal preparation, medication management, using the phone, and or light housework (along with care receiver supervision) by an appropriately skilled provider or volunteer. UNIT OF MEASURE: 1 hour. Not provided under this grant.
- Caregiver Respite In-Home Personal Care (Caring for Elderly) An FCSP Respite Care service that includes the provision of care receiver assistance with eating, bathing, toileting, transferring, and/or dressing (along with care receiver supervision and related homemaker assistance) by an appropriately skilled provider. **UNIT OF MEASURE: 960 FCA=960 hours**
- Caregiver Respite Home Chore (Caring for Elderly) An FCSP Respite Care service that includes an appropriately skilled provider or volunteer assisting a caregiver with heavy housework, yard work, and/or sidewalk and other routine home maintenance (but not structural repairs) associated with caregiving responsibilities. UNIT: 1 hour. Not provided under this grant.
- Caregiver Respite Out-of-Home Day Care (Caring for Elderly) An FCSP Respite Care service where the care receiver attends a supervised/protective, congregate setting during some portion of a day, and includes access to social and recreational activities. UNIT OF MEASURE: 1 hour. Not provided under this grant.
- Caregiver Respite Out-of-Home Overnight (Caring for Elderly) An FCSP Respite Care service where the care receiver is temporarily placed in a supervised/protective, residential setting for one or more nights, and may include access to nursing and personal care. UNIT OF MEASURE: 1 hour. Not provided under this grant.

Supplemental Services (Caring For Elderly)

Supplemental Services means caregiver-centered assistance offered on a limited basis to support and strengthen the caregiving efforts. Supplemental Services shall be provided only to a caregiver of a care receiver having two or more activities of daily living limitations or a cognitive impairment, or to a caregiver who is the grandparent or older adult relative caring for a child. UNIT: 1 device is 1 occurrence

- Assistive Devices for Caregiving (Caring for Elderly) An FCSP Supplemental Service involving the purchase, rental and/or service fee of any equipment or product system (ranging from a lift chair or bathtub transfer bench to an electronic pill dispenser or emergency alert fall prevention device) in order to facilitate and fulfill caregiving responsibilities. **UNIT: 5 SHE = 5 occurrences**
- Home Adaptations for Caregiving (Caring for Elderly) An FCSP Supplemental Service that makes any minor or major physical change to the home (ranging from installation of grab bars or replacement of door handles to construction of an entrance ramp or roll-in shower) in order to fulfill caregiving responsibilities. UNIT: 1 modification is 1 occurrence. Not provided under this grant.
- Caregiving Services Registry (Caring for Elderly) An FCSP Supplemental Service that recruits, screens, and maintains a listing of dependable, qualified self-employed homemaker or respite care workers who may be matched with caregivers willing to utilize personal resources to pay for assistance with their caregiving responsibilities. Both the caregiver and self-employed worker will be: (A) advised about appropriate compensation and workplace performance expectations; and (B) provided with follow-up to ensure the match is functioning effectively. **UNIT: 75 KI = 75 occurrences**
- Caregiving Emergency Cash/Material Aid (Caring for Elderly) An FCSP Supplemental Service that arranges for and provides assistance to caregivers in the form of commodities, surplus food, emergency cash, transit passes, meals, and vouchers that will help meet identified needs associated with an individual caregiver's responsibilities. Unit definition: one assistance for one caregiver equals one occurrence. **UNIT: FCA 10 = 10 occurrences**

CARES Act October 1, 2020-September 30, 2021

As a result of the CARES Act, additional funding to meet short-term needs for family caregivers affected by COVID-19, the grantee will provide the service units below, in addition to the FCSP contract.

- Caregiver Assessment: 30 hours
- Caregiver Counseling: 100 hours
- Caregiver Case Management: 75 hours
- Respite: In-Home Personal Care: 1190 hours
- Caregiver Outreach: 100 Contacts
- Caregiver Interpretation/Translation: 40 Contacts
- Public Information on Caregiving: 65 Activities (15 tied to sharing translations and updates of fact sheets, videos, etc)
- Community Education on Caregiving: 30 Activities

VII. Outcome Objectives:

1. Program participants responding to the annual consumer satisfaction survey will indicate that they received the services offered by the agency and the services were appropriate, relevant, and adequate.
Target: 75%
2. Participants responding to the annual consumer satisfaction survey will report reduced stress and an increased sense of feeling cared about/valued since receiving program services.
Target: 75%
3. Program participants responding to the annual consumer satisfaction survey will indicate they learned of new services related to caregiving that they were not previously aware of.
Target: 75%
4. Program participants report they are satisfied with the respite care services provided.
Target: 85%
5. Program participants report that program participation delayed institutionalization for the care receiver.
Grantee will provide results of delayed institutionalizations of care receivers.

VIII. Reporting Requirements:

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

- A. Grantee will enter into CA-GetCare all the units of service in the Service Recording Tool and data for client-level service reporting by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Billing and Reporting Online (CARBON) system for each unit of service delivered during the reporting period for each service listed in Section VI of the Services to be provided.
- C. 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.

- D. Grantee will provide annual consumer satisfaction survey results to OCP by March 15 each grant year, with at least thirty-five percent (35%) of caregiver participants responding to the annual consumer satisfaction survey.
- E. Grantee will provide other reports as requested.
- F. Grantee shall develop and deliver an annual summary report of SOGI data collected in the year as requested by DAS/HSA. The due date for submitting the annual summary report is July 10th.
- G. Grantee will assure that services delivered are consistent with professional standards for this service.
- H. Pursuant to California Department of Aging Requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies “Focal Points” which are designed to help older adults connect to services throughout the City. These Focal Points are:

Designated Community Focal Points		
Name	Address	Phone
Western Addition Senior Center	1390 1/2 Turk St, San Francisco, 94115	415-921-7805
Bayview Senior Connections	5600 3rd St, San Francisco, 94124	415-647-5353
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132	415-335-5558
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121	415-404-2938
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131	415-550-2221
Openhouse	1800 Market St, San Francisco, 94102	415-347-8509
SF Senior Center (SFSC)	481 O’Farrell St, San Francisco, 94102	415-202-2983
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109	415-202-2983
South Sunset Senior Center (SHE)	2601 40th Ave , San Francisco, 94116	415-566-2845
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133	415-677-7585
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108	415-438-9804
Toolworks	25 Kearny St, San Francisco, 94108	415-733-0990
DAAS Benefits and Services Hub	2 Gough St, San Francisco, 94103	415-355-6700

- K. Apart from the on-line reporting via CA GetCare and CARBON, and report 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:

Ofelia Trevino, Program Analyst
DAS, OCP
PO Box 7988
San Francisco, CA 94120
E-mail address: ofelia.trevino@sfgov.org

David Kashani
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: david.kashani@sfgov.org

IX. Monitoring Activities:

- A. Program Monitoring: Program monitoring will include review of 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; 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; and whether services are provided appropriately according to Sections VI and VII.
- 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, the current board roster and selected board minutes for compliance with the Sunshine Ordinance, and HIPAA compliance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	HUMAN SERVICES AGENCY BUDGET SUMMARY					
4						
5	Name		Term			
6	FAMILY CAREGIVER ALLIANCE		10/1/20-6/30/24			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
8	If modification, Effective Date of Mod.		No. of Mod.			
9	Program: Family Caregiver Support Program					
10	Budget Reference Page No.(s)					
11	Program Term	10/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/2023-6/30/24	Total
12	Expenditures					
13	Salaries & Benefits	\$268,436	\$357,911	\$357,911	\$357,911	\$1,342,169
14	Operating Expenses	\$150,263	\$200,349	\$200,349	\$200,349	\$751,310
15	Subtotal	\$418,699	\$558,260	\$558,260	\$558,260	\$2,093,479
16	Indirect Percentage (%)	9%	9%	9%	9%	9%
17	Indirect Cost (Line 16 X Line 15)	\$37,612	\$50,154	\$50,154	\$50,154	\$188,074
18	Capital/Subcontractor Expenditures	\$135,000	\$180,000	\$180,000	\$180,000	\$675,000
19	Total Expenditures	\$591,311	\$788,414	\$788,414	\$788,414	\$2,956,553
20	HSA Revenues					
21						
22	General Fund (43%)	\$256,890	\$342,519	\$342,519	\$342,519	\$1,284,447
23	CFDA 93.052 (57%)	\$334,421	\$445,895	\$445,895	\$445,895	\$1,672,106
24						
25	TOTAL HSA REVENUES	\$591,311	\$788,414	\$788,414	\$788,414	\$2,956,553
26	Other Revenues					
27						
28						
29						
30						
31	Total Revenues					\$2,956,553
32	Full Time Equivalent (FTE)					
34	Prepared by: Stephen Hu		Telephone No.: 415-434-3388		Date: 09/24/20	
35	HSA-CO Review Signature:					
36	HSA #1					

	A	B	C	D	E	F	G	H	I
1	Appendix B, Page 2								
2	Program: Family Caregiver Support Program								
3	(Same as Line 9 on HSA #1)								
4									
5	Salaries & Benefits Detail								
6									
7					10/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/2023-6/30/24	10/1/20-6/30/24
8		HSA Program							TOTAL
9	POSITION TITLE	New Salary	Total FTE	New FTE					Budgeted Salary
10	Director of CRC Services	\$88,000	100%	0.20	\$13,200	\$17,600	\$17,600	\$17,600	\$66,000
11	Family Consultant (Latino)	\$64,000	100%	0.23	\$11,040	\$14,720	\$14,720	\$14,720	\$55,200
12	Family Consultant	\$63,000	100%	0.30	\$14,175	\$18,900	\$18,900	\$18,900	\$70,875
13	Family Consultant	\$61,000	100%	0.35	\$16,013	\$21,350	\$21,350	\$21,350	\$80,063
14	Family Consultant	\$59,000	100%	0.35	\$15,488	\$20,650	\$20,650	\$20,650	\$77,438
15	Family Consultant	\$67,000	100%	0.02	\$1,005	\$1,340	\$1,340	\$1,340	\$5,025
16	Family Consultant	\$67,000	100%	0.02	\$1,005	\$1,340	\$1,340	\$1,340	\$5,025
17	Family Consultant	\$63,000	100%	0.02	\$945	\$1,260	\$1,260	\$1,260	\$4,725
18	Resource Outreach Coordinator (Intake)	\$48,000	100%	0.25	\$9,000	\$12,000	\$12,000	\$12,000	\$45,000
19	Education Coord	\$44,500	100%	0.25	\$8,344	\$11,125	\$11,125	\$11,125	\$41,719
20	Database/Fiscal Asst	\$44,500	100%	0.25	\$8,344	\$11,125	\$11,125	\$11,125	\$41,719
21	Act Mgr.Acct/Vouchered Svs	\$77,000	100%	0.21	\$12,128	\$16,170	\$16,170	\$16,170	\$60,638
22	Prog Acct /Vouchered Svs	\$59,000	100%	0.33	\$14,603	\$19,470	\$19,470	\$19,470	\$73,013
23	Operations Director	\$100,000	100%	0.18	\$13,500	\$18,000	\$18,000	\$18,000	\$67,500
24	Reception/Adm Asst(Intake Reception)	\$38,000	100%	0.25	\$7,125	\$9,500	\$9,500	\$9,500	\$35,625
25	Director of Communication	\$96,800	100%	0.26	\$18,876	\$25,168	\$25,168	\$25,168	\$94,380
26	Community Outreach Specialist	\$63,000	100%	0.30	\$14,175	\$18,900	\$18,900	\$18,900	\$70,875
27	Instructional Designer	\$68,250	100%	0.43	\$22,011	\$29,348	\$29,348	\$29,348	\$110,055
28	Sr Program Mgr (Exec Dir)	\$147,000	100%	0.05	\$5,513	\$7,350	\$7,350	\$7,350	\$27,563
29	TOTALS		19.00	4.25	\$206,490	\$275,316	\$275,316	\$275,316	\$1,032,438
30									
31	FRINGE BENEFIT RATE				30%	30%	30%	30%	30%
32	EMPLOYEE FRINGE BENEFITS				\$61,946	\$82,595	\$82,595	\$82,595	\$309,731
33									
34									
35	TOTAL SALARIES & BENEFITS				\$268,436	\$357,911	\$357,911	\$357,911	\$1,342,169
36	HSA #2								10/25/2016

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	Program: Family Caregiver Support Program												
4	(Same as Line 9 on HSA #1)												
5													
6	Operating Expense Detail												
7													
8													
9	<u>Expenditure Category</u>		<u>TERM</u>		<u>10/1/20-6/30/21</u>		<u>7/1/21-6/30/22</u>		<u>7/1/22-6/30/23</u>		<u>7/1/2023-6/30/24</u>		<u>TOTAL</u> <u>10/1/20-6/30/24</u>
10	Rental of Property				\$35,437		\$47,249		\$47,249		\$47,249		\$177,184
11	Telecommunications (Phones, Omlne Access, Web Services, Web Programming & Maint)				\$15,000		\$20,000		\$20,000		\$20,000		\$75,000
12	Office Supplies, Postage				\$8,250		\$11,000		\$11,000		\$11,000		\$41,250
13	Software Systems License				\$12,750		\$17,000		\$17,000		\$17,000		\$63,750
14	Printing and Reproduction				\$750		\$1,000		\$1,000		\$1,000		\$3,750
15	Insurance				\$2,250		\$3,000		\$3,000		\$3,000		\$11,250
16	Staff Training				\$750		\$1,000		\$1,000		\$1,000		\$3,750
17	Staff Travel-(Local & Out of Town)				\$750		\$1,000		\$1,000		\$1,000		\$3,750
18	Rental of Equipment				\$2,025		\$2,700		\$2,700		\$2,700		\$10,125
19													
20	CONSULTANTS												
21	Graphic Designer				\$6,250		\$8,333		\$8,333		\$8,333		\$31,249
22	Comm Consultant				\$12,500		\$16,667		\$16,667		\$16,667		\$62,501
23	Audit				\$4,500		\$6,000		\$6,000		\$6,000		\$22,500
24													
25	OTHER												
26	Respite				\$27,390		\$36,520		\$36,520		\$36,520		\$136,950
27	Legal Services				\$4,860		\$6,480		\$6,480		\$6,480		\$24,300
28	Caregiver Education Events				\$4,688		\$6,250		\$6,250		\$6,250		\$23,438
29	Publications & Translations				\$9,863		\$13,150		\$13,150		\$13,150		\$49,313
30	Computer Equipment (each under \$500)				\$2,250		\$3,000		\$3,000		\$3,000		\$11,250
31													
32													
33	TOTAL OPERATING EXPENSE				\$150,263		\$200,349		\$200,349		\$200,349		\$751,310
34	0.750006239												

	A	B	C	D	E	F	G
1	Appendix B, Page 4						
2							
3							
4	Program: Family Caregiver Support Program						
5	(Same as Line 9 on HSA #1)						
6	Program Expenditure Detail						
7	SUBCONTRACTORS		10/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/2023-6/30/24	10/1/20-6/30/24
8		Self Help for the Elderly	\$60,000	\$80,000	\$80,000	\$80,000	\$300,000
9		Kimochi	\$52,500	\$70,000	\$70,000	\$70,000	\$262,500
10		Stepping Stones	\$22,500	\$30,000	\$30,000	\$30,000	\$112,500
11							
12	TOTAL SUBCONTRACTOR COST		\$135,000	\$180,000	\$180,000	\$180,000	\$675,000
13							
14							
15	EQUIPMENT		TERM				10/1/20-6/30/24
16	No.	ITEM/DESCRIPTION					
17							
18							
19							
20	TOTAL EQUIPMENT COST						\$0
21							
22	R E M O D E L I N G						
23	Description:						10/1/20-6/30/24
24							
25							
26							
27	TOTAL REMODELING COST						\$0
28							
29	TOTAL CAPITAL/SUBCONTRACTOR EXPENDITURE		\$135,000	\$180,000	\$180,000	\$180,000	\$675,000
30							
31	HSA #4						10/25/2016

**HUMAN SERVICES AGENCY
SUBCONTRACTOR BUDGET SUMMARY**

Name					Term
Self-Help for the Elderly					10/1/20-6/30/24
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. No. of Mod.					
Program: FCSP Subcontract					
Budget Reference Page No.(s)					
Program Term	10/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/2023-6/30/24	Total
Expenditures					
Salaries & Benefits	\$56,579	\$75,438	\$75,438	\$75,438	\$282,893
Operating Expenses	\$3,422	\$4,562	\$4,562	\$4,562	\$17,108
Subtotal	\$60,000	\$80,000	\$80,000	\$80,000	\$300,000
Indirect Percentage (%)	0%	0%	0%	0%	0%
Indirect Cost (Line 16 X Line 15)	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$60,000	\$80,000	\$80,000	\$80,000	\$300,000
HSA Revenues					
FCA FCSP	\$60,000	\$80,000	\$80,000	\$80,000	\$300,000
TOTAL HSA REVENUES	\$60,000	\$80,000	\$80,000	\$80,000	\$300,000
Other Revenues					
Total Revenues	\$60,000	\$60,000	\$60,000	\$60,000	\$240,000
Full Time Equivalent (FTE)					
Prepared by: _____ Telephone No.: _____					
HSA-CO Review Signature: _____					
HSA #1 _____					

**HUMAN SERVICES AGENCY
SUBCONTRACTOR BUDGET SUMMARY**

Name Kimochi	Term 10/1/20-6/30/24
-----------------	-------------------------

(Check One) New Renewal Modification
 If modification, Effective Date of Mod. No. of Mod.

Program: FCSP Subcontract	10/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/2023-6/30/24	Total
Budget Reference Page No.(s)					
Expenditures					
Salaries & Benefits	\$45,659	\$60,879	\$60,879	\$60,879	\$228,296
Operating Expenses	\$6,841	\$9,121	\$9,121	\$9,121	\$34,204
Subtotal	\$52,500	\$70,000	\$70,000	\$70,000	\$262,500
Indirect Percentage (%)	\$0	\$0	\$0	\$0	\$0
Indirect Cost (Line 16 X Line 15)	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$52,500	\$70,000	\$70,000	\$70,000	\$262,500
HSA Revenues					
FCA FCSP	\$52,500	\$70,000	\$70,000	\$70,000	\$262,500
TOTAL HSA REVENUES	\$52,500	\$70,000	\$70,000	\$70,000	\$262,500
Other Revenues					
Total Revenues	\$52,500	\$70,000	\$70,000	\$70,000	\$262,500
Full Time Equivalent (FTE)					
Prepared by:	Telephone No.:				
HSA-CO Review Signature:	_____				
HSA #1	_____				

**HUMAN SERVICES AGENCY
SUBCONTRACTOR BUDGET SUMMARY**

Name		Term			
Stepping Stone		10/1/20-6/30/24			
(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>					
If modification, Effective Date of Mod. No. of Mod.					
Program: FCSP Subcontract					
Budget Reference Page No.(s)					
Program Term	10/1/20-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/2023-6/30/24	Total
Expenditures					
Salaries & Benefits	\$22,500	\$30,000	\$30,000	\$30,000	\$112,500
Operating Expenses	\$0	\$0	\$0	\$0	\$0
Subtotal	\$22,500	\$30,000	\$30,000	\$30,000	\$112,500
Indirect Percentage (%)	0%	\$0	\$0	\$0	\$0
Indirect Cost (Line 16 X Line 15)	\$0	\$0	\$0	\$0	\$0
Total Expenditures	\$22,500	\$30,000	\$30,000	\$30,000	\$112,500
HSA Revenues					
FCA FCSP	\$22,500	\$30,000	\$30,000	\$30,000	\$112,500
TOTAL HSA REVENUES	\$22,500	\$30,000	\$30,000	\$30,000	\$112,500
Other Revenues					
Total Revenues	\$22,500	\$30,000	\$30,000	\$30,000	\$112,500
Full Time Equivalent (FTE)					
Prepared by:	Telephone No.:				
HSA-CO Review Signature:	_____				
HSA #1					

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	A	B	C
1	Appendix B1, Page 1		
2			
3	HUMAN SERVICES AGENCY BUDGET SUMMARY		
4			
5	Name	Term	
6	Family Caregiver Alliance	10/1/20-6/30/21	
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>		
8	If modification, Effective Date of Mod. No. of Mod.		
9	Program: Family Caregiver Support Program - Cares Act		
10	Budget Reference Page No.(s)		
11	Program Term	10/1/20-6/30/21	Total
12	Expenditures		
13	Salaries & Benefits	\$103,295	\$103,295
14	Operating Expenses	\$74,336	\$74,336
15	Subtotal	\$177,631	\$177,631
16	Indirect Percentage (%) (max 10%)	7%	7%
17	Indirect Cost (Line 16 X Line 15)	\$12,369	\$12,369
18	Capital/Subcontractor Expenditures	\$10,000	\$10,000
19	Total Expenditures	\$200,000	\$200,000
20	HSA Revenues		
21			
22	Cares Act (Federal 100%)	\$200,000	\$200,000
23			
24			
25			
26			
27			
28	TOTAL HSA REVENUES	\$200,000	\$200,000
29	Other Revenues		
30			
31			
32			
33			
34			
35	Total Revenues	\$200,000	\$200,000
36	Full Time Equivalent (FTE)	1.23	1.23
38	Prepared by:	Telephone No.:	Date:
39	HSA-CO Review Signature: _____		
40	HSA #1	1/23/2020	

	A	B	C	D	E	F	G
1	Appendix B1, Page 2						
2	Program: Family Caregiver Support Program - Cares Act						
3	(Same as Line 9 on HSA #1)						
4	Salaries & Benefits Detail						
5							
6	10/1/20-6/30/21 10/1/20-6/30/21						
7		Agency Totals		HSA Program		DAS	TOTAL
8	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary
9	Clinical Services Director	\$ 88,000	1.00	5%	0.05	\$4,400	\$4,400
10	Family Consultant 1	\$ 64,000	1.00	4%	0.04	\$2,560	\$2,560
11	Family Consultant 2	\$ 63,000	1.00	51%	0.51	\$31,815	\$31,815
12	Family Consultant 3	\$ 59,000	1.00	4%	0.04	\$2,360	\$2,360
13	Resource Coordinator (Intake)	\$ 48,000	1.00	4%	0.04	\$1,920	\$1,920
14	Education Coord	\$ 44,500	1.00	8%	0.08	\$3,338	\$3,338
15	Database/Fiscal Asst	\$ 44,500	1.00	5%	0.05	\$2,225	\$2,225
16	Act Mgr Acct/Vouchered Svs	\$ 77,000	1.00	3%	0.03	\$1,925	\$1,925
17	Sr Acct /Vouchered Svs	\$ 59,000	1.00	2%	0.02	\$1,180	\$1,180
18	Operations Director	\$ 100,000	1.00	2%	0.02	\$2,000	\$2,000
19	Communications Dir	\$ 96,800	1.00	5%	0.05	\$4,840	\$4,840
21	Community Engagement	\$ 63,000	1.00	20%	0.20	\$12,600	\$12,600
22	Instructional Designer I	\$ 68,250	1.00	10%	0.10	\$6,825	\$6,825
27	Sr Program Mgr (Exec Dir)	\$ 147,000	1.00	1%	0.01	\$1,470	\$1,470
28	Totals			1.23	1.23	\$79,458	\$79,458
29	FRINGE BENEFIT RATE	30%					
30	EMPLOYEE FRINGE BENEFITS					\$23,837	\$23,837
31							
32							
33	TOTAL SALARIES & BENEFITS	\$147,000				\$103,295	\$103,295
34	HSA #2						10/25/2016

	A	B	C	D	E	F	G	
1	Appendix B1, Page 3							
2								
3								
4	Program: Family Caregiver Support Program - Cares Act							
5	(Same as Line 9 on HSA #1)							
6								
7	Operating Expense Detail							
8								
9								
10								
11	TOTAL							
12	<u>Expenditure Category</u>			TERM	<u>10/1/20-6/30/21</u>		<u>10/1/20-6/30/21</u>	
13	Rental of Property				\$13,508	\$	13,508	
14	Telecommunications (phones, T1, website)				\$1,986	\$	1,986	
15	Office Supplies, Postage				\$1,192	\$	1,192	
16	Software Systems License				\$0	\$	-	
17	Printing and Reproduction				\$250	\$	250	
18	Insurance				\$250	\$	250	
19	Staff Training				\$0	\$	-	
20	Staff Travel-(Local Mileage)				\$0	\$	-	
21	Rental of Equipment				\$0	\$	-	
22								
23	CONSULTANTS							
24	Communications Consultant				\$ 2,000	\$	2,000	
25	Audit				\$ 500	\$	500	
26								
27	OTHER							
28	Respite				\$ 41,650	\$	41,650	
29	Legal (Caregiver)				\$ -	\$	-	
30	Caregiver Education Events				\$ 3,000	\$	3,000	
31	Publications & Translations				\$ 10,000	\$	10,000	
32	Computer Eq (each under \$500)				\$ -	\$	-	
33								
34	TOTAL OPERATING EXPENSE				\$ 74,336	\$	74,336	
35								
36	HSA #3						10/25/2016	

	A	B	C	D
1			Appendix B1, Page 4	
2				
3				
4	Program: Family Caregiver Support Program - Cares Act			
5	(Same as Line 9 on HSA #1)			
6	Program Expenditure Detail			
7	SUBCONTRACTORS		10/1/20-6/30/21	10/1/20-6/30/21
8		Community Subcontractor	\$10,000	\$10,000
9			\$0	\$0
10			\$0	\$0
11	TOTAL SUBCONTRACTOR COST		\$10,000	\$10,000
12				
13	EQUIPMENT		10/1/20-6/30/21	10/1/20-6/30/21
	TERM			
14	No.	ITEM/DESCRIPTION		
15				
16				\$0
17				\$0
18	TOTAL EQUIPMENT COST		\$0	\$0
19				
20	R E M O D E L I N G			
21	Description:		10/1/20-6/30/21	10/1/20-6/30/21
22				\$0
23				\$0
24				\$0
25	TOTAL REMODELING COST		\$0	\$0
26				
27	TOTAL CAPITAL/SUBCONTRACTOR EXPENDITURE		\$10,000	\$10,000
28				
29	HSA #4			10/25/2016