

## 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 DS  
EZ

**DATE:** NOVEMBER 4, 2020

**SUBJECT:** **NEW GRANTS:** MULTIPLE GRANTEES (NON-PROFIT) FOR THE  
 PROVISION OF NATURALIZATION SERVICES FOR OLDER ADULTS  
 AND ADULTS WITH DISABILITIES  
 (See table on next page)

**GRANT TERM:** 1/1/2021-6/30/2024

**GRANT AMOUNT:**

<u>New</u>	<u>Contingency</u>	<u>Total</u>
\$2,689,081	\$268,908	\$2,957,989

**ANNUAL AMOUNT:** See table below

**Funding Source**

<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b> \$2,689,081			\$268,908	\$2,957,989
<b>PERCENTAGE:</b> 100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grants with multiple providers to provide Naturalization Services for the period of January 1, 2021 through June 30, 2024, in an amount of \$2,689,081 plus a 10% contingency for a total amount not to exceed \$2,957,989. The purpose of these grants is to provide services for lawful permanent residents (LPRs) to complete the naturalization process to become U.S. citizens.

<b>AGENCY</b>	<b>ANNUAL AMOUNT</b>	<b>1/1/2021-6/30/2024</b>	<b>10% CONTINGENCY</b>	<b>TOTAL NOT TO EXCEED</b>
Asian Pacific Islander (API) Legal Outreach	\$152,102	\$532,357	\$53,236	\$585,593
Centro Latino de San Francisco	\$118,968	\$416,388	\$41,639	\$458,027
Immigration Institute of the Bay Area (IIBA)	\$190,754	\$667,639	\$66,764	\$734,403
Jewish Family and Children's Services (JFCS)	\$83,662	\$292,817	\$29,282	\$322,099
La Raza Centro Legal	\$44,825	\$156,887	\$15,688	\$172,575
Self-Help for the Elderly	\$177,998	\$622,993	\$62,299	\$685,292
<b>Total</b>	<b>\$768,309</b>	<b>\$2,689,081</b>	<b>\$268,908</b>	<b>\$2,957,989</b>

### **Background**

The primary goal of naturalization services is to help lawful permanent residents (LPRs) become naturalized citizens of the United States. In 2016, there were 48,000 estimated individuals in the City and County of San Francisco eligible to become U.S. citizens. Helping vulnerable members of this group successfully navigate the complex naturalization process is important for a number of reasons, including access to certain government/federal benefits, freedom to travel, family reunification through petitions and the ability to vote.

### **Services to be Provided**

Grantees will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee may offer one or more of the following services as described:

1. Citizenship/English as a Second Language (ESL) Classes – Consumers will receive civics (U.S. history & government) and ESL instruction for the purpose of successfully passing the citizenship test and interview administered by the United States Citizenship and Immigration Services (USCIS).
2. One-to-One Assistance – Grantee will provide one-to-one assistance to support consumers throughout the naturalization process. This includes individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Assistance in preparing the N-400, explaining or clarifying the process, checking on the status of pending applications and with applying for language and/or disability waivers (N-648) so older adults or adults with disabilities can be accommodated. One-to-one assistance is distinguished from legal services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – Grantees with a California licensed attorney on staff may deliver legal services which may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

**Selection**

Grantees were selected through Request for Proposals (RFP) #870, which was competitively bid in February 5, 2020.

**Funding**

Funding for these grants is provided through City and County General Funds.

**ATTACHMENTS**

Appendix A – Services to be Provided - Asian Pacific Islander (API) Legal Outreach

Appendix B – Program Budget - Asian Pacific Islander (API) Legal Outreach

Appendix F – Site Chart - Asian Pacific Islander (API) Legal Outreach

Appendix A – Services to be Provided - Centro Latino de San Francisco

Appendix B – Program Budget – Centro Latino de San Francisco

Appendix F – Site Chart – Centro Latino de San Francisco

Appendix A – Services to be Provided - International Institute of the Bay Area (IIBA)

Appendix B – Program Budget – International Institute of the Bay Area (IIBA)

Appendix F – Site Chart – International Institute of the Bay Area (IIBA)

Appendix A – Services to be Provided - Jewish Family and Children’s Services (JFCS)

Appendix B – Program Budget – Jewish Family and Children’s Services (JFCS)

Appendix F – Site Chart – Jewish Family and Children’s Services (JFCS)

Appendix A – Services to be Provided - La Raza Centro Legal

Appendix B – Program Budget – La Raza Centro Legal

Appendix F – Site Chart – La Raza Centro Legal

Appendix A – Services to be Provided - Self Help for the Elderly

Appendix B – Program Budget - Self Help for the Elderly

Appendix F – Site Chart – Self Help for the Elderly

## APPENDIX A – SERVICES TO BE PROVIDED

### Asian Pacific Islander Legal Outreach (dba of Nihonmachi Legal Outreach)

#### NATURALIZATION SERVICES

**Effective January 1, 2021 to June 30, 2024**

#### I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, immigration law, public benefits and bilingual education for citizenship, with the primary goal of helping them become naturalized citizens of the United States.

#### II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Asian Pacific Islander Legal Outreach dba of Nihonmachi Legal Outreach
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes— (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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 consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
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.

N-400		Application for Naturalization. This is the form used to apply for U.S. citizenship. A fee is required for processing.
N-648		Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization		Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM		Office of Contract Management, Human Services Agency
Older Adult		Person who is 60 years or older, used interchangeably with senior.
OCP		Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior		Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS		United States Citizenship and Immigration Services
Unit of Service		Defined as one hour of service
Unduplicated Consumer (UDC)		A unique consumer receiving services in the Grantee's Naturalization program.

### III. Target Population

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

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

#### **IV. Client Eligibility**

To be eligible for naturalization services, individuals must be (1) a lawful permanent resident (LPRs), (2) a resident of San Francisco and (3) a person who is an older adult and/or adult living with a disability.

#### **V. Location and Time of Services**

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

#### **VI. Description of Services**

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – Consumers will receive civics (U.S. history & government) and ESL instruction for the purpose of successfully passing the citizenship test and interview administered by USCIS.
2. One-to-One Assistance – Grantee will provide one-to-one assistance to support consumers throughout the naturalization process. This includes individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Assistance in preparing the N-400, explaining or clarifying the process, checking on the status of pending applications and with applying for language and/or disability waivers (N-648) so older adults or adults with disabilities can be accommodated. One-to-one assistance is distinguished from legal services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – Grantees with a California licensed attorney on staff may deliver legal services which may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Grantee must be experienced and knowledgeable about the naturalization process and is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

The grantee will meet on a quarterly basis, or as needed, with other naturalization service providers and DAS/OCP to help develop and maintain a comprehensive citywide approach to naturalization service issues.

## VII. Service Objectives

On an annual basis:

- Grantee will serve **55** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving one-to-one assistance or legal services.
- Grantee will serve **18** unduplicated consumers who will attend citizenship/ESL classes.
- Grantee will provide **159** units of service of citizenship/ESL class hours. One unit is one class hour.
- Grantee will provide **98** units of service of one-to-one assistance hours. One unit is one hour of assistance provided.
- Grantee will provide **375** units of service of legal services hours. One unit is one hour of legal services provided

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by the grantee and submitted through a link provided by DAS/OCP in the 4th quarter of the fiscal year.

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming citizens) during the contract year.

## VIII. Outcome Objectives

The following outcome objectives will be used to measure the impact of services provided. The grantee shall administer an annual consumer survey to collect the data.

- Consumers feel more prepared for the naturalization test due to their attendance at ESL/Citizenship classes. Target: 75%
- Consumers feel more knowledgeable about the naturalization process due to program participation. Target: 75%
- Consumers received the help they needed navigating the naturalization process. Target: 75%

## IX. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.



- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and Contracts Department staff.
- 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 shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- 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 10th (for July 1-December 31 data) and July 10<sup>th</sup> (for January 1-June 30 data).
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Ofelia Trevino  
Administrative Analyst  
DAS, Office of Community Partnerships  
P.O. Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3571  
[Ofelia.Trevino@sfgov.org](mailto:Ofelia.Trevino@sfgov.org)

Steve Kim  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
(415) 557-5597  
[Steve.Kim@sfgov.org](mailto:Steve.Kim@sfgov.org)

## **X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current

organizational chart, evidence 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 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, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name			Term		
6	Asian Pacific Islander Legal Outreach			1/1/21-6/30/24		
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	<b>Program: Naturalization</b>					
10	Budget Reference Page No.(s)					Total
11	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	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$26,561	\$55,247	\$56,351	\$57,479	\$195,638
14	Operating Expenses	\$16,201	\$29,190	\$28,085	\$26,958	\$100,434
15	<b>Subtotal</b>	<b>\$42,762</b>	<b>\$84,437</b>	<b>\$84,436</b>	<b>\$84,437</b>	<b>\$296,072</b>
16	Indirect Percentage (%)	14%	15%	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$5,789	\$12,666	\$12,665	\$12,666	\$43,785
18	Subcontractor/Capital Expenditures	\$27,500	\$55,000	\$55,000	\$55,000	\$192,500
19	Total Expenditures	\$76,051	\$152,102	\$152,102	\$152,102	\$532,357
20	<b>HSA Revenues</b>					
21	General Fund	\$76,051	\$152,102	\$152,102	\$152,102	\$532,357
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$76,051	\$152,102	\$152,102	\$152,102	\$532,357
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues	\$76,051	\$152,102	\$152,102	\$152,102	\$532,357
37	Full Time Equivalent (FTE)					
39	Prepared by: Dean Ito Taylor / Thac Telephone No.: 415-567-6255					
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>10/20/2020</b>



	A	B	C	D	E	F	G	H	I	J	K	L	M
1													Appendix B, Page 3
2													
3	<b>Asian Pacific Islander Legal Outreach</b>												
4	<b>Program: Naturalization</b>												
5													
6													
7	<b>Operating Expense Detail</b>												
8													
9													
10													
11													TOTAL
12	<u>Expenditure Category</u>			TERM	<u>1/1/21-6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>					<u>1/1/21-6/30/24</u>
13	Rental of Property												
14	Utilities(Elec, Water, Gas, Phone, Garbage)				\$2,569	\$5,138	\$5,138	\$5,138					\$17,983
15	Office Supplies, Postage				\$5,879	\$8,368	\$7,253	\$6,121					\$27,621
16	Building Maintenance Supplies and Repair												
17	Printing and Reproduction												
18	Insurance				\$964	\$1,928	\$1,928	\$1,928					\$6,748
19	Staff Training				\$0	\$108	\$108	\$108					\$324
20	Staff Travel-(Local & Out of Town)				\$0	\$70	\$80	\$85					\$235
21	Rental of Equipment												
22													
23	<b>CONSULTANTS</b>												
24	Audit				\$ 1,400	\$ 2,800	\$ 2,800	\$ 2,800					\$14,000
25													
26													
27	<b>OTHER</b>												
28	Building Cost - Mortgage				\$5,389	\$10,778	\$10,778	\$10,778					\$37,723
29													
30													
31	<b>TOTAL OPERATING EXPENSE</b>				<b>\$ 16,201</b>	<b>\$ 29,190</b>	<b>\$ 28,085</b>	<b>\$ 26,958</b>					<b>\$100,434</b>
32													
33	<b>HSA #3</b>												<b>10/20/2020</b>

	A	B	C	D	E	F	G
1	Appendix B, Page 4						
2							
3	<b>Asian Pacific Islander Legal Outreach</b>						
4	<b>Program: Naturalization</b>						
5							
6							
7							
8	<b>Subcontractor/Capital Expenditures</b>						
9							
10	<b>SUBCONTRACTORS</b>		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
11	Pilipino Senior Resource Center		\$15,000	\$30,000	\$30,000	\$30,000	\$30,000
12	Southeast Asian Development Center		\$12,500	\$25,000	\$25,000	\$25,000	\$25,000
13							
14							
15							
16	<b>TOTAL SUBCONTRACTOR COST</b>		\$27,500	\$55,000	\$55,000	\$55,000	\$192,500
17							
18							
19	<b>EQUIPMENT</b>		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
20	Units	ITEM/DESCRIPTION					
21		Equipment A					
22							
23							
24							
25	<b>TOTAL EQUIPMENT COST</b>		\$0	\$0	\$0	\$0	\$0
26							
27	<b>R E M O D E L I N G</b>		1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
28	Description:						
29	Remodel A						
30							
31							
32	<b>TOTAL REMODELING COST</b>		\$0	\$0	\$0	\$0	\$0
33							
34	<b>TOTAL SUBCONTRACTOR/CAPITAL E</b>		\$27,500	\$55,000	\$55,000	\$55,000	\$192,500
35							
36	<b>HSA #4</b>						10/20/2020

**APPENDIX F - SITE CHART**  
HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Asian Pacific Islander Legal Outreach

FISCAL YEAR: 2021-2024

CONTRACT MAILING ADDRESS: 1121 Mission St. San Francisco, CA 94103

DIRECTOR: Dean Ito Taylor

PHONE NO.: 415-567-6255

<b>SITES:</b> (Naturalization) <b>Name of Site</b>	Main office of Asian Pacific Islander Legal Outreach	Pilipino Senior Resource Center	Southeast Asian Development Center		
Address and Zip Phone Number Fax Number Neighborhood Muni Line #s Person in Charge Site Manager	1121 Mission St. San Francisco, CA 94103 415-567-6255 415-567-6248 SOMA J, KT, L, M, N, 5, 19, 21, 47, 49 Victoria Hartanto Akiko Takeshita	953 Mission St., Suite 111 San Francisco, CA 94103 415-278-0484 N/A SOMA F, 6, 7X, 9, 21, 31 Gabby Moraleda Gabby Moraleda	166 Eddy St. San Francisco, CA 94102 415-771-2600 N/A Tenderloin F, 6, 7X, 9, 21, 31 Judy Young Judy Young		
Programs Offered at Site	Immigration Legal Services	Citizenship Classes	Citizenship Class		
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri ___ Sat Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur ___ Fri ___ Sat Sun	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri ___ Sat Sun	___ Mon ___ Tues ___ Wed ___ Thur ___ Fri ___ Sat Sun	___ Mon ___ Tues ___ Wed ___ Thur ___ Fri ___ Sat Sun
Hours Open	9:00am to 5:30pm	9:30 am to 4:00 pm	10:00 am to 6:00 pm		
Hours of <u>scheduled</u> programming	No scheduled programs, clients by appointment only	Citizenship/ESL classes and one-on-one assistance on Monday through Thursday from 9:30 to 4:00pm	Citizenship/ESL classes and one-on-one assistance on Monday through Friday from 10:00am to 6:00pm		
Hours of meal service	N/A	N/A	N/A		
Annual number of meals at site	N/A	N/A	N/A		
Average number of meals per day	N/A	N/A	N/A		
Days closed	Major U.S. holidays	Major U.S. holidays	Major U.S. holidays		
ADA Accessible	<input checked="" type="checkbox"/> Yes ___ No	<input checked="" type="checkbox"/> Yes ___ No	<input checked="" type="checkbox"/> Yes ___ No	<input type="checkbox"/> Yes ___ No	<input type="checkbox"/> Yes ___ No

## APPENDIX A – SERVICES TO BE PROVIDED

### *Centro Latino de San Francisco*

### NATURALIZATION SERVICES

**Effective January 1, 2021 to June 30, 2024**

#### I. Purpose

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, immigration law, public benefits and bilingual education for citizenship, with the primary goal of helping them become naturalized citizens of the United States.

#### II. Definitions

Adult with a Disability	Person 18-59 years of age living with a disability.
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CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.



Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Centro Latino de San Francisco
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes— (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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 consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
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.

N-400	Application for Naturalization. This is the form used to apply for U.S. citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

### III. Target Population

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

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

#### **IV. Client Eligibility**

To be eligible for naturalization services, individuals must be (1) a lawful permanent resident (LPRs), (2) a resident of San Francisco and (3) a person who is an older adult and/or adult living with a disability.

#### **V. Location and Time of Services**

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

#### **VI. Description of Services**

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – Consumers will receive civics (U.S. history & government) and ESL instruction for the purpose of successfully passing the citizenship test and interview administered by USCIS.
2. One-to-One Assistance – Grantee will provide one-to-one assistance to support consumers throughout the naturalization process. This includes individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Assistance in preparing the N-400, explaining or clarifying the process, checking on the status of pending applications and with applying for language and/or disability waivers (N-648) so older adults or adults with disabilities can be accommodated. One-to-one assistance is distinguished from legal services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – Grantees with a California licensed attorney on staff may deliver legal services which may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Grantee must be experienced and knowledgeable about the naturalization process and is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

The grantee will meet on a quarterly basis, or as needed, with other naturalization service providers and DAS/OCP to help develop and maintain a comprehensive citywide approach to naturalization service issues.

## VII. Service Objectives

On an annual basis:

- Grantee will serve 750 unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving one-to-one assistance or legal services.
- Grantee will serve 145 unduplicated consumers who will attend citizenship/ESL classes.
- Grantee will provide 557 units of service of citizenship/ESL class hours. One unit is one class hour.
- Grantee will provide 722 units of service of one-to-one assistance hours. One unit is one hour of assistance provided.
- Grantee will provide n/a units of service of legal services hours. One unit is one hour of legal services provided

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by the grantee and submitted through a link provided by DAS/OCP in the 4th quarter of the fiscal year.

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming citizens) during the contract year.

## VIII. Outcome Objectives

The following outcome objectives will be used to measure the impact of services provided. The grantee shall administer an annual consumer survey to collect the data.

- Consumers feel more prepared for the naturalization test due to their attendance at ESL/Citizenship classes. Target: 75%
- Consumers feel more knowledgeable about the naturalization process due to program participation. Target: 75%
- Consumers received the help they needed navigating the naturalization process. Target: 75%

## IX. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.

- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and Contracts Department staff.
- 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 shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- 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 10th (for July 1-December 31 data) and July 10<sup>th</sup> (for January 1-June 30 data).
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Paulo Salta  
Program Analyst  
DAS, Office of Community Partnerships  
P.O. Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3551  
[Paulo.Salta@sfgov.org](mailto:Paulo.Salta@sfgov.org)

David Kashani  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3607  
[David.Kashani@sfgov.org](mailto:David.Kashani@sfgov.org)

**X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current

organizational chart, evidence 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 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, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5			Term			
6	<b>Agency Name: Centro Latino de San Francisco</b>		1/1/21-6/30/24			
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	<b>Program: Naturalization</b>					
10	Budget Reference Page No.(s)					Total
11	Program Term	1/1/21-06/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$36,730	\$73,460	\$73,460	\$73,460	\$257,110
14	Operating Expenses	\$5,965	\$16,952	\$16,952	\$16,952	\$56,821
15	<b>Subtotal</b>	<b>\$42,695</b>	<b>\$90,412</b>	<b>\$90,412</b>	<b>\$90,412</b>	<b>\$313,931</b>
16	Indirect Percentage (%)					
17	Indirect Cost (Line 16 X Line 15)					
18	Subcontractor/Capital Expenditures	\$16,789	\$28,556	\$28,556	\$28,556	\$102,457
19	Total Expenditures	\$59,484	\$118,968	\$118,968	\$118,968	\$416,388
20	<b>HSA Revenues</b>					
21	General Fund	\$59,484	\$118,968	\$118,968	\$118,968	\$416,388
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$59,484	\$118,968	\$118,968	\$118,968	\$416,388
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues	\$59,484	\$118,968	\$118,968	\$118,968	\$416,388
37	Full Time Equivalent (FTE)					
39	Prepared by:		Telephone No.: (415) 286-0883			
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>10/12/2020</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3	<b>Agency Name: Centro Latino de San Francisco</b>									
4	<b>Program: Naturalization</b>									
5										
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10	1/1/21-06/30/21 7/1/21-6/30/22 7/1/22-6/30/23 7/1/23-6/30/24 1/1/21-6/30/24									
11		Agency Totals		HSA Program		DAS	DAS	DAS	DAS	TOTAL
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
13	Executive Director	\$79,040	100.00%	6%	0.06	\$2,191	\$4,382	\$4,382	\$4,382	\$15,337
14	ESL Citizenship Instructor	\$72,800	75.00%	40%	0.30	\$10,874	\$21,748	\$21,748	\$21,748	\$76,118
15	Administrator/Instructor	\$49,920	50.00%	79%	0.39	\$9,833	\$19,666	\$19,666	\$19,666	\$68,831
16	Accountant/HR	\$72,800	35.50%	17%	0.06	\$2,229	\$4,458	\$4,458	\$4,458	\$15,603
17	Janitor	\$35,360	50.00%	30%	0.15	\$2,613	\$5,226	\$5,226	\$5,226	\$18,291
18	Social Worker	\$45,760	92.50%	5%	0.05	\$1,069	\$2,138	\$2,138	\$2,138	\$7,483
19	ESL Consumer Service Assist.	\$35,360	37.50%	41%	0.15	\$2,687	\$5,374	\$5,374	\$5,374	\$18,809
20	Controller	\$93,600	12.50%	16%	0.02	\$908	\$1,816	\$1,816	\$1,816	\$6,356
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	<b>TOTALS</b>	<b>\$484,640</b>	<b>4.53</b>	<b>232%</b>	<b>1.18</b>	<b>\$32,404</b>	<b>\$64,808</b>	<b>\$64,808</b>	<b>\$64,808</b>	<b>\$226,828</b>
31										
32	FRINGE BENEFIT RATE	13%								
33	EMPLOYEE FRINGE BENEFITS	\$64,699				\$4,326	\$8,652	\$8,652	\$8,652	\$30,282
34										
35										
36	<b>TOTAL SALARIES &amp; BENEFITS</b>	<b>\$549,339</b>				<b>\$36,730</b>	<b>\$73,460</b>	<b>\$73,460</b>	<b>\$73,460</b>	<b>\$257,110</b>
37	<b>HSA #2</b>									<b>10/12/2020</b>



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	<b>Agency Name: Centro Latino de San Francisco</b>												
4	<b>Program: Naturalization</b>												
5													
6													
7	<b>Operating Expense Detail</b>												
8													
9													
10													
11	TOTAL												
12	<u>Expenditure Category</u>		TERM	<u>1/1/21-06/30/21</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>						<u>1/1/21-6/30/24</u>
13	Rental of Property			\$0	\$0	\$0	\$0						\$ -
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$2,620	\$8,462	\$8,462	\$8,462						\$ 28,006
15	Office Supplies, Postage			\$1,272	\$2,544	\$2,544	\$2,544						\$ 8,904
16	Building Maintenance Supplies and Repair			\$0	\$2,484	\$2,484	\$2,484						\$ 7,452
17	Printing and Reproduction			\$459	\$918	\$918	\$918						\$ 3,213
18	Insurance			\$430	\$860	\$860	\$860						\$ 3,010
19	Staff Training			\$684	\$684	\$684	\$684						\$ 2,736
20	Audit Fees			\$500	\$1,000	\$1,000	\$1,000						\$ 3,500
21	Rental of Equipment			\$0	\$0	\$0	\$0						\$ -
22													
23	<b>CONSULTANTS</b>												
24													
25													
26													
27	<b>OTHER</b>												
28													
29													
30													
31	<b>TOTAL OPERATING EXPENSE</b>			<b><u>\$5,965</u></b>	<b><u>\$16,952</u></b>	<b><u>\$16,952</u></b>	<b><u>\$16,952</u></b>						<b><u>\$56,821</u></b>
32													
33	<b>HSA #3</b>												<b>10/12/2020</b>

	A	B	C	D	E	F	G
1							Appendix B, Page 4
2							
3		Agency Name: Centro Latino de San Francisco					
4		Program: Naturalization					
5							
6							
7							
8		<b>Subcontractor/Capital Expenditures</b>					
9							
10		<b>SUBCONTRACTORS</b>	1/1/21-06/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
11		Mission Neighborhood Center Inc	\$14,273	\$28,556	\$28,556	\$28,556	\$99,941
12							
13							
14							
15							
16		<b>TOTAL SUBCONTRACTOR COST</b>	\$14,273	\$28,556	\$28,556	\$28,556	\$99,941
17							
18							
19		<b>EQUIPMENT</b>	1/1/21-06/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
20	Units	ITEM/DESCRIPTION					
21	3	Office Equipment (laptops) To perform virtual accivities	\$2,516				\$2,516
22							
23							
24							
25		<b>TOTAL EQUIPMENT COST</b>	\$2,516	\$0	\$0	\$0	\$2,516
26							
27		<b>R E M O D E L I N G</b>	1/1/21-06/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/1/21-6/30/24
28		Description:					
29		Remodel A					
30							
31							
32		<b>TOTAL REMODELING COST</b>	\$0	\$0	\$0	\$0	\$0
33							
34		<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	\$16,789	\$28,556	\$28,556	\$28,556	\$102,457
35							
36		<b>HSA #4</b>					10/12/2020

AGENCY: Centro Latino de San Francisco, Inc

FISCAL YEAR: 2021-2024

CONTRACT MAILING ADDRESS: 1656 15<sup>TH</sup> Street San Francisco, Ca 04103

DIRECTOR: Gloria Bonilla

PHONE NO.: 415-286-0883

<u>SITES:</u> (Naturalization)	Centro Latino de San Francisco				
<b>Name of Site</b>	Los Mayores				
Address and Zip Phone Number Fax Number Neighborhood Muni Line #s Person in Charge Site Manager	1656 15 <sup>th</sup> Street SF 94103 415-286-0883 415-861-8782 Mission District 14L, 22, 33, 47, 49 and 71 Gloria Bonilla Maria Eugenia Sarti/ Page Schaefer				
Programs Offered at Site	Congregate, Home Delivered Meals, Community Services and Naturalization				
Days Open	<u>  </u> X Mon <u>  </u> X Tues <u>  </u> X Wed <u>  </u> X Thurs <u>  </u> X Fri <u>  </u> X Sat <u>  </u> Sun				
Hours Open	9:00a.m-4:00p.M-Sat.				
Hours of <u>scheduled</u> programming	9:30a.m-4:00P.M-Sat.				
Hours of meal service	12 noon-1:00p.m.				
Annual number of meals at site	30,096 Los Mayores Site Only				
Average number of meals per day	99				
Total number of service days in FY	304				
Days closed	NewYear, President's Day, Cesar Chavez, Memorial, Independence, Labor, Veteran's, Day After Thanksgiving and Christmas				
ADA Accessible	<u>  </u> X Yes <u>  </u> No				

## APPENDIX A – SERVICES TO BE PROVIDED

### *Immigration Institute of the Bay Area*

#### NATURALIZATION SERVICES

**Effective January 1, 2021 to June 30, 2024**

#### **I. Purpose**

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, immigration law, public benefits and bilingual education for citizenship, with the primary goal of helping them become naturalized citizens of the United States.

#### **II. Definitions**

Adult with a Disability	Person 18-59 years of age living with a disability.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Immigration Institute of the Bay Area
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes— (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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 consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
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.

N-400	Application for Naturalization. This is the form used to apply for U.S. citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

### III. Target Population

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

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

#### **IV. Client Eligibility**

To be eligible for naturalization services, individuals must be (1) a lawful permanent resident (LPRs), (2) a resident of San Francisco and (3) a person who is an older adult and/or adult living with a disability.

#### **V. Location and Time of Services**

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

#### **VI. Description of Services**

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – Consumers will receive civics (U.S. history & government) and ESL instruction for the purpose of successfully passing the citizenship test and interview administered by USCIS.
2. One-to-One Assistance – Grantee will provide one-to-one assistance to support consumers throughout the naturalization process. This includes individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Assistance in preparing the N-400, explaining or clarifying the process, checking on the status of pending applications and with applying for language and/or disability waivers (N-648) so older adults or adults with disabilities can be accommodated. One-to-one assistance is distinguished from legal services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – Grantees with a California licensed attorney on staff may deliver legal services which may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Grantee must be experienced and knowledgeable about the naturalization process and is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

The grantee will meet on a quarterly basis, or as needed, with other naturalization service providers and DAS/OCP to help develop and maintain a comprehensive citywide approach to naturalization service issues.

## VII. Service Objectives

On an annual basis:

- Grantee will serve **280** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving one-to-one assistance or legal services.
- Grantee will serve **80** unduplicated consumers who will attend citizenship/ESL classes.
- Grantee will provide **140** units of service of citizenship/ESL class hours. One unit is one class hour.
- Grantee will provide **450** units of service of one-to-one assistance hours. One unit is one hour of assistance provided.
- Grantee will provide **480** units of service of legal services hours. One unit is one hour of legal services provided

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by the grantee and submitted through a link provided by DAS/OCP in the 4th quarter of the fiscal year.

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming citizens) during the contract year.

## VIII. Outcome Objectives

The following outcome objectives will be used to measure the impact of services provided. The grantee shall administer an annual consumer survey to collect the data.

- Consumers feel more prepared for the naturalization test due to their attendance at ESL/Citizenship classes. Target: 75%
- Consumers feel more knowledgeable about the naturalization process due to program participation. Target: 75%
- Consumers received the help they needed navigating the naturalization process. Target: 75%

## IX. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.



- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and Contracts Department staff.
- 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 shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- 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 10th (for July 1-December 31 data) and July 10<sup>th</sup> (for January 1-June 30 data).
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Paulo Salta  
Program Analyst  
DAS, Office of Community Partnerships  
P.O. Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3551  
[Paulo.Salta@sfgov.org](mailto:Paulo.Salta@sfgov.org)

Tahir Shaikh  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
(415) 557-6085  
[Tahir.Shaikh@sfgov.org](mailto:Tahir.Shaikh@sfgov.org)

**X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current

organizational chart, evidence 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 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, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name		Term			
6	Agency Name: Immigration Institute of the Bay Area		1/1/21-6/30/24			
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	<b>Program: Naturalization</b>					
10	Budget Reference Page No.(s)					Total
11	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	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$53,270	\$106,539	\$106,539	\$106,539	\$372,887
14	Operating Expenses	\$29,666	\$59,334	\$59,334	\$59,334	\$207,668
15	<b>Subtotal</b>	<b>\$82,936</b>	<b>\$165,873</b>	<b>\$165,873</b>	<b>\$165,873</b>	<b>\$580,555</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$12,441	\$24,881	\$24,881	\$24,881	\$87,084
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$95,377	\$190,754	\$190,754	\$190,754	\$667,639
20	<b>HSA Revenues</b>					
21	General Fund	\$95,377	\$190,754	\$190,754	\$190,754	\$667,639
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$95,377	\$190,754	\$190,754	\$190,754	\$667,639
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues	\$95,377	\$190,754	\$190,754	\$190,754	\$667,639
37	Full Time Equivalent (FTE)					
39	Prepared by:		Telephone No.:			
40	HSA-CO Review Signature:		_____			
41	<b>HSA #1</b>					<b>10/19/2020</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3	<b>Agency Name: Immigration Institute of the Bay Area</b>									
4	<b>Program: Naturalization</b>									
5										
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10										
11										
		Agency Totals		HSA Program		DAS	DAS	DAS	DAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE									
13	Immigration Director	\$75,000	1.00	30%	0.30	\$11,250	\$22,500	\$22,500	\$22,500	\$78,750
14	Immigration Attorney	\$62,850	1.00	18%	0.18	\$5,657	\$11,313	\$11,313	\$11,313	\$39,596
15	Immigration Assistant	\$47,000	1.00	18%	0.18	\$4,230	\$8,460	\$8,460	\$8,460	\$29,610
16	ESL/Citizenship Traing	\$62,000	1.00	64%	0.64	\$19,840	\$39,680	\$39,680	\$39,680	\$138,880
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$246,850	4.00	130%	1.30	\$40,977	\$81,953	\$81,953	\$81,953	\$286,836
31										
32	FRINGE BENEFIT RATE	30%								
33	EMPLOYEE FRINGE BEN	\$74,055				\$12,293	\$24,586	\$24,586	\$24,586	\$86,051
34										
35										
36	TOTAL SALARIES & BEN	\$320,905				\$53,270	\$106,539	\$106,539	\$106,539	\$372,887
37	HSA #2									10/19/2020

	A	B	C	D	E	F	G	I	J	K	M
1	Appendix B, Page 3										
2											
3	<b>Agency Name: Immigration Institute of the Bay Area</b>										
4	<b>Program: Naturalization</b>										
5											
6											
7	<b>Operating Expense Detail</b>										
8											
9											
10											
11											
12	<u>Expenditure Category</u>		<u>TERM</u>	<u>1/1/21-6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>				<u>TOTAL</u> <u>1/1/21-6/30/24</u>
13	Rental of Property			\$20,940	\$41,880	\$41,880	\$41,880				\$146,580
14	Utilities(Elec, Water, Gas, Garbage)			\$1,200	\$2,400	\$2,400	\$2,400				\$8,400
15	Office Supplies, Postage			\$1,956	\$3,912	\$3,912	\$3,912				\$13,692
16	Building Maintenance Supplies and Repair			\$1,200	\$2,400	\$2,400	\$2,400				\$8,400
17	Printing and Reproduction										\$0
18	Insurance			\$1,020	\$2,040	\$2,040	\$2,040				\$7,140
19	Staff Training										\$0
20	Telephone			\$2,750	\$5,500	\$5,500	\$5,500				\$19,250
21	Rental of Equipment			\$600	\$1,202	\$1,202	\$1,202				\$4,206
22											
23	<b>CONSULTANTS</b>										
24											
25											
26											
27	<b>OTHER</b>										
28											
29											
30											
31	<b>TOTAL OPERATING EXPENSE</b>			<b>29,666</b>	<b>59,334</b>	<b>59,334</b>	<b>59,334</b>				207,668
32											
33	<b>HSA #3</b>										<b>10/19/2020</b>

**APPENDIX F - SITE CHART**  
HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Immigration Institute of the Bay Area (IIBA)

FISCAL YEAR: 2020-2024

CONTRACT MAILING ADDRESS: 1111 Market Street, 4<sup>th</sup> Floor, San Francisco, CA 94103

DIRECTOR: Ellen Dumesnil

PHONE NO.: 415-538-8110

<b>SITES:</b> (Naturalization) <b>Name of Site</b>	Main office of the International Institute of the Bay Area (IIBA)	201 Turk St Apartments			
Address and Zip Phone Number Fax Number Neighborhood Muni Line #s Person in Charge Site Manager	1111 Market Street, 4 <sup>th</sup> Floor, San Francisco, CA 94103 415-538-8100 415-538-8111 Tenderloin Next to Civic Center BART and Muni station Ellen Dumesnil " "	201 Turk St. Ground Floor, San Francisco, CA 94102  Tenderloin Next to Civic Center BART and Muni station (Contact IIBA)			
Programs Offered at Site	Immigration Legal Services & Citizenship Classes	Citizenship Classes			
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00am to 5:00pm	12:30 pm to 2:00 pm			
Hours of <u>scheduled</u> programming	Citizenship classes on Tuesdays from 4:00 to 5:30pm	12:30 pm to 2:00 pm			
Hours of meal service	N/A	N/A			
Annual number of meals at site	N/A	N/A			
Average number of meals per day	N/A	N/A			
Days closed	Major U.S. holidays	Major U.S. holidays			
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## APPENDIX A – SERVICES TO BE PROVIDED

### *Jewish Family and Children’s Services*

#### NATURALIZATION SERVICES

**Effective January 1, 2021 to June 30, 2024**

#### **I. Purpose**

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, immigration law, public benefits and bilingual education for citizenship, with the primary goal of helping them become naturalized citizens of the United States.

#### **II. Definitions**

Adult with a Disability	Person 18-59 years of age living with a disability.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Jewish Family and Children’s Services
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes– (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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 consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
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.



N-400	Application for Naturalization. This is the form used to apply for U.S. citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

### III. Target Population

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

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

#### **IV. Client Eligibility**

To be eligible for naturalization services, individuals must be (1) a lawful permanent resident (LPRs), (2) a resident of San Francisco and (3) a person who is an older adult and/or adult living with a disability.

#### **V. Location and Time of Services**

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

#### **VI. Description of Services**

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – Consumers will receive civics (U.S. history & government) and ESL instruction for the purpose of successfully passing the citizenship test and interview administered by USCIS.
2. One-to-One Assistance – Grantee will provide one-to-one assistance to support consumers throughout the naturalization process. This includes individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Assistance in preparing the N-400, explaining or clarifying the process, checking on the status of pending applications and with applying for language and/or disability waivers (N-648) so older adults or adults with disabilities can be accommodated. One-to-one assistance is distinguished from legal services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – Grantees with a California licensed attorney on staff may deliver legal services which may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Grantee must be experienced and knowledgeable about the naturalization process and is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

The grantee will meet on a quarterly basis, or as needed, with other naturalization service providers and DAS/OCP to help develop and maintain a comprehensive citywide approach to naturalization service issues.

## VII. Service Objectives

On an annual basis:

- Grantee will serve **54** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving one-to-one assistance or legal services.
- Grantee will serve **8** unduplicated consumers who will attend citizenship/ESL classes.
- Grantee will provide **48** units of service of citizenship/ESL class hours. One unit is one class hour.
- Grantee will provide **n/a** units of service of one-to-one assistance hours. One unit is one hour of assistance provided.
- Grantee will provide **960** units of service of legal services hours. One unit is one hour of legal services provided

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by the grantee and submitted through a link provided by DAS/OCP in the 4th quarter of the fiscal year.

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming citizens) during the contract year.

## VIII. Outcome Objectives

The following outcome objectives will be used to measure the impact of services provided. The grantee shall administer an annual consumer survey to collect the data.

- Consumers feel more prepared for the naturalization test due to their attendance at ESL/Citizenship classes. Target: 75%
- Consumers feel more knowledgeable about the naturalization process due to program participation. Target: 75%
- Consumers received the help they needed navigating the naturalization process. Target: 75%

## IX. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.

- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and Contracts Department staff.
- 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 shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- 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 10th (for July 1-December 31 data) and July 10<sup>th</sup> (for January 1-June 30 data).
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**X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current

organizational chart, evidence 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 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, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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1	Appendix B, Page 1					
2						
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5			Term			
6	<b>Agency Name: Jewish Family &amp; Children's Services</b>		1/1/21-6/30/24			
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	<b>Program: Naturalization</b>					
10	Budget Reference Page No.(s)					Total
11	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	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$34,256	\$70,008	\$70,008	\$70,008	\$244,280
14	Operating Expenses	\$3,392	\$5,288	\$5,288	\$5,288	\$19,256
15	<b>Subtotal</b>	<b>\$37,648</b>	<b>\$75,296</b>	<b>\$75,296</b>	<b>\$75,296</b>	<b>\$263,536</b>
16	Indirect Percentage (%)	11%	11%	11%	11%	11%
17	Indirect Cost (Line 16 X Line 15)	\$4,183	\$8,366	\$8,366	\$8,366	\$29,281
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$41,831	\$83,662	\$83,662	\$83,662	\$292,817
20	<b>HSA Revenues</b>					
21	General Fund	\$41,831	\$83,662	\$83,662	\$83,662	\$292,817
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$41,831	\$83,662	\$83,662	\$83,662	\$292,817
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues	\$41,831	\$83,662	\$83,662	\$83,662	\$292,817
37	Full Time Equivalent (FTE)	0.67	0.67	0.67	0.67	
39	Prepared by: Jean Ijichi		Telephone No.: 415.449.1274			
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b>					<b>10/19/2020</b>

	A	B	C	D	E	F	G	H	I	J
1	Appendix B, Page 2									
2										
3										
4	<b>Program: Naturalization</b>									
5										
6										
7	<b>Salaries &amp; Benefits Detail</b>									
8										
9										
10										
11		Agency Totals		HSA Program		DAS	DAS	DAS	DAS	TOTAL
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary
12	POSITION TITLE									
13	Director of Legal Services	\$89,154	1.00	50%	0.50	\$21,998	\$44,577	\$44,577	\$44,577	\$155,729
14	Accredited Representative	\$49,725	1.00	15%	0.15	\$3,675	\$7,650	\$7,650	\$7,650	\$26,625
15	SAH Director	\$118,482	1.00	1%	0.01	\$911	\$1,623	\$1,623	\$1,623	\$5,780
16										
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										
28										
29										
30	TOTALS	\$257,361	3.00	66%	0.66	\$26,584	\$53,850	\$53,850	\$53,850	\$188,134
31										
32	FRINGE BENEFIT RATE	30%								
33	EMPLOYEE FRINGE BENEF	\$76,806				\$7,672	\$16,158	\$16,158	\$16,158	\$56,146
34										
35										
36	TOTAL SALARIES & BENEF	\$334,167				\$34,256	\$70,008	\$70,008	\$70,008	\$244,280
37	HSA #2									10/19/2020

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	<b>Agency Name: Jewish Family &amp; Children's Services</b>												
4	<b>Program: Naturalization</b>												
5													
6													
7	<b>Operating Expense Detail</b>												
8													
9													
10													
11													
12	<u>Expenditure Category</u>		<u>TERM</u>	<u>1/1/21-6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>						<u>TOTAL</u> <u>1/1/21-6/30/24</u>
13	Rental of Property			\$198	\$346	\$346	\$346						\$1,236
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$477	\$855	\$855	\$855						\$3,042
15	Office Supplies, Postage			\$135	\$271	\$271	\$271						\$948
16	Building Maintenance Supplies and Repair			\$243	\$436	\$436	\$436						\$1,551
17	Printing and Reproduction			\$84	\$142	\$142	\$142						\$510
18	Insurance			\$655	\$1,200	\$1,200	\$1,200						\$4,255
19	Staff Training												\$0
20	Staff Travel-(Local & Out of Town)			\$120	\$240	\$240	\$240						\$840
21	Rental of Equipment			\$77	\$130	\$130	\$130						\$467
22													
23	<b>CONSULTANTS</b>												
24													
25													
26													
27	<b>OTHER</b>												
28	Legal Software Licensing Fees			\$903	\$903	\$903	\$903						\$3,612
29	AILA, CA Bar dues, conference			\$500	\$765	\$765	\$765						\$2,795
30													
31	<b>TOTAL OPERATING EXPENSE</b>			<b>\$ 3,392</b>	<b>\$ 5,288</b>	<b>\$ 5,288</b>	<b>\$ 5,288</b>						\$19,256
32													
33	<b>HSA #3</b>												<b>10/19/2020</b>



**APPENDIX F - SITE CHART**  
HSA / DAS / OFFICE OF COMMUNITY PARTNERSHIPS

AGENCY: Jewish Family and Children's Services (JFCS)

FISCAL YEAR: 2021-2024

CONTRACT MAILING ADDRESS: P.O. Box 159004 San Francisco, CA 94115 (Physical address: 2150 Post St. San Francisco, CA 94115)

DIRECTOR: Anita Friedman

PHONE NO.: 415-449-1200

<u>SITES:</u> (Naturalization)	Main office of Jewish Family and Children's Services (JFCS)				
<b>Name of Site</b>					
Address and Zip	2150 Post St. San Francisco, CA 94115				
Phone Number	415-449-1200 (main line) 415-449-2917 (Legal Services)				
Fax Number	844-589-6699 (fax for Legal Services)				
Neighborhood	Lower Pacific Heights				
Muni Line #s	MUNI lines: 38, 24				
Person in Charge	Traci Dobronravova (supervisor), Brett Snider (service provider)				
Site Manager	Traci Dobronravova				
Programs Offered at Site	Immigration Legal Services				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	6:30 pm to 8:00 pm				
Hours of <u>scheduled</u> programming	Citizenship classes on Mondays from 6:30 to 8:00pm, clients by appointment only				
Hours of meal service	N/A				
Annual number of meals at site	N/A				
Average number of meals per day	N/A				
Days closed	Major U.S. holidays				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## APPENDIX A – SERVICES TO BE PROVIDED

**La Raza Centro Legal, Inc.**

### NATURALIZATION SERVICES

**Effective January 1, 2021 to June 30, 2024**

#### **I. Purpose**

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, immigration law, public benefits and bilingual education for citizenship, with the primary goal of helping them become naturalized citizens of the United States.

#### **II. Definitions**

Adult with a Disability	Person 18-59 years of age living with a disability.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	La Raza Centro Legal, Inc.
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes— (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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 consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
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.

N-400	Application for Naturalization. This is the form used to apply for U.S. citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

### III. Target Population

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

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

#### **IV. Client Eligibility**

To be eligible for naturalization services, individuals must be (1) a lawful permanent resident (LPRs), (2) a resident of San Francisco and (3) a person who is an older adult and/or adult living with a disability.

#### **V. Location and Time of Services**

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

#### **VI. Description of Services**

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – Consumers will receive civics (U.S. history & government) and ESL instruction for the purpose of successfully passing the citizenship test and interview administered by USCIS.
2. One-to-One Assistance – Grantee will provide one-to-one assistance to support consumers throughout the naturalization process. This includes individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Assistance in preparing the N-400, explaining or clarifying the process, checking on the status of pending applications and with applying for language and/or disability waivers (N-648) so older adults or adults with disabilities can be accommodated. One-to-one assistance is distinguished from legal services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – Grantees with a California licensed attorney on staff may deliver legal services which may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Grantee must be experienced and knowledgeable about the naturalization process and is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

The grantee will meet on a quarterly basis, or as needed, with other naturalization service providers and DAS/OCP to help develop and maintain a comprehensive citywide approach to naturalization service issues.

## VII. Service Objectives

On an annual basis:

- Grantee will serve **19** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving one-to-one assistance or legal services.
- Grantee will serve **N/A** unduplicated consumers who will attend citizenship/ESL classes.
- Grantee will provide **N/A** units of service of citizenship/ESL class hours. One unit is one class hour.
- Grantee will provide **N/A** units of service of one-to-one assistance hours. One unit is one hour of assistance provided.
- Grantee will provide **480** units of service of legal services hours. One unit is one hour of legal services provided

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by the grantee and submitted through a link provided by DAS/OCP in the 4th quarter of the fiscal year.

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming citizens) during the contract year.

## VIII. Outcome Objectives

The following outcome objectives will be used to measure the impact of services provided. The grantee shall administer an annual consumer survey to collect the data.

- Consumers feel more prepared for the naturalization test due to their attendance at ESL/Citizenship classes. Target: 75%
- Consumers feel more knowledgeable about the naturalization process due to program participation. Target: 75%
- Consumers received the help they needed navigating the naturalization process. Target: 75%

## IX. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.

- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and Contracts Department staff.
- 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 shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- 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 10th (for July 1-December 31 data) and July 10<sup>th</sup> (for January 1-June 30 data).
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

Ofelia Trevino  
Administrative Analyst  
DAS, Office of Community Partnerships  
P.O. Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3571  
[Ofelia.Trevino@sfgov.org](mailto:Ofelia.Trevino@sfgov.org)

Tahir Shaikh  
Contract Manager  
Human Services Agency  
PO Box 7988  
San Francisco, CA 94120-7988  
(415) 557-6085  
[Tahir.Shaikh@sfgov.org](mailto:Tahir.Shaikh@sfgov.org)

**X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current

organizational chart, evidence 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 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, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.



	A	B	C	D	E	F
1	Appendix B, Page 1					
2						
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name		Term			
6	Agency Name: La Raza Centro Legal		1/1/21-6/30/24			
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	<b>Program: Naturalization</b>					
10	Budget Reference Page No.(s)					Total
11	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	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$16,697	\$33,394	\$33,394	\$33,394	\$116,879
14	Operating Expenses	\$3,137	\$6,275	\$6,275	\$6,275	\$21,962
15	<b>Subtotal</b>	<b>\$19,834</b>	<b>\$39,669</b>	<b>\$39,669</b>	<b>\$39,669</b>	<b>\$138,841</b>
16	Indirect Percentage (%)	13%	13%	13%	13%	13%
17	Indirect Cost (Line 16 X Line 15)	\$2,578	\$5,156	\$5,156	\$5,156	\$18,046
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$22,412	\$44,825	\$44,825	\$44,825	\$156,887
20	<b>HSA Revenues</b>					
21	General Fund	\$22,412	\$44,825	\$44,825	\$44,825	\$156,887
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$22,412	\$44,825	\$44,825	\$44,825	\$156,887
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues	\$22,412	\$44,825	\$44,825	\$44,825	\$156,887
37	Full Time Equivalent (FTE)					
39	Prepared by:		Telephone No.:			
40	HSA-CO Review Signature: _____					
41	<b>HSA #1</b> <span style="float: right;"><b>6/20/2018</b></span>					



	A	B	C	D	E	G	H	I	J	M
1	Appendix B, Page 3									
2										
3	<b>Agency Name: La Raza Centro Legal</b>									
4	<b>Program: Naturalization</b>									
5										
6										
7	<b>Operating Expense Detail</b>									
8										
9										
10										
11	TOTAL									
12	<u>Expenditure Category</u>	TERM	<u>1/1/21-6/30/21</u>	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>	<u>1/1/21-6/30/24</u>			
13	Rental of Property		\$800	\$1,600	\$1,600	\$1,600	\$5,600			
14	Telecommunications Office Supplies, Postage, Printing &		\$299	\$597	\$597	\$597	\$2,090			
15	Building Maintenance and Repair		\$192	\$384	\$384	\$384	\$1,344			
16	Insurance		\$80	\$160	\$160	\$160	\$560			
17	Travel & Meals		\$356	\$713	\$713	\$713	\$2,495			
18	Furniture & Equipment		\$60	\$119	\$119	\$119	\$417			
19			\$133	\$267	\$267	\$267	\$934			
20										
21	<b>CONSULTANTS</b>									
22	Accounting		\$800	\$1,600	\$1,600	\$1,600	\$5,600			
23	Janitorial		\$230	\$461	\$461	\$461	\$1,613			
24	IT Consultants		\$67	\$134	\$134	\$134	\$469			
25										
26	<b>OTHER</b>									
27	Computer Hardware		\$64	\$128	\$128	\$128	\$448			
28	Dues, Memberships, & Subscriptions		\$56	\$112	\$112	\$112	\$392			
29										
30	<b>TOTAL OPERATING EXPENSE</b>		<b><u>3,137</u></b>	<b><u>6,275</u></b>	<b><u>6,275</u></b>	<b><u>6,275</u></b>	<b><u>\$21,962</u></b>			
31										
32	<b>HSA #3</b>									<b>6/20/2018</b>

APPENDIX F - SITE CHART

HSA / DAS

AGENCY: La Raza Centro Legal  
 FISCAL YEAR: 21-24

CONTRACT

DIRECTOR: Amanda Alvarado-Ford

CA PHONE NO.: 415-553-3410

<b>SITES:</b>					
<b>Name of Site:</b>	<b>La Raza Centro Legal</b>				
Address and Zip:	474 Valencia St. Ste. 295, San Francisco, CA 94103				
Phone Number:	415-553-3410				
Fax Number:					
Neighborhood:	Mission District				
Muni Line #s:	49,14, 22, T, K,				
Person in Charge	Amanda Alvarado Ford				
Site Manager: Amanda Alvarado Ford	Amanda Alvarado Ford				
Programs Offered at Site	Senior /Disability Law Program, Worker's Rights Program, Immigration Program.				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	7 hours a day (9AM-12 PM / 1 PM-5 PM)				
Hours of <u>scheduled</u> programming					
Hours of meal service	0				
Annual number of meals at site	0				
Average number of meals per day	0				
Total number of service days in FY	246				
Days closed	119				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No



## APPENDIX A – SERVICES TO BE PROVIDED

### *Self Help for the Elderly*

#### NATURALIZATION SERVICES

**Effective January 1, 2021 to June 30, 2024**

#### **I. Purpose**

The purpose of this grant is to provide services for lawful permanent residents (LPRs) regarding naturalization, immigration law, public benefits and bilingual education for citizenship, with the primary goal of helping them become naturalized citizens of the United States.

#### **II. Definitions**

Adult with a Disability	Person 18-59 years of age living with a disability.
CA GetCare	A web-based application that provides specific functionalities for contracted agencies to use to perform consumer intake/assessment/enrollment, record service units, run reports, etc.
CARBON	Contracts Administration, Reporting, and Billing On Line System.
City	City and County of San Francisco, a municipal corporation.
Controller	Controller of the City and County of San Francisco or designated agent.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment
ESL	English-as-a-Second Language; applicable to the naturalization services funded through this RFP.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Self Help for the Elderly
HSA	Human Services Agency of the City and County of San Francisco
Legal Services	Legal advice and representation provided by an attorney to older adults and/or adult with disabilities with economic or social needs; and includes— (i) to the extent feasible, counseling or other appropriate assistance by a paralegal or law student under the direct supervision of an attorney; and (ii) counseling or representation by a non-lawyer where permitted by law. Direct legal assistance may be provided face-to-face, by telephone, or by electronic communication and includes, but is not limited to, advice and consultation, litigation, administrative representation, brief services, preparing legal documents and pro per assistance.
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 consumers to self-identify their income status, not to be used as a means test to qualify for the program.
LPR	Lawful Permanent Resident
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.

N-400	Application for Naturalization. This is the form used to apply for U.S. citizenship. A fee is required for processing.
N-648	Medical Certification and Naturalization Guidance Form an LPR can file to request an exception to the English and civics testing requirements for naturalization because of physical or developmental disability or mental impairment.
Naturalization	Process by which a lawful permanent (U.S.) resident applies for citizenship and completes the required process to become a U.S. citizen.
OCM	Office of Contract Management, Human Services Agency
Older Adult	Person who is 60 years or older, used interchangeably with senior.
OCP	Office of Community Partnerships (formerly known as Office on the Aging / OOA).
Senior	Person who is 60 years or older, used interchangeably with older adult.
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).
USCIS	United States Citizenship and Immigration Services
Unit of Service	Defined as one hour of service
Unduplicated Consumer (UDC)	A unique consumer receiving services in the Grantee's Naturalization program.

### III. Target Population

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

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



#### **IV. Client Eligibility**

To be eligible for naturalization services, individuals must be (1) a lawful permanent resident (LPRs), (2) a resident of San Francisco and (3) a person who is an older adult and/or adult living with a disability.

#### **V. Location and Time of Services**

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

#### **VI. Description of Services**

Grantee will provide services that will aid older adults and adults with disabilities in obtaining citizenship. Grantee will offer one or more of the following services:

1. Citizenship/English as a Second Language (ESL) Classes – Consumers will receive civics (U.S. history & government) and ESL instruction for the purpose of successfully passing the citizenship test and interview administered by USCIS.
2. One-to-One Assistance – Grantee will provide one-to-one assistance to support consumers throughout the naturalization process. This includes individual counseling, guidance and support provided to individuals about to apply for citizenship or who have an application pending. Assistance in preparing the N-400, explaining or clarifying the process, checking on the status of pending applications and with applying for language and/or disability waivers (N-648) so older adults or adults with disabilities can be accommodated. One-to-one assistance is distinguished from legal services as they are not provided by or under the supervision of a California licensed attorney.
3. Legal Services – Grantees with a California licensed attorney on staff may deliver legal services which may include providing legal information, advice, counseling, administrative representation, and judicial representation to an LPR by a member of the California State Bar or by a non-attorney under the supervision and control of a member of the California State Bar as it relates to citizenship/naturalization issues.

Grantee must be experienced and knowledgeable about the naturalization process and is expected to keep up with changes in legislation and policies affecting immigration issues. Grantee should be as culturally and linguistically competent as possible to serve the diverse San Francisco community.

The grantee will meet on a quarterly basis, or as needed, with other naturalization service providers and DAS/OCP to help develop and maintain a comprehensive citywide approach to naturalization service issues.

## VII. Service Objectives

On an annual basis:

- Grantee will serve **800** unduplicated consumers, older adults and adults with disabilities. This count will include consumers/students attending the citizenship/ESL classes and/or receiving one-to-one assistance or legal services.
- Grantee will serve **580** unduplicated consumers who will attend citizenship/ESL classes.
- Grantee will provide **2,000** units of service of citizenship/ESL class hours. One unit is one class hour.
- Grantee will provide **1,800** units of service of one-to-one assistance hours. One unit is one hour of assistance provided.
- Grantee will provide **n/a** units of service of legal services hours. One unit is one hour of legal services provided

The following measurements will help track program performance and impact, and may be used to develop benchmarks in future years. They shall be collected by the grantee and submitted through a link provided by DAS/OCP in the 4th quarter of the fiscal year.

- Number of N-400s submitted in the contract year on behalf of clients.
- Number of N-648s filed in the contract year on behalf of clients.
- Quantity of language waivers filed in the contract year on behalf of clients.
- Quantity of clients completing the naturalization process (becoming citizens) during the contract year.

## VIII. Outcome Objectives

The following outcome objectives will be used to measure the impact of services provided. The grantee shall administer an annual consumer survey to collect the data.

- Consumers feel more prepared for the naturalization test due to their attendance at ESL/Citizenship classes. Target: 75%
- Consumers feel more knowledgeable about the naturalization process due to program participation. Target: 75%
- Consumers received the help they needed navigating the naturalization process. Target: 75%

## IX. Reporting and Other Requirements

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

- A. The grantee will enter into the CA GetCare Service Unit section all the units of service by the 5th working day of the month for the preceding month.

- B. Monthly, quarterly, and annual reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system as required by DAS/OCP and Contracts Department staff.
- 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 shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- 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 10th (for July 1-December 31 data) and July 10<sup>th</sup> (for January 1-June 30 data).
- F. Grantee shall develop and deliver ad hoc reports as requested by HSA/DAS/OCP.
- G. Grantee will develop and maintain with OCP's approval, an updated Site Chart (using OCP's format) with details about the program.
- H. For assistance with reporting requirements or submission of reports, please contact:

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Program Analyst  
DAS, Office of Community Partnerships  
P.O. Box 7988  
San Francisco, CA 94120-7988  
(415) 355-3551  
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PO Box 7988  
San Francisco, CA 94120-7988  
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## **X. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on CA Getcare, maintenance of service unit logs; agency and organization standards, which include current

organizational chart, evidence 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 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, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

	A	B	C	D	E	F
1	Appendix B, Page 1					
2	10/1/2020					
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>					
4	<b>BY PROGRAM</b>					
5	Name		Term			
6	<b>SELF-HELP FOR THE ELDERLY</b>		1/1/21-6/30/24			
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	<b>Program: NATURALIZATION</b>					
10	Budget Reference Page No.(s)					Total
11	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	1/1/21-6/30/24
12	<b>Expenditures</b>					
13	Salaries & Benefits	\$67,064	\$134,123	\$134,123	\$134,123	\$469,433
14	Operating Expenses	\$10,327	\$20,658	\$20,658	\$20,658	\$72,301
15	<b>Subtotal</b>	<b>\$77,391</b>	<b>\$154,781</b>	<b>\$154,781</b>	<b>\$154,781</b>	<b>\$541,734</b>
16	Indirect Percentage (%)	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$11,608	\$23,217	\$23,217	\$23,217	\$81,259
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0	\$0
19	Total Expenditures	\$88,999	\$177,998	\$177,998	\$177,998	\$622,993
20	<b>HSA Revenues</b>					
21	General Fund	\$88,999	\$177,998	\$177,998	\$177,998	\$622,993
22						
23						
24						
25						
26						
27						
28						
29	TOTAL HSA REVENUES	\$88,999	\$177,998	\$177,998	\$177,998	\$622,993
30	<b>Other Revenues</b>					
31						
32						
33						
34						
35						
36	Total Revenues	\$88,999	\$177,998	\$177,998	\$177,998	\$622,993
37	Full Time Equivalent (FTE)					
39	Prepared by:    Leny Nair                      Telephone No.415-677-7682					
40	HSA-CO Review Signature:                      _____					
41	<b>HSA #1</b> <span style="float: right;"><b>2/25/2020</b></span>					



	A	B	C	D	E	G	I	K	N
1	Appendix B, Page 3								
2	10/1/2020								
3	<b>SELF-HELP FOR THE ELDERLY</b>								
4	<b>Program: NATURALIZATION</b>								
5									
6									
7	<b>Operating Expense Detail</b>								
8									
9									
10									
11	TOTAL								
12	<u>Expenditure Category</u>		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	1/1/21-6/30/24	
13	Rental of Property			\$4,675	\$9,350	\$9,350	\$9,350	\$32,725	
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$1,681	\$3,358	\$3,358	\$3,358	\$11,755	
15	Office Supplies, Postage			\$296	\$600	\$600	\$600	\$2,096	
16	Building Maintenance Supplies and Repair			\$2,750	\$5,500	\$5,500	\$5,500	\$19,250	
17	Printing and Reproduction			\$0	\$0	\$0	\$0	\$0	
18	Insurance			\$400	\$800	\$800	\$800	\$2,800	
19	Staff Training			\$50	\$100	\$100	\$100	\$350	
20	Staff Travel-(Local & Out of Town)			\$400	\$800	\$800	\$800	\$2,800	
21	Rental of Equipment								
22									
23	<b>CONSULTANTS</b>								
24									
25									
26									
27	<b>OTHER</b>								
28	Recruitment			\$75	\$150	\$150	\$150	\$525	
29									
30									
31	<b>TOTAL OPERATING EXPENSE</b>			<b>\$ 10,327</b>	<b>\$ 20,658</b>	<b>\$ 20,658</b>	<b>\$ 20,658</b>	<b>\$72,301</b>	
32									
33	<b>HSA #3</b>								
	2/25/2020								





