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

то:	AGING & AD	ULT SERV	VICES COMM	SSION	
THROUGH:	SHIREEN McS	SPADDEN,	EXECUTIVE	DIRECTOR	
FROM:	CINDY KAUF ESPERANZA	FMAN, DE ZAPIEN, A	PUTY DIREC	CTOR OF CON	tracts E.2.
DATE:	DECEMBER 2	, 2020			
SUBJECT:	NEW GRANT PROVISION (S: MULTI DF LEGAL	PLE GRANTI SERVICES FO	EES (NON-PRO DR OLDER AD	DFIT) FOR THE ULTS
	(see table on th	e next page)		
GRANT TERMS:	<u>1/1/21-6/30/24</u>				
GRANT AMOUNTS:	\$5,272,838		<u>ngency</u> 7,283	<u>Total</u> \$5,800,121	
FUNDING SOURCE	<u>County</u>	<u>State</u>	Federal	<u>Contingency</u>	Total
ANNUAL AMOUNT	\$3,585,530		\$1,687,308	\$527,283	\$5,800,121
PERCENTAGE	68%		32%		100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with multiple providers for the provision of legal services for older adults during the period of January 1, 2021 through June 30, 2024, in the combined amount of \$5,272,838 plus a 10% contingency for a total not to exceed amount of \$5,800,121. The specific breakdown of funding per grantee is summarized in the following table.

Grantee	1/1/21- 6/30/21	Annual	Annual X3	Total	10% Contingency	Total Not to Exceed
Asian Americans Advancing Justice – Asian Law Caucus	\$106,607	\$213,214	\$639,642	\$746,249	\$74,625	\$820,874
Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach)	\$90,979	\$181,958	\$545,874	\$636,853	\$63,685	\$700,538
La Raza Centro Legal	\$67,500	\$135,000	\$405,000	\$472,500	\$47,250	\$519,750
Legal Assistance to the Elderly	\$341,187	\$682,373	\$2,047,119	\$2,388,306	\$238,831	\$2,627,136
Open Door Legal	\$69,848	\$139,696	\$419,088	\$488,936	\$48,894	\$537,830
UC Hastings College of the Law – Medical Legal Partnership for Seniors	\$77,142	\$154,284	\$462,852	\$539,994	\$53,999	\$593,993
Total	\$753,263	\$1,506,525	\$4,519,575	\$5,272,838	\$527,283	\$5,800,121

Background

Legal services can be critical to maintaining or securing a better quality of life for older adults. DAS' legal services providers work to provide their clients with information and advice designed to allow them to make informed decisions and assert their rights on a variety of issues. Legal services program providers help eligible clients with a variety of legal issues, which may include public benefit eligibility determinations and appeals, housing rights and eviction prevention, consumer fraud, and debt collection issues, elder abuse prevention, simple will preparation, disability planning and advance directives, and immigration matters.

Services to be Provided

Grantees will operate a legal services program offering legal information and representation for older adults in need of assistance. Grantees have and will continue to develop legal expertise in areas most impacting older adults; Grantees are also expected to be informed about changes in the law that might affect the provision of services. Grantees should be as culturally and linguistically competent as possible to serve a diverse San Francisco population while also being experienced and knowledgeable about working with an older adult population.

Grantees will each offer an initial intake process for clients in need of legal services. Upon completion of screening, further services will fall into one of the following modules of service:

1. <u>Information and Referral</u> – the client concern is more appropriately referred to another service for assistance.

- 2. <u>Advise and Close</u> the client issue is very easily addressed, advice is provided and the case is closed.
- 3. <u>Brief Services</u> the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4. <u>Case Acceptance</u> the client issue warrants more extensive legal representation and a case file is opened, e.g. elder abuse, consumer fraud, reasonable accommodation for housing, etc.

Outcomes for legal services assistance can include stabilizing or improving a housing situation, increasing or maintaining an income source, securing protective court orders against someone harming a vulnerable client, or deterring predatory collection and illegal business practices targeting an older adult.

Coronavirus Pandemic and Impact on Services

At the implementation of the City's shelter-in-place order in March 2020, DAS legal services providers halted all in-office operations, shifting services to phone and virtual options. This remains the preferred and primary mode of service delivery among DAS funded legal providers. With the development of public health guidance on safe operations for staff and clients, legal service providers now offer limited instances of in-office services when alternatives are not available. These in-office operations utilize office technology to connect clients virtually to staff (located elsewhere in the office or off-site) or use of physical barriers and restricted staffing on site for socially distanced transactions. While client utilization of services dropped off initially with the switch in service access, it has steadily grown through the remainder of 2020. Looking forward, DAS legal services are expected to be near or at pre-COVID service levels in terms of clients served and legal service hours provided.

Grantee Selections

Grantees were selected through Request for Proposals (RFP) 864, Legal Services for Older Adults, which was competitively bid in January 2020.

Funding

Funding will be provided through a Federal (32%) and County General Funds (68%).

ATTACHMENTS

Asian Americans Advancing Justice – Asian Law Caucus Appendix A- Services to be Provided Appendix B- Program Budget

Asian Pacific Islander Legal Outreach (DBA of Nihonmachi Legal Outreach) Appendix A- Services to be Provided Appendix B- Program Budget

La Raza Centro Legal Appendix A- Services to be Provided Appendix B- Program Budget

Legal Assistance to the Elderly

Appendix A- Services to be Provided Appendix B- Program Budget

Open Door Legal

Appendix A- Services to be Provided Appendix B- Program Budget

UC Hastings College of the Law – Medical Legal Partnership for Seniors Appendix A- Services to be Provided Appendix B- Program Budget

APPENDIX A

ADVANCING JUSTICE – ASIAN LAW CAUCUS

LEGAL SERVICES FOR OLDER ADULTS

January 1, 2021 – June 30, 2024

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

II. Definitions

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
CARBON	Contracts Administration, Reporting, and Billing Online System
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self- care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self- direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Advancing Justice – Asian Law Caucus
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance cing Justice – Asian Law Cau	Legal advice and representation provided by an attorney to older individuals 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 nonlawyer 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 se 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 100% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior
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).

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III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

Advancing Justice – Asian Law Caucus' offices are located at 55 Columbus Avenue. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) <u>Information and Referral</u> the concern is more appropriately referred to another service for assistance
- 2) <u>Advise and Close</u> the legal issue is very easily addressed, advice is provided and the case is closed
- 3) <u>Brief Services</u> the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- <u>Case Acceptance</u> the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) <u>Income/Nutrition</u>: Supplemental Security Income ("SSI"), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) <u>Long-term Care</u>: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) <u>Healthcare</u>: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) <u>Protective Services/Elder Abuse/Defense against Conservatorship</u>: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) <u>Civil Rights</u>: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will serve as the lead agency among other DAS funded legal services providers in the production of a quarterly legal newsletter. This will include being responsible for the planning, development, and distribution of the newsletter, as well as collaborating with the other legal services providers to publish the newsletter content. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

For the period 1/1/21 - 6/30/21:

- Grantee will serve <u>65</u> unduplicated clients.
- Grantee will provide <u>972</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.
- Grantee will provide <u>100</u> units of service of staffing hours to support the publication of a legal services newsletter as an outreach and educational tool. Staffing hours will include: attending planning meetings, researching, writing, editing, and sending copy to be published, and distribution.

On an annual basis, starting July 1, 2021:

- Grantee will serve **<u>130</u>** unduplicated clients.
- Grantee will provide <u>1,945</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.
- Grantee will provide <u>200</u> units of service of staffing hours to support the publication of a legal services newsletter as an outreach and educational tool. Staffing hours will include: attending planning meetings, researching, writing, editing, and sending copy to be published, and distribution.

VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information

- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via on online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25th each year
- 2nd Quarter (covering October, November, December) due January 25th each year
- 3rd Quarter (covering January, February, March) due April 25th each year
- 4th Quarter (covering April, May, June) due July 25th each year

IX. Additional Reporting 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 Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- 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 shall be submitted via the CARBON system.
- D. 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 10th (for January 1-June 30 data
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.

- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Reanna Albert Program Analyst, Office of Community Partnerships DAS P.O. Box 7988 San Francisco, CA 94120-7988 reanna.albert@sfgov.org and

Elizabeth Leone Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 (415) 355-3607 elizabeth.leone@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 of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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2						
3	HUMAN SERVICES AGE	NCY BUDGET SU	JMMARY			
4						
5	Name	· · · · · · · · · · · · · · · · · · ·			Term	
					1/1/2021 to 6	3/30/2024
	Asian Americans Advancing Justice / A					
	(Check One) New 🗹 Renewal					
8	If modification, Effective Date of Mod.	No. of Mod.	ι			
a	Program: Legal Services for Older Adul	ts FY21-24				
Ť		1/1/2021-	7/1/2021-	7/1/2022-	7/1/2023-	TOTAL
10	Budget Reference	6/30/2021	6/30/2022	6/30/2023	6/30/2024	TOTAL
	Dragrom Torm					
11 12	Program Term Expenditures	<u> </u>				di lastrono di distance
	Salaries & Benefits	\$95,992	\$191,750	\$191,750	\$191,750	\$671,242
	Operating Expense	\$10,616	\$21,231	\$21,231	\$21,231	\$74,309
15	Subtotal	\$106,607	\$212,981	\$212,981	\$212,981	\$745,550
16	Indirect Percentage (%)		1%	1%	1%	
17	Indirect Cost (Line 16 X Line 15)		\$233	\$233	\$233	\$699
18	Pass-through to Providers					A740.040
	Total Expenditures	\$106,607	\$213,214	\$213,214	\$213,214	\$746,249
20	HSA Revenues					A740 040
21	General Fund	\$106,607	\$213,214	\$213,214	\$213,214	\$746,249
	Federal Funds CFDA #93.044					······
23		,				
24		·				······
25 26	······································					
27						
28	······································					
	TOTAL HSA REVENUES	\$106,607	\$213,214	\$213,214	\$213,214	\$746,249
30	Other Revenues					
31				· · · · · · · · · · · · · · · · · · ·		
32						
33	· · · · · · · · · · · · · · · · · · ·					
34 35				· · · · · · · · · · · · · · · · · · ·		
<u> </u>						
36	Total Revenues				4 70	1.57
37	Full Time Equivalent (FTE)	0.94	1.78	1.78	1.78	1.57
39	Prepared by:		Telephone No.:			
-	HSA-CO Review Signature:					
		-				
41	HSA #1				,	

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1 2 3 4 Program Name: Legal Services to Older Adults FY21-24 5 (Same as Line 9 on HSA #1)			·						ŝ.
0 λ 0		Salarie	Salaries & Benefits Detail	ts Detail					
<u>10</u>	Arency Totals	otals	HSA Program		1/1/21-6/30/21	7/1/21-6/30/22	7/1/21-6/30/22 7/1/22-6/30/23 7/1/23-6/30/24	1/23-6/30/24	TOTAL
	Annual Full TimeSalary for FTE	Total	% FTE funded by HSA (Max 100%)	sted E					
I olita E Housing Prode	\$114,000	1.00	29%	0.29	9,132	\$41,519	\$41,519	41,519	133,690
	\$96.000	1.00	24%	0.24	22,637	\$22,637	\$22,637	22,637	90,547
	\$63,287	1.00	%8	0.08	5,379	\$5,379	\$5,379	5,379	21,517
	\$67,812	1.00	22%	0.22	9,741	\$16,241	\$16,241	16,241	58,463
17 Sallie I Housing Communicty Advocate	\$67,850	1.00	26%	0.26	17,396	\$17,396	\$17,396	17,396	69,584
	\$75,086	1.00	14%	0.14	2,316	\$12,953	\$12,953	12,953	41,175
10 I i W Denuty Director/Exec Director	\$134,000	1.00	6%	0.06	3,007	\$9,380	\$9.380	9,380	31,148
20 Ebilin V Intake Coordinator	\$70,046	1.00	15%	0.15	2,780	\$13,334	\$13,334	13,334	42,782
21 Winifred K Worker's Rights Attomev and Litigation Director	\$130,354	1.00	3%	0.03	2,124	\$5,214	\$5,214	5,214	17,766
22 Khoua T. Legal Coordinator	\$71,904	1.00	11%	0.11	2,281	\$9,347	\$9,347	9,347	30,321
23				,		-			
24				1					
25)					
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29				:			· ·		
0 TOTALS		10,00	157%	1.57	\$76,793	\$153,400	\$153,400	\$153,400	\$536,993
31 FRINGE BENEFIT RATE 25 33 EMPLOYEE FRINGE BENEFITS	25% 25.00%				19,198	38,350	38,350	38,350	134,248
36 TOTAL SALARIES & BENEFITS	\$0				\$95,992	\$191,750	\$191,750	\$191,750	\$671,242
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Program Name: Legal Services to Older Adults FY21-24 (Same as Line 9 on HSA #1)					
	Operating	Operating Expense Detail			
TERM	TERM 1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	TOTAL
Expenditure Category					
Rental of Property					
Utilities(Elec, Water, Gas, Phone, Garbage)					
Postage (Senior Newsletters)	\$2,287	\$6,861	\$6,861	\$6,861	\$22,870
Building Maintenance Supplies and Repair					
Printing and Reproduction (Senior Letters)	\$4,233	\$12,699	\$12,699	\$12,699	\$42,330
Staff Training					
Staff Travel-(Local & Out of Town)					
Rental of Equipment					
CONSULTANTS					
design & translation fees (Senior newsletters)	\$480	\$1,671	\$1,671	\$1,671	\$5,493
Contractual services: tralation, coulsultation	\$3,616				\$3,616
OTHER Lears and other dues					
Libraary/Legal/Research					
	¢10 616	£01 031	£21-224	\$21.231	\$74.309
Library/Legal/Research	010010		4		

APPENDIX A API LEGAL OUTREACH LEGAL SERVICES FOR OLDER ADULTS January 1, 2021 – June 30, 2024

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

II. Definitions

	California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
	CARBON	Contracts Administration, Reporting, and Billing Online System
	DAS	Department of Disability and Aging Services
	Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self- care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self- direction; c) Cognitive functioning, and emotional adjustment
	Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
	Grantee	API Legal Outreach
	HSA	Human Services Agency of City and County of San Francisco
Le	Legal Assistance	Legal advice and representation provided by an attorney to older individuals 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 nonlawyer 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 1
1 \$	Services for Older Adults	

API Legal Outreach Legal Services for Older Adults Appendix A

	representation, brief services, preparing legal documents and pro se 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 100% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior
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).

III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

• Low-income

- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

API Legal Outreach's offices are located at 1121 Mission Street in San Francisco. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) <u>Information and Referral</u> the concern is more appropriately referred to another service for assistance
- 2) <u>Advise and Close</u> the legal issue is very easily addressed, advice is provided and the case is closed
- 3) <u>Brief Services</u> the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) <u>Case Acceptance</u> the legal issue warrants more extensive legal representation and a case file is opened, e.g.., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) <u>Income/Nutrition</u>: Supplemental Security Income ("SSI"), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) <u>Long-term Care</u>: Skilled Nursing Facility (SNF) issues, community-based, long-term care services

- 4) <u>Healthcare</u>: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) <u>Protective Services/Elder Abuse/Defense against Conservatorship</u>: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) <u>Consumer</u>: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) <u>Civil Rights</u>: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

For the period 1/1/21 - 6/30/21:

- Grantee will serve <u>40</u> unduplicated clients.
- Grantee will provide <u>1,350</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve <u>80</u> unduplicated clients.
- Grantee will provide <u>2,700</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via on online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25th each year
- 2nd Quarter (covering October, November, December) due January 25th each year
- 3rd Quarter (covering January, February, March) due April 25th each year
- 4th Quarter (covering April, May, June) due July 25th each year

IX. Additional Reporting 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 Service Objectives by the 5th working day of the month for the preceding month.

- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- 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 shall be submitted via the CARBON system.
- D. 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 10th (for January 1-June 30 data
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108

South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San	825 Howard Street, San Francisco, CA 94103
Francisco	
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Ofelia Trevino Analyst, Office of Community Partnerships DAS P.O. Box 7988 San Francisco, CA 94120-7988 (415) 355-3571 Ofelia.Trevino@sfgov.org and Steve Kim Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 (415) 557-6335 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 of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.

B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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	Effective Date of Mod. No. of Mod.	_			·	
9	Program: Legal Services for Older Adu	lts				
	Budget Reference Page No.(s)			7/4/00 6/00/00	7/1/23-6/30/24	Total
	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	11123-0/30/24	rota
12 13	Expenditures Salaries & Benefits	\$67,332	\$134,664	\$134,664	\$134,664	\$471,324
_	Operating Expenses	\$11,795	\$23,640	\$24,260	\$24,260	\$83,955
	Subtotal	\$79,127	\$158,304	\$158,924	\$158,924	\$555,279
16	Indirect Percentage (%)	15%	15%	15%	15%	
	Indirect Cost (Line 16 X Line 15)	\$11,852	\$23,654	\$23,034	\$23,034	\$81,574
	Capital/Subcontractor Expenditures		0101050	04.04 OF 0	\$181,958	\$636,853
	Total Expenditures	\$90,979	\$181,958	\$181,958	\$101,900	4000,000
20	HSA Revenues					
21 22	General Fund(ALLOC UNKNOWN)	\$90,979	\$181,958	\$181,958	\$181,958	\$636,853
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	Total Revenues	\$90,979	\$181,958	\$181,958	\$181,958	\$636,853
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	Prepared by: Dean Ito Taylor/Lorraine Yo	s relephone No.:	510-251-2846 x 140	,		
4(HSA-CO Review Signature:		-			
4	HSA #1		· · · · · · · · · · · · · · · · · · ·			8/27/202

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		Salarie	Salaries & Benefits Detail	its Detail					
					1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	
	Agency Totals	otals	HSA Program	ogram	DAAS	DAAS	DAAS	DAAS	TOTAL
	Annual Full TimeSalary for FTF	ш <i>.</i> ,	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary				
Supervision Attorney	\$70.000		30.00%		\$10,500	\$21,000	\$21,000	\$21,000	\$73,500
Supervising Audurey	\$57,000	2 0	40.00%		\$11.400	\$22,800	\$22,800	\$22,800	\$79,800
oral Accistant/Daralanal	\$46,000	00 1	40.00%		\$9,200	\$18,400	\$18,400	\$18,400	\$64,400
16 Translator/Admin Support	\$50.000	1.00	40.00%		\$10,000	\$20,000	\$20,000	\$20,000	\$70,000
Mananing Attorney	\$88,000	1.00	30.00%		\$13,200	\$26,400	\$26,400	\$26,400	\$92,400
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TOTALS	\$311,000	5.00	180%	0:00	\$54,300	\$108,600	\$108,600	5108,600	\$380,100
FRINGE BENEFIT RATE	24%	and the state of t		1. State of the second se					
EMPLOYEE FRINGE BENEFITS	\$74,640				\$13,032	\$26,064	\$26,064	\$26,064	\$91,224
TOTAL SALARIES & BENEFLTS	\$385.640				\$67,332	\$134,664	\$134,664	\$134,664	\$471,324
37 HSA #2									8/27/2020

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Program: Legal Services for Older Adults (same as Line 9 on HSA #1) Operating Expense Detail TO (same as Line 9 on HSA #1) Operating Expense Detail 7/1/21-6/30/23 7/1/23-6/30/23 7/1/23-6/30/24 (same as Line 9 on HSA #1) Dperating Expense Detail 7/1/21-6/30/21 7/1/21-6/30/23 7/1/23-6/30/24 7/1/23-6/30/24 Expenditure Category TERM 1/1/21-6/30/21 7/1/21-6/30/23 7/1/23-6/30/24 7/1/23-6/30/24 Unitities(Elec, Water, Gas, Phone, Garbage, DSL) \$1/1/21 \$1/1/24 \$3,080 \$3,080 \$3,080 \$3,080 Office Supplies, Postage \$1/1/21 \$1,126 \$3,080			r			
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APPENDIX A

La Raza Centro Legal, Inc.

LEGAL SERVICES FOR OLDER ADULTS

January 1, 2021 – June 30, 2024

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

II. Definitions

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
CARBON	Contracts Administration, Reporting, and Billing Online System
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self- care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self- direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	La Raza Centro Legal, Inc.
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to older individuals 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;
La Raza Centro Legal, Inc. Legal Services for Older Adults Appendix A	1

and (ii) counseling or representation by a nonlawyer 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 se assistance.

LGBTQ+

Minority

An acronym/term used to refer to persons who self-identify as nonheterosexual 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 100% 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.

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.

OAA Older Americans Act

OCP

Older Adult Person who is 60 years or older, used interchangeably with senior

Office of Community Partnerships

Senior

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).

Person who is 60 years or older, used interchangeably with older adult

2

III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

La Raza Centro Legal, Inc.'s offices are located at 474 Valencia St #295, San Francisco, CA 94103. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) <u>Information and Referral</u> the concern is more appropriately referred to another service for assistance
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- 4) <u>Case Acceptance</u> the legal issue warrants more extensive legal representation and a case file is opened, e.g.., elder abuse, consumer fraud, challenging eviction petitions, etc.

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Areas of expertise for legal service Grantees should include at least one of the following:

- 1) <u>Income/Nutrition</u>: Supplemental Security Income ("SSI"), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) Long-term Care: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) <u>Healthcare</u>: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) <u>Protective Services/Elder Abuse/Defense against Conservatorship</u>: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) <u>Consumer</u>: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

For the period 1/1/21 - 6/30/21:

- Grantee will serve <u>50</u> unduplicated clients.
- Grantee will provide <u>1050</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve <u>100</u> unduplicated clients.
- Grantee will provide <u>2100</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

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Completion of quarterly reporting will be done via on online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25th each year
- 2nd Quarter (covering October, November, December) due January 25th each year
- 3rd Quarter (covering January, February, March) due April 25th each year
- 4th Quarter (covering April, May, June) due July 25th each year

IX. Additional Reporting 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 Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- 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 shall be submitted via the CARBON system.
- D. 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 10th (for January 1-June 30 data
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and

adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Ofelia Trevino Program Analyst, Office of Community Partnerships DAS P.O. Box 7988 San Francisco, CA 94120-7988 <u>Ofelia.Trevino@sfgov.org</u>

and

Tahir Shaikh Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 (415) 355-3607 Tahir.Shaikh@sfgov.org

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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 of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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27 OTHER			
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31 TOTAL OPERATING EXPENSE \$12,776 \$23,144	\$23,144	\$23,144	\$82,208
32			
33 HSA #3			

APPENDIX A

Legal Assistance to the Elderly

LEGAL SERVICES FOR OLDER ADULTS

January 1, 2021 – June 30, 2024

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

II. Definitions

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
CARBON	Contracts Administration, Reporting, and Billing Online System
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self- care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self- direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Legal Assistance to the Elderly
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to older individuals 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;
Legal Assistance to the Elderly Legal Services for Older Adults Appendix A	1

and (ii) counseling or representation by a nonlawyer 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 se assistance. An acronym/term used to refer to persons who self-identify as non -LGBTQ+ 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. Having income at or below 100% of the federal poverty line defined Low Income by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. An ethnic person of color who is any of the following: a) Black – a Minority 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. Older Americans Act OAA Office of Community Partnerships OCP Person who is 60 years or older, used interchangeably with senior Older Adult Person who is 60 years or older, used interchangeably with older adult Senior Sexual Orientation and Gender Identity; Ordinance No. 159-16 SOGI amended the San Francisco Administrative Code to require City departments and contractors that provide health care and social services to seek to collect and analyze data concerning the sexual orientation and gender identity of the clients they serve (Chapter 104, Sections 104.1 through 104.9).

III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

Legal Assistance to the Elderly's offices are located at 1663 Mission Street, Suite 225. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) <u>Information and Referral</u> the concern is more appropriately referred to another service for assistance
- 2) <u>Advise and Close</u> the legal issue is very easily addressed, advice is provided and the case is closed
- 3) <u>Brief Services</u> the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- 4) <u>Case Acceptance</u> the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) <u>Income/Nutrition</u>: Supplemental Security Income ("SSI"), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) <u>Long-term Care</u>: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) <u>Healthcare</u>: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) <u>Protective Services/Elder Abuse/Defense against Conservatorship</u>: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

For the period 1/1/21 - 6/30/21:

- Grantee will serve <u>425</u> unduplicated clients.
- Grantee will provide <u>6,173</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve <u>850</u> unduplicated clients.
- Grantee will provide <u>12,345</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via on online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25th each year
- 2nd Quarter (covering October, November, December) due January 25th each year
- 3rd Quarter (covering January, February, March) due April 25th each year
- 4th Quarter (covering April, May, June) due July 25th each year

IX. Additional Reporting 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 Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- 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 shall be submitted via the CARBON system.
- D. 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 10th (for January 1-June 30 data
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and

adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Reanna Albert Program Analyst, Office of Community Partnerships DAS P.O. Box 7988 San Francisco, CA 94120-7988 <u>Reanna.Albert@sfgov.org</u>

and

Ella Lee Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 (415) 355-3607 Ella.Lee@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 of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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7 Name			1	Terr	1
8 Legal Assistance to the Elderly				Jan 2021	Jun 2024
9 (Check One) New Renewal Mo					
10 If modification, Effective Date of Mod. No. of	W00.		· · · · · · · · · · · · · · · · · · ·		
11 Program: Legal services for older adults					
12 Budget Reference Page No.(s)					
13 Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
15					
16 DAS Expenditures					
17 Salaries & Benefits	\$248,930	\$497,859	\$495,679	\$493,448	\$1,735,916
18 Operating Expenses	\$47,754	\$95,509	\$97,689	\$99,920	\$340,872
19 Subtotal	\$296,684	\$593,368	\$593,368	\$593,368	\$2,076,788
20 Indirect Percentage (%)	15%	15%	15%	15%	15%
21 Indirect Cost	\$44,503	\$89,005	\$89,005	\$89,005	\$311,518
26 Capital Expenditure					
27 Sub-Contractor Expenditure					
28 Total DAS Expenditures	\$341,187	\$682,373	\$682,373	\$682,373	\$2,388,306
29				1	
30 Non DAS Expenditures					
31 Salaries & Benefits					
32 Operating Expenses					
33 Subtotal					·
34 Capital/Subcontractor Expenditures		·			
35 Indirect Percentage (%)				-	
36 Indirect Cost 37 Total Non DAS Expenditures					
38					
39 TOTAL DAS AND NON DAS EXPEDITURES	\$341,187	\$682,373	\$682,373	\$682,373	\$2,388,306
40					
41 DAS Revenues					
42 General Fund	\$240,746	\$481,491	\$481,491	\$481,491	\$1,685,219
43 Federal Fund	\$100,441	\$200,882	\$200,882	\$200,882	\$703,087
44					
45					
46					
47					
48					
49		*****	\$682,373	\$682,373	\$2,388,306
50 Total DAS Revenue	\$341,187	\$682,373	\$002,373	4002,515	\$2,000,000
51 50 Non BAS Brunning					
52 Non DAS Revenues					
53 54					
55					
56					
57					
58 Total Non DAS Revenue					
59 TOTAL DAS AND NON DAS REVENUE	\$341,187	\$682,373	\$682,373	\$682,373	\$2,388,306
60					
61 Full Time Equivalent (FTE)					L
63 Prepared by:	Telephone No.:				Date: 5/10/18
64 HSA-CO Review Signature:					
65					
66 HSA #1					10/25/2010

Pro	I I I for a fact of the state	8	c	D						Appendix B, Page 2
	ogram: Legal services for older add	ults							-	Document Date:
- ·	ame as Line 11 on HSA #1)									Document Date.
4										
]										
					Salaries &	Benefits Detall				1
		Agency To	stals	HSA Pr	ogram	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
1	F									
		Annual Full		% FTE funded]				
		Time Salary for FTE	Total FTE	by HSA (Max 100%)	Adjusted FTE	Sudget	Budget	Budget	Budget	Budget
	S Salary	FIE			A005180 FTC 1.00		Dudgo,			
	osition		1.00	100.00%		5810	44.000	11,238	11,238	\$39,333
	ecutive Director	\$112,381	1.00	10.00%	0.10	5619	11,238		31,726	\$111,041
	rector of Liligation	\$94,000	1.00	33.75%	0.34	15863	31,726	31,726	2,595	\$9,083
	pervising Attorney	\$89,000	1.00	2.92%	0.03	1298	2,595	2,595		
	nior Staff Attorney- Elder Abuse	\$94,771	1.00	100.00%	1.00	47386	94,771	94,771	94,771	\$331,699
4 Sta	aff Attorney-Benefits	\$64,770	0.80	75.22%	0.60	24359	48,718	48,718	48,718	\$170,513
	all Attorney-Health	\$83,415	1.00	4.78%	0.05	1993	3,985	3,985	3,985	\$13,948
	aff Attorney-Consumer	\$27,016	0.40	44.48%	0.18	6008	12,016	12,016	12,016	\$42,056
	aff Altorney-Housing	\$64,000	1.00	5.00%	0.05	1600	\$3,200	\$3,200	3,200	\$11,200
	aff Attorney- Financial Abuse	\$68,500	1.00	100.00%	1.00	34250	\$68,500	\$68,500	68,500	\$239,750
	aff Attorney-Intake	\$68,905	1.00	59.77%	0.60	20593	\$41,185	\$41,185	41,185	\$144,148
	ali Allomey-Illake	\$51,500	1.00	40.15%	0.40		\$20,675	\$18,917	17,118	\$67,048
		\$26,804	0.44	91.80%	0.40	****	\$29,712	\$29,712	29,712	\$101,440
	aralegal-Housing		1.00	57.69%	0.40		\$24,607	\$24,607	24,607	\$88,677
	aralegai	\$51,500	1.00		0.38	4286	\$8,571	\$8,571	8,571	\$29,999
_	rants Manger	\$53,000	1.00	16,17%	0,10	74.00	4010	7 0101 1		1
4				744 704	<u>_</u>	2000 750	2404 400	\$399,741	\$397,942	\$1,399,932
	otais L	\$949,562	13.64	741.72%	6.49	\$200,750	\$401,499	\$388'141	370,1060	\$1,000,000
26	5		1			I		1		
/7 Fri	inge Benefits Rate	24.00%	har always and an internet state		t				005 500	0005 004
8 En	mployee Fringe Benefits	\$227,895		Contraction of the second		\$48,180	\$96,360	\$95,938	\$95,506	\$335,984
					Service and the service of the servi					
	otal DAS Salaries and Benefits	A1 177 187	- Children and Children			\$248,930	\$497,859	\$495,679	\$493,448	\$1,735,916
9110	THE DAY Officiates and Dements [\$1,177,457		and the second second second	Sector And And And And And And	0210,000	5401,000	0400,010	Q100,110	
30	Star DAG Balanco and Benenio (\$1,177,457					44 <i>51,</i> 008	5450,073	0100,110	
				[Г		9497,808	3435,013		
	· · · [Annual Full		% FTE			<u>4477,003</u>			
30		Annual Full Time Salary for		% FTE (Max 100%)	Adjusted FTE	Budget	Budget	Budget	Budget	Budget
30 31 No	on DAS Salary	Annual Full	Total FTE	(Max 100%)	Adjusted FTE	Budget				
30 31 No 32 Pc	on DAS Salary osition	Annual Full Time Salary for FTE	Total FTE 1.00	(Max 100%) 100.00%		Budget				
30 31 No 32 Pc 33 Ex	on DAS Salary osition xacutive Diractor	Annual Full Time Salary for FTE \$112,381	Tota) FTE 1.00 1.00	(Max 100%) 100.00%		Budget				
31 No 32 Pc 33 Ex 34 Dir	on DAS Salary osition xacutive Director irector of Litigation	Annual Full Time Salary for FTE \$112,381 \$94,000	Total FTE 1.00 1.00 1.00	(Max 100%) 100.00%		Budget				
30 31 No 32 Pc 33 Ex 34 Dir 35 Su	on DAS Salary osition xecutive Director irector of Litigation upervising Atlorney	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000	Total FTE 1.00 1.00 1.00 1.00	(Max 100%) 100.00%		Budget				
30 31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se	on DAS Salary osition xacutive Director rector of Lifigation upervising Attorney enior Staff Attorney- Elder Abuse	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771	Total FTE 1.00 1.00 1.00 1.00 1.00	(Max 100%) 100.00%		Budget				
30 31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 St	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Staff Attorney- Elder Abuse taff Attorney-Benefits	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770	Total FTE 1.00 1.00 1.00 1.00 1.00 0.80	(Max 100%) 100.00%		Budget				
30 31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 Sta 38 Sta	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Staff Attorney- Elder Abuse taff Attorney-Benefits taff Attorney-Health	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415	Total FTE 1.00 1.00 1.00 1.00 1.00 0.80 -1.00	(Max 100%) 100.00%		Budget				
31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 St 38 St 39 St	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Stalf Attorney- Elder Abuse taff Attorney-Benefits taff Attorney-Health taff Attorney-Consumer	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016	Total FTÉ 1.00 1.00 1.00 1.00 1.00 0.80 1.00 0.80 0.40	(Max 100%) 100.00%		Budget				
31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 St 38 St 39 St	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Staff Attorney- Elder Abuse taff Attorney-Benefits taff Attorney-Health	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415	Total FTÉ 1.00 1.00 1.00 1.00 0.80 1.00 0.80 1.00 0.40 1.00	(Max 100%) 100.00%		Budget				
31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 Sta 38 Sta 39 Sta 40 Sta	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Stalf Attorney- Elder Abuse taff Attorney-Benefits taff Attorney-Health taff Attorney-Consumer	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016	Total FTÉ 1.00 1.00 1.00 1.00 0.80 1.00 0.80 0.40 0.40 1.00	(Max 100%) 100.00%		Budget				
31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 Sta 38 Sta 39 Sta 40 Sta 41 Sta	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Staff Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Health taff Attorney-Consumer taff Attorney-Housing	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016	Tota) FTE 1.00 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00	(Max 100%) 100.00%		Budget				
30 31 No 32 Pc 33 Ex 33 Ex 34 Dir 35 Su 36 Se 37 Sta 38 Sta 39 Sta 40 Sta 41 Sta 42 Sta	on DAS Salary osition xecutive Director irector of Litigation upervising Atlorney enior Staff Atlorney-Elder Abuse taff Atlorney-Benefits taff Atlorney-Benefits taff Atlorney-Housing taff Atlorney-Housing taff Atlorney-Intake	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$66,500 \$68,905	Tota) FTE 1.00 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00	(Max 100%) 100.00%		Budget				
30 31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 Sta 38 Sta 39 Sta 40 Sta 41 Sta 42 Sta 43 Int	on DAS Salary osition xacutive Director irector of Liligation upervising Attorney enior Staff Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Health taff Attorney-Health taff Attorney-Housing taff Attorney-Intake taff Attorney-Intake	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$68,500 \$68,500	Total FTE 1.00 1.00 1.00 1.00 1.00 0.80 0.40 1.00 0.40 1.00 1.00 1.00 1.00 1.00	(Max 100%) 100.00%		Budget				
31 No 31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 Stats 38 Stit 39 Stats 41 Stats 42 Stats 43 Int 444 Pas	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Stalf Attorney-Elder Abuse taff Attorney-Health taff Attorney-Health taff Attorney-Housing taff Attorney-Housing taff Attorney-Financial Abuse taff Attorney-Intake tafk Attorney-Intake tafk Attorney-Intake taff Attorney-Intake taff Attorney-Intake	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$68,905 \$\$51,500	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00	(Max 100%) 100.00%		Budget				
30 31 No 31 Pcc 33 Ex 32 Pcc 33 Ex 33 Ex 34 Dir 35 Su 36 Se 36 Se Si 33 37 Stat Si Si 38 Si Si Si Si 40 Stat Si Si Si 42 Si Int Si Si 44 Pa A Si Si	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney. Edder Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Health taff Attorney-Health taff Attorney-Consumer taff Attorney-Consumer taff Attorney-Financial Abuse taff Attorney-Intake take Paralegal aralegal-Housing aralegal	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$84,770 \$83,415 \$27,016 \$64,000 \$68,500 \$68,500 \$51,500	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 0.44 1.00	(Max 100%) 100.00%		Budget				
30 31 No 32 Pcc 33 Ex 33 Ex 34 Dir 35 Su 34 Dir 35 Su 36 Se 37 St 39 St 39 St 41 St 42 St 42 St 43 Inth 44 Per 44 St 44 St 44 St 44 St 44 St 44 G 34 54 G 34 35 St 35 St 35 St 35 St 36 St 36 St 36 St 36 St 36 St 37 St 36 St 36 St 37 St 36 St 37 St 37 St 36 St 36 St 37 St 36 St 36 St 37 St 36 St 36 St	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Staff Attorney-Elder Abuse taif Attorney-Benefits taff Attorney-Benefits taff Attorney-Housing taff Attorney-Consumer taff Attorney-Intake taff Attorney-Intake tatke Paralegal aralegal-Housing araalegal Grants Manger	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$68,500 \$68,905 \$51,500 \$26,804 \$51,500	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00 1.0	(Max 100%) 100.00%	1.00	Budget				
31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 St 38 St 39 St 31 St 32 St 33 St 34 Dir 35 St 36 Se 37 St 38 St 39 St 44 Ps 443 Int 444 Ps 446 G 447 Tc	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Staff Attorney-Elder Abuse taif Attorney-Benefits taff Attorney-Benefits taff Attorney-Housing taff Attorney-Consumer taff Attorney-Intake taff Attorney-Intake tatke Paralegal aralegal-Housing araalegal Grants Manger	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$84,770 \$83,415 \$27,016 \$64,000 \$68,500 \$68,500 \$51,500	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00 1.0	(Max 100%) 100.00%	1.00	Budget				
31 No 32 Pc 33 Ex 34 Dir 35 Su 36 Se 37 St 38 St 39 St 30 St 33 St 34 Dir 35 Su 36 Se 37 St 38 St 39 St 41 Su 44 Pe 445 Pe 446 G 447 Tc 448 Mathematical Su	on DAS Salary osition xecutive Director irector of Litigation upervising Attorney enior Staff Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Benefits taff Attorney-Housing taff Attorney-Housing taff Attorney-Intake taff Attorney-Intake	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$68,500 \$68,905 \$51,500 \$26,804 \$51,500	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00 1.0	(Max 100%) 100.00%	1.00	Budget				
31 No 32 Pc 33 Ex 33 Ex 33 Ex 33 Ex 34 Dir 35 Su 36 Se 37 Stat 38 Stat 41 Stat 41 Pa 43 Int 445 Pa 46 G 47 T cc 48 Pa 49 Fr	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Stalf Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Health taff Attorney-Housing taff Attorney-Housing taff Attorney-Housing taff Attorney-Intake tafk Attorney-Intake taff Attorney-I	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$68,500 \$68,905 \$51,500 \$26,804 \$51,500	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00 1.0	(Max 100%) 100.00%	1.00	Budget				
31 No 32 Pc 33 Ex 33 Ex 33 Ex 33 Ex 34 Dir 35 Su 36 Se 37 Stat 38 Stat 41 Stat 41 Pa 43 Int 445 Pa 46 G 47 T cc 48 Pa 49 Fr	on DAS Salary osition xecutive Director irector of Litigation upervising Attorney enior Staff Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Benefits taff Attorney-Housing taff Attorney-Housing taff Attorney-Intake taff Attorney-Intake	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$68,500 \$68,905 \$51,500 \$26,804 \$51,500	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00 1.0	(Max 100%) 100.00%	1.00	Budget				
30 31 No 32 Pc 33 Ex 33 Ex 36 Se 37 State 33 34 Diri 35 Su 36 Se 37 State 39 State 39 State 39 State 39 State 39 State 31 Int 41 State 44 Pe 44 44 Pe 44 44 Pe 44 <td< td=""><td>on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Stalf Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Health taff Attorney-Housing taff Attorney-Housing taff Attorney-Housing taff Attorney-Intake tafk Attorney-Intake taff Attorney-I</td><td>Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$66,500 \$66,500 \$51,500 \$51,500 \$26,804 \$51,500 \$26,804</td><td>Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 1.00 1.00</td><td>(Max 100%) 100.00%</td><td>1.00</td><td>Budget</td><td></td><td></td><td></td><td></td></td<>	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Stalf Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Health taff Attorney-Housing taff Attorney-Housing taff Attorney-Housing taff Attorney-Intake tafk Attorney-Intake taff Attorney-I	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$66,500 \$66,500 \$51,500 \$51,500 \$26,804 \$51,500 \$26,804	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 1.00 1.00	(Max 100%) 100.00%	1.00	Budget				
31 No 32 Pcc 33 Ex 34 Dir 35 Sc 363 St 37 St 383 St 393 St 393 St 393 St 393 St 393 St 31 Int 41 St 42 St 44 Pe 445 Pe 445 Pe 446 Fr 50 Er 50 Er	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Stalf Attorney-Elder Abuse taff Attorney-Health taff Attorney-Health taff Attorney-Housing taff Attorney-Housing taff Attorney-Housing taff Attorney-Intake taff Attorney-Int	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$68,500 \$68,905 \$51,500 \$26,804 \$51,500	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 1.00 1.00	(Max 100%) 100.00%	1.00	Budget				
31 No 32 Pcc 33 Ex 34 Dir 35 Sc 363 St 37 St 383 St 393 St 393 St 393 St 393 St 393 St 31 Int 41 St 42 St 44 Pe 445 Pe 445 Pe 446 Fr 50 Er 50 Er	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney. Elder Abuse taff Attorney-Benefits taff Attorney-Health taff Attorney-Health taff Attorney-Consumer taff Attorney-Housing taff Attorney-Housing taff Attorney-Intake taff Attorney	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$66,500 \$66,500 \$51,500 \$51,500 \$26,804 \$51,500 \$26,804	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 1.00 1.00	(Max 100%) 100.00%	1.00	Budget				
31 No 32 Exp. 33 4 33 4 34 Dirivitation 35 Substrate 36 Substrate 37 State 38 State 39 State 31 Mark 32 Exp. 33 A 33 A 33 A 34 Dirivitation 35 State 36 State 37 State 38 State 39 State 31 Mark 32 State 33 A 340 State 31 Interview 32 Interview 33 Interview 34 A 35 France 36 France 37 Transition 38 State	on DAS Salary osition xaculive Director irector of Litigation upervising Attorney enior Staff Attorney-Elder Abuse taif Attorney-Benefits taif Attorney-Benefits taif Attorney-Consumer taif Attorney-Consumer taif Attorney-Housing taff Attorney-Intake tatke Paralegal aralegal-Housing aralegal-Hou	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$66,500 \$66,500 \$51,500 \$51,500 \$26,804 \$51,500 \$26,804	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 1.00 1.00	(Max 100%) 100.00%	1.00	Budget			Budget	Budget
31 No 32 Pc 33 34 35 Su 36 Se 37 Sti 38 Sti 39 Sti 31 No 32 Pc 33 Sti 33 Sti 34 Dir 35 Su 36 Se 37 Sti 38 Sti 39 Sti 41 Sti 42 Int 423 Int 445 Pe 429 Fr 50 Tr 51 Be 52 To	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Staff Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Heatth taff Attorney-Housing taff Attorney-Housing taff Attorney-Housing taff Attorney-Intake take Paralegal arategal arategal arategal arats Manger otals ringe Benefits Rate imployee Fringe Benefits otal Non DAS Salaries and lenefits	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$68,905 \$51,500 \$551,500 \$551,500 \$551,500 \$553,000 \$949,552	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00 1.0	(Max 100%) 100.00%	1.00	Budget	Budget	Budget		Budget
31 No 31 No 32 34 33 35 33 36 33 36 33 36 33 37 33 38 34 Dirinitation 35 Substrate 36 Substrate 37 State 38 Substrate 39 State 41 Substrate 42 State 43 Her 44 Pare 447 To 50 To 51 Br 52 To 53 St	on DAS Salary osition xaculive Director irector of Litigation upervising Attorney enior Staff Attorney-Elder Abuse taif Attorney-Benefits taif Attorney-Benefits taif Attorney-Consumer taif Attorney-Consumer taif Attorney-Housing taff Attorney-Intake tatke Paralegal aralegal-Housing aralegal-Hou	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$66,500 \$66,500 \$51,500 \$51,500 \$26,804 \$51,500 \$26,804	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00 1.0	(Max 100%) 100.00%	1.00	Budget	Budget	Budget	Budget	Budget
31 No 32 34 5 333 34 5 36 Se 33 37 38 5 38 39 0 39 10 5 39 10 5 30 10 5 31 10 5 32 35 5 31 10 10 32 33 34 5 33 34 5 5 33 34 5 5 33 34 5 5 34 44 10 10 35 52 1 1	on DAS Salary osition xacutive Director irector of Litigation upervising Attorney enior Staff Attorney-Elder Abuse taff Attorney-Benefits taff Attorney-Heatth taff Attorney-Housing taff Attorney-Housing taff Attorney-Housing taff Attorney-Intake take Paralegal arategal arategal arategal arats Manger otals ringe Benefits Rate imployee Fringe Benefits otal Non DAS Salaries and lenefits	Annual Full Time Salary for FTE \$112,381 \$94,000 \$89,000 \$94,771 \$64,770 \$83,415 \$27,016 \$64,000 \$68,905 \$51,500 \$551,500 \$551,500 \$551,500 \$553,000 \$949,552	Total FTE 1.00 1.00 1.00 1.00 0.80 1.00 0.40 1.00 1.00 1.00 1.00 1.00 1.0	(Max 100%) 100.00%	1.00	Budget	Budget	Budget	Budget	Budget

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1	Program: Legal services for older adults					Appendix B, Pag
	(Same as Line 11 on HSA #1)					Document Dat
3	(04,75 25 2.16 11 011 121 14 1)					
4						
5		Operati	ng Expense Detai	I		
6						
7		1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
9						
10	DAS Operating Expenses					
	Expenditure Category					
	Rental of Property	\$26,968	\$53,936	\$55,284	\$56,667	\$192,8
	Utililies (Elec, Water, Gas, Phone, Garbage)	\$2,588	\$ \$5,17	6 \$5,280	\$5,385	\$18,4
	Office Supplies, Postage	\$5,534	\$11,068	\$11,412	\$11,464	\$39,4
_	Building Maintenance Supplies and Repair					
	Printing and Reproduction	\$76	7 \$1,53	\$1,564	\$1,595	\$5,4
	Insurance	\$4,37	\$8,74	5 \$8,920	\$9,098	\$31,1
	Staff Training	\$1,000	\$2,00	\$2,040	\$2,081	\$7,1
	Staff Travel-(Local & Out of Town)	\$24	7 \$493	3 \$503	\$513	\$1,7
20	Rental of Equipment, Maintence and repair	\$1,390	\$2,78	5 \$2,841	\$2,898	\$9,9
21	Law Library Maintenance	\$2,37	\$4,65	7 \$4,657	\$4,657	\$16,3
22	State Bar Dues	\$1,00	\$2,00	\$2,040	\$2,081	\$7,1
23	Professional Memberships	\$48	2 \$96	3 \$982	\$1,002	\$3,4
24	Volunteer Regonition	\$32	7 \$65	3 \$666	\$679	\$2,3
25	Cloud-based services	\$50	0 \$1,00	0 \$1,000	\$1,000	\$3,5
26	Client Litigation Costs	\$20	0 \$50	0 \$500	\$800	\$2,0
27	Consultant					
28						
	>					
31	Total DAS Operating Expenses	\$47,75	4 \$95,50	9 \$97,689	\$99,920	\$340,8
32	<u> </u>					
	Non DAS Operating Expenses					
	Expenditure Category					
	Rental of Property					
_	Utilities (Elec, Water, Gas, Phone, Garbage)					
37		•			-	·
<u> </u>	Building Maintenance Supplies and Repair					
38		b				.
	Printing and Reproduction					
39	-					
39 40	Printing and Reproduction Insurance Staff Training					
39 40	Insurance Staff Training					
39 40 41 42	Insurance Staff Training					· · · · · · · · · · · · · · · · · · ·
39 40 41 42 43	Insurance Staff Training Staff Travel-(Local & Out of Town)					
39 40 41 42 43 47	Insurance Staff Training Staff Travel-(Local & Out of Town) Rental of Equipment					· · · · · · · · · · · · · · · · · · ·
39 40 41 42 43 47	Insurance Staff Training Staff Travel-(Local & Out of Town) Rental of Equipment Consultant					
39 40 41 42 43 47 48	Insurance Staff Training Staff Travel-(Local & Out of Town) Rental of Equipment <u>Consultant</u> Consultant A					
39 40 41 42 43 47 48 51	Insurance Staff Training Staff Travel-(Local & Out of Town) Rental of Equipment Consultant Consultant A Total Non DAS Operating Expenses					
39 40 41 42 43 47 48	Insurance Staff Training Staff Travel-(Local & Out of Town) Rental of Equipment Consultant Consultant A Total Non DAS Operating Expenses					
39 40 41 42 43 47 48 51 52	Insurance Staff Training Staff Travel-(Local & Out of Town) Rental of Equipment Consultant Consultant A Total Non DAS Operating Expenses	\$47,75		99 \$97,689	\$99,920	\$340,

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APPENDIX A

Open Door Legal

LEGAL SERVICES FOR OLDER ADULTS

January 1, 2021 – June 30, 2024

I. Purpose

The purpose of this grant is to ensure the rights and entitlements of older adults by providing legal assistance.

II. Definitions

California State Bar	The State Bar of California is the regulatory agency for the State's lawyers, charged with admitting and disciplining attorneys.
CARBON	Contracts Administration, Reporting, and Billing Online System
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self- care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self- direction; c) Cognitive functioning, and emotional adjustment
Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
Grantee	Open Door Legal
HSA	Human Services Agency of City and County of San Francisco
Legal Assistance	Legal advice and representation provided by an attorney to older individuals 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;
Door Legal Services for Older Adults	1

Open Door Legal Legal Services for Older Ac Appendix A

	and (ii) counseling or representation by a nonlawyer 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 se 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 100% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OAA	Older Americans Act
OCP	Office of Community Partnerships
Older Adult	Person who is 60 years or older, used interchangeably with senior
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).

III. Target Population

According to the federal mandates of the Older Americans Act, services must target clients who are members of one or more of the following groups that have been identified as demonstrating the greatest economic and social need. In particular:

- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

Open Door Legal's offices are located at 4634 3rd Street, 60 Ocean Avenue, and 1111 Buchanan Street. Services are offered Monday through Friday during regular business hours.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

Clients seeking legal services will go through an initial screening process. Legal providers will then categorize the services they provide into one of the following four modules:

- 1) <u>Information and Referral</u> the concern is more appropriately referred to another service for assistance
- 2) <u>Advise and Close</u> the legal issue is very easily addressed, advice is provided and the case is closed
- 3) <u>Brief Services</u> the client is in need of assistance to prepare legal correspondence, fill out an official form, review legal documents, etc.
- <u>Case Acceptance</u> the legal issue warrants more extensive legal representation and a case file is opened, e.g., elder abuse, consumer fraud, challenging eviction petitions, etc.

Grantee will be provided with a copy of the California Department of Aging's California Statewide Guidance for Legal Assistance. Grantee is expected to use these Guidelines in the provision of OAA legal services. While non-binding, the Guidelines should be considered for guidance and technical assistance in the provision of services.

Areas of expertise for legal service Grantees should include at least one of the following:

- 1) <u>Income/Nutrition</u>: Supplemental Security Income ("SSI"), Social Security, pensions/retirement, CalFresh/Supplemental Nutrition Assistance Program (SNAP), unemployment
- 2) Housing/Utilities: Tenant rights, real property, utilities
- 3) <u>Long-term Care</u>: Skilled Nursing Facility (SNF) issues, community-based, long-term care services
- 4) <u>Healthcare</u>: MediCal, Medicare, managed care, provider/services access, private insurance
- 5) <u>Protective Services/Elder Abuse/Defense against Conservatorship</u>: Conservatorship issues with a focus on defending older persons against guardianship as called for in the OAA § 321(a)(6)), restraining orders, abuse/neglect, exploitation, advanced planning/autonomy/advance directives
- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) Civil Rights: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

For the period 1/1/21 - 6/30/21:

- Grantee will serve 29 unduplicated clients.
- Grantee will provide <u>800</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve <u>58</u> unduplicated clients.
- Grantee will provide <u>1,600</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.
- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via on online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25th each year
- 2nd Quarter (covering October, November, December) due January 25th each year
- 3rd Quarter (covering January, February, March) due April 25th each year
- 4th Quarter (covering April, May, June) due July 25th each year

IX. Additional Reporting 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 Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- 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 shall be submitted via the CARBON system.
- D. 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 10th (for January 1-June 30 data
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and

adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Reanna Albert Program Analyst, Office of Community Partnerships DAS P.O. Box 7988 San Francisco, CA 94120-7988 reanna.albert@sfgov.org

and

Ella Lee Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 (415) 355-3607 ella.lee@sfgov.org

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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 of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

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1				App Document Date:	endix B, Page 1
2				Document Date:	December 2020
3	IMAN SERVICES AGE				
		OGRAM			
5	DIFK	OGRAM			
6				Term	
7 Name			1	Jan 2021 - Ju	n 2024
8 Open Door Legal 9 (Check One) Newx Renewal	Nodification				
	of Mod.				
To in modification, checuve bate of Mod.					
11 Program: Legal services for older adults					
12 Budget Reference Page No.(s)					
13 Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
15					
16 DAS Expenditures					
17 Salaries & Benefits	\$48,001	\$96,001	\$96,001	\$96,001	\$336,004
18 Operating Expenses	\$15,497	\$30,995	\$30,995	\$30,995	\$108,482
19 Subtotal	\$63,498	\$126,996	\$126,996	\$126,996	\$444,486
20 Indirect Percentage (%)	10.00%	10.00%	10.00%	10.00%	10.00
21 Indirect Cost	\$6,350	\$12,700	\$12,700	\$12,700	\$44,450
26 Capital Expenditure					
27 Sub-Contractor Expenditure					
28 Total DAS Expenditures	\$69,848	\$139,696	\$139,696	\$139,696	\$488,930
29					
30					
31 DAS Revenues					
32 General Fund	\$69,848	\$139,696	\$139,696	\$139,696	\$488,93
33					
34					
35					
36					
37					
38					
39					
40 Total DAS Revenue	\$69,848	\$139,696	\$139,696	\$139,696	\$488,93
41					
42 Non DAS Revenues					
43					
44					
45					
46					
47					
48 Total Non DAS Revenue					
				6400.000	\$488,93
49 TOTAL DAS AND NON DAS REVENUE	\$69,848	\$139,696	\$139,696	\$139,696	\$488,93
50					
51 Full Time Equivalent (FTE)				_	ate: 11/2/2020
53 Prepared by: Rachel Mellby	Telephone No.:	415-851-0314			ate. 11/2/2020
54 HSA-CO Review Signature:					
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 Program: Legal services for older adults (Same as Line 11 on HSA #1) 								Document Da	Document Date: December 2020
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L) C			Salaries é	Salaries & Benefits Detail	ail		A WW - 1 111		
0 2	Agency Totals	Totals	HSAP	HSA Program	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
	Annual Full Time Salary for ETE	Total FTF	% FTE funded by HSA (Max 100%)	Adiusted FTE	Budaet	Budget	Budget	Budget	Budget
	\$84 000	0.46	50.00%			\$19,320	\$19,320	\$19,320	\$67,620
	\$77.000	0.46	50.00%	-		\$17,710		\$17,710	\$61,985
11 Consumer Attorney - Philip Green	\$81.500	0.34	50.00%			\$13,855	\$13,855	\$13,855	\$48,493
12 Senior Staff Attomev - Tara Macomber	\$86,000	0.15				\$6,450	\$6,450	\$6,450	\$22,575
13 I ead Employment Attorney - I indsey Pace	\$81.100	0.14		0.07	\$2,839	\$5,677	\$5.677	\$5,677	\$19,870
	\$77.000	0.11		0.06		\$4,235		\$4,235	\$14,823
15 Employment & Civil I thration Paralegal - Brenda Falcon Ramos		0.10			\$1,563	\$3,125	\$3,125	\$3,125	\$10,938
16 Imministration/Elder I aw Daralegal - Jenny Salas		0.10			\$1,563	\$3,125		\$3,125	\$10,938
	\$81.500	0.09				\$3,668		\$3,668	\$12.838
	\$87,000	0.05				\$2,175	\$2,175	\$2,175	\$7,613
19 Allocated Shared salaries (7.2 FTEs, total \$502,500)	\$69,792	06.0	%00'0	0.00	•				
20									
21									
					620 670	040 240	\$70 340	579.340	\$277.690
23 Totals	\$849,892	2.90	200,00%	1.00		010.0	200		
25 Fringe Benefits Rate	21.00%						440 004	615 251	S58 314
26 Employee Fringe Benefits	\$178,477				\$8,331	200,00			
27 Total DAS Salaries and Benefits	\$1,028,369				\$48,001	\$96,001	\$96,001	\$96,001	\$336,004
29 HSA #2	-								Date: 11/2/2020
28 AGR 82									
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0 ~	- 1			1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
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10	DAS Operating Expenses					·		
7	Expenditure Category							
5	Rental of Property			\$3,290	6,580.00	6,580.00	6,580.00	\$23,030
13		age)		\$1,246	2,492.00	2,492.00	2,492.00	\$8,722
4	Office Supplies, Postage			\$165	331.00	331.00	331.00	\$1,158
15		oair				1		
16				\$257	514.00	514.00	514.00	\$1,799
1	_			\$6,357	12,714.00	12,714.00	12,714.00	\$44,499
18				\$951	1,901.00	1,901.00	1,901.00	\$6,654
6				\$103	207.00	207.00	207.00	\$724
20				\$110	220.00	220.00	220.00	\$770
3				\$788	1,575.00	1,575.00	1,575.00	\$5,513
22				\$1,168	2,336.00	2,336.00	2,336.00	\$8,176
23				\$1,007	2,015.00	2,015.00	2,015.00	\$7,052
24				\$55	110.00	110.00	110.00	\$385
25								
26	S Consultant							
27	7 N/A							
28								
29								
ର	30 Total DAS Operating Expenses			\$15,497	\$30,995	\$30,995	\$30,995	\$108,482
31 32								Date: 11/2/2020

APPENDIX A

UC Hastings College of the Law

LEGAL SERVICES FOR OLDER ADULTS

January 1, 2021 – June 30, 2024

I. Purpose

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Grantee	UC Hastings College of the Law
HSA	Human Services Agency of City and County of San Francisco
 Legal Assistance	Legal advice and representation provided by an attorney to older individuals 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;
ings College of the Law ervices for Older Adults	1

Legal Service Appendix A

	and (ii) counseling or representation by a nonlawyer 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 se assistance.
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- Low-income
- Limited English proficiency
- Minority
- Frail
- Member of LGBTQ+ Community

IV. Eligibility for Services

- 1) A resident of San Francisco and
- 2) Aged 60 and above

V. Location and Time of Services

UC Hastings College of the Law – Medical Legal Partnership for Seniors' administrative offices are located at 200 McAllister Street. Services are offered Monday through Friday during regular business hours. Services are delivered via legal clinics at select hospitals and health clinics as well as home-visits throughout the City.

VI. Description of Services

Legal service providers will help eligible clients with a variety of legal issues which may include benefit appeals, eviction prevention, consumer fraud/issues, elder abuse prevention, simple will preparation, disability planning and advance directives, debt collection issues, and immigration matters. Legal service providers will often work in conjunction with other service providers to carefully assess and triage client needs.

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- 6) Consumer: Bankruptcy/debt, contracts/warranties, scams/identity theft
- 7) <u>Civil Rights</u>: Limited English Proficient (LEP) rights, discrimination, immigration

Clients can expect that the legal service provider is experienced and knowledgeable about working with an older adult population. Grantee is expected to keep up with changes in the law that affect older adults, particularly in the issue areas in which services are provided. Grantee will further assure that services delivered are consistent with professional standards for this service. Grantee should be as culturally and linguistically competent as possible to serve an ethnically diverse population.

Legal services provided and to be reported under this grant will meet the definition of Legal Assistance as described in the Definitions section above. Legal Assistance will be recorded by number of hours of Legal Assistance provided.

Grantee agrees to meet on a quarterly basis or as needed with other legal service providers and the Office of Community Partnerships staff to help develop and maintain a comprehensive citywide approach to legal service programs funded by DAS.

Grantee will assign staff to help in the planning, development, and distribution of a quarterly legal services newspaper in conjunction with other DAS legal service providers. The newsletter will serve as an outreach and educational tool. Content will be printed in multiple languages and cover legal topics most relevant to the target population.

***Grantee shall continue to follow guidance in or instructions from health care providers, the Centers for Disease Control and Prevention (CDC), California Department of Public Health (CDPH), and local health departments relating to COVID-19. If there are contradictory requirements between the most current CDC, CDPH, and local health department guidance or health orders, providers should follow the strictest requirements. These requirements shall be followed with the intent to maximize the health and safety of Grantee staff and clients receiving services.

VII. Service Objectives

For the period 1/1/21 - 6/30/21:

- Grantee will serve <u>75</u> unduplicated clients.
- Grantee will provide <u>937</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

On an annual basis, starting July 1, 2021:

- Grantee will serve <u>150</u> unduplicated clients.
- Grantee will provide <u>1,875</u> units of service of Legal Assistance. A unit is one hour of Legal Assistance.

VIII. Outcome Objectives

Grantees will participate in a quarterly reporting process designed by Office of Community Partnership (OCP) staff. Reporting on outcomes through this framework will demonstrate and measure the impact, outcomes, and results of legal services provided. Outcome measures originally developed by the State Bar of California serve as the basis for this reporting framework.

Collecting outcomes through this manner will allow DAS and Grantee to track positive outcomes in a particular contract year as well as comparing the outcomes from year to year. Results may help establish benchmarks for performance in future years.

Grantee will, on a quarterly basis, complete and submit to OCP a report on program performance which includes the following:

- Total clients served including aggregate demographic information
- Total hours of legal assistance provided.
- Total number of cases opened during the quarter
- Total number of cases closed during the quarter
- Categorization of level of service for each case closed during the quarter (Information and Referral, Advise and Close, Brief Service, Case Acceptance).
- Recording of each case closed into standardized categories based on legal issue assisted with (e.g. housing, income maintenance, consumer/finance).
- Categorization of each case closed within a series of standardized outcomes (e.g. obtained, preserved, or increased disability or age related benefit; prevented loss of current housing, etc.) as defined by the State Bar of California.

- Community education, outreach efforts, and client narratives

Completion of quarterly reporting will be done via on online portal developed and supported by OCP analyst staff. Reporting periods and deadlines will be as follows:

- 1st Quarter (covering July, August, September) due October 25th each year
- 2nd Quarter (covering October, November, December) due January 25th each year
- 3rd Quarter (covering January, February, March) due April 25th each year
- 4th Quarter (covering April, May, June) due July 25th each year

IX. Additional Reporting 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 Service Objectives by the 5th working day of the month for the preceding month.
- B. Monthly reports must be entered into the Contracts Administration, Reporting, and Billing Online (CARBON) system and include Service Objectives
- 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 shall be submitted via the CARBON system.
- D. 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 10th (for January 1-June 30 data
- E. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- F. Grantee program staff will complete the California Department of Aging (CDA) Security Awareness Training on an annual basis; Grantee will maintain evidence of staff completion of this training.
- G. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable.
- H. Pursuant to California Department of Aging requirement, Grantor reserves the right to reduce funding available for this contract in the event that actual costs are below funding levels initially budgeted for the delivery of services.
- I. Grantee will develop a Grievance Policy consistent with Office on the Aging Program Memorandum #33 - Consumer Grievance Policy.
- J. Through the Older Americans Act Area Plan development process, the City of San Francisco identifies "Focal Points" which are designed to help older adults and

adults with disabilities connect to services throughout the City. These Focal Points are:

Designated Community Focal Point	Address
Western Addition Senior Center (BHPMSS)	1390 1/2 Turk St, San Francisco, 94115
Bayview Senior Connections (BHPMSS)	1753 Carroll Ave, San Francisco, CA 94124
OMI Senior Center (CCCYO)	65 Beverly St, San Francisco, 94132
Richmond Senior Center (GGSS)	6221 Geary Blvd, San Francisco, 94121
Mission Neighborhood Centers	362 Capp St, San Francisco, CA 94110
30th Street Senior Center (On Lok)	225 30th St, San Francisco, 94131
Openhouse Bob Ross LGBT Senior Center	65 Laguna St, San Francisco, CA 94102
Downtown SF Senior Center (NCPHS)	481 O'Farrell St, San Francisco, 94102
Aquatic Park Senior Center (SFSC)	890 Beach St, San Francisco, 94109
Self-Help for the Elderly	601 Jackson St, San Francisco, 94133
Geen Mun Activity Center (SHE)	777 Stockton St, San Francisco, 94108
South Sunset Activity Center (SHE)	2601 40th Ave, San Francisco, 94116
West Portal Clubhouse (SHE)	131 Lenox Way, San Francisco, 94127
Toolworks	25 Kearny St, San Francisco, 94108
Independent Living Resource Center San Francisco	825 Howard Street, San Francisco, CA 94103
DAS Benefits and Services Hub	2 Gough St, San Francisco, 94103

K. For assistance with reporting requirements, submission of reports, or other questions related to this grant please contact:

Reanna Albert Program Analyst, Office of Community Partnerships DAS P.O. Box 7988 San Francisco, CA 94120-7988 reanna.albert@sfgov.org

and

Ella Lee Contract Manager Human Services Agency PO Box 7988 San Francisco, CA 94120-7988 (415) 355-3607 ella.lee@sfgov.org

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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 of provision of the California Department of Aging (CDA) Security Awareness training to staff; 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 directors list and whether services are provided appropriately according to Sections VI and VII, the log of service units which are based on the hours of scheduled activities; sign-in sheets of consumers who participated in each activity; documentation that shows reported units of service are based on scheduled activities at the site, not activities that are always available at the facility such as cards or pool; translation and social services are based on staff hours.
- B. <u>Fiscal Compliance and Contract Monitoring</u>: Fiscal monitoring will include review of the Grantee's organizational budget, 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 the Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, MOUs, the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

1						pendix B, Page 1
2					Document Date:	December 2020
3	HU	MAN SERVICES AGE	NCY BUDGET §	SUMMARY		
5			ROGRAM			
6						
7	Name				Term	
8	UC Hastings College of the Law	· · · · · · · · · · · · · · · · · · ·			Jan 2021 - Ju	Jn 2024
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_	Program: Legal services for older adults Budget Reference Page No.(s)					
	Budget Reference Page No.(s) Program Term	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
13 1	Program Lenn	I HELL MONTH				
16	DAS Expenditures					
	Salaries & Benefits	\$64,488	\$128,975	\$128,975	\$128,975	\$451,413
	Operating Expenses	\$4,389	\$8,779	\$8,779	\$8,779	\$30,726
19	Subtotal	\$68,877	\$137,754	\$137,754	\$137,754	\$482,139
	Indirect Percentage (%) (max 12%)	12.00%	12.00%	12.00%	12.00%	12.00%
	Indirect Cost	\$8,265	\$16,530	\$16,530	\$16,530	\$57,855
	Capital Expenditure					
-	Sub-Contractor Expenditure	\$77,142	\$154,284	\$154,284	\$154,284	\$539,994
28 29	Total DAS Expenditures Non DAS Expenditures		\$104,604	ΨΙΟΤΙΣΟΤ		
	Non DAS Expenditures Salaries & Benefits	\$23,144	\$34,544	\$34,544	\$34,544	\$126,776
	Operating Expenses		•-··		· · ·	
	Subtotal	\$23,144	\$34,544	\$34,544	\$34,544	\$126,776
	Indirect Percentage (%)					
	Indirect Cost (Line 33 X Line 34)					
	Capital Expenditure					
	Sub-Contractor Expenditure					\$496 776
	Total Non DAS Expenditures	\$23,144	\$34,544	\$34,544	\$34,544	\$126,776
38	Euronditurop	\$100,286	\$188,828	\$188,828	\$188,828	\$666,770
39 40	Total DAS & Non Expenditures					
40 41	ł		1			
	DAS Revenues					
	General Fund	\$77,142	\$154,284	\$154,284	\$154,284	\$539,994
44						
45						
46						
47						
48 49						
49 50						
	Total DAS Revenue	\$77,142	\$154,284	\$154,284	\$154,284	\$539,994
52						
	Non DAS Revenues					
54						
	UC Hastings- In Kind	\$10,472	\$27,744	\$27,744	\$27,744	\$93,704
		\$6,800	\$6,800	\$6,800	\$6,800	\$27,200
57				· · · · · · · · · · · · · · · · · · ·		
58 59	Total Non DAS Revenue	\$17,272	\$34,544	\$34,544	\$34,544	\$120,904
58	Total Non DAS Revenue	<u>\</u>	Ψυτ.υ.			*
60	TOTAL DAS AND NON DAS REVENUE	\$94,414	\$188,828	\$188,828	\$188,828	\$660,898
61						
	Full Time Equivalent (FTE)					
64	Prepared by:	Telephone No.:	······		D	Date:
0.0	HSA-CO Review Signature:					
65	INOA-CO Review orginature.					

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1	Program: Legal services for older ad	luits							• •	pendix B, Page 2
2	Same as Line 11 on HSA #1)								Document Date:	December 2020
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4						• • ··· -				
5				1	Salaries	& Benefits De	etail			
6			on an	and the second second second					C14 00/04	Tabat
7		Agency T	otals	HSA Pro % FTE	gram	1/1/21 - 6/30/21	FY 21/22	FY 22/23	FY 23/24	Total
		Annual Full		funded by						
1		Time Salary	Total		Adjusted	D. L. J.	Dudaat	Dudaat	Budget	Budget
	DAS Salary	for FTE	FTE	(Max	FTE	Budget	Budget	Budget \$80,000	Budget \$80,000	\$280,000
_	Managing Attorney	\$80,000	1.00	100.00%	1.00	\$40,000	\$80,000	\$80,000 \$16,250	\$80,000 \$16,250	\$280,000
	Law Fellow	\$65,000	1.00	25,00%	0,25	\$8,125	\$16,250	\$10,200	φτ0,200	\$10,073
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	Totals	\$145,000	2.00	125.00%	1.25	\$48,125	\$96,250	\$96,250	\$96,250	\$336,875
20										
	Fringe Benefits Rate	34.00%								
22	Employee Fringe Benefits	\$49,300				\$16,363	\$32,725	\$32,725	\$32,725	\$114,538
23	Total DAS Salaries and Benefits	\$194,300				\$64,488	\$128,975	\$128,975	\$128,975	\$451,413
24			1		·····					
		Annual Full		% FTE						
		TimeSalary		(Max	Adjusted					
	Non DAAS Salary	for FTE	FTE	100%)	FTE			Non DAS Salary	Non DAS Salary	
	Legal Director	\$159,000	1.00			\$7,950	\$15,900	\$15,900	\$15,900	\$55,650 \$47,600
	Policy Director	\$136,000	1.00		†	\$6,800	\$13,600	\$13,600	\$13,600 \$5,044	\$47,600 \$17,654
28	Legal Secretary	\$45,856	1.00	11.00%	0.11	\$2,522	\$5,044	\$5,044	<u> </u>	<u>φ[1,004</u>
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36	Totals	\$340,856	3.00	31.00%	0.31	\$17,272	\$34,544	\$34,544	\$34,544	\$120,904
37			,,	,						
	Fringe Benefits Rate	34.00%	,							
	Employee Fringe Benefits	\$115,891				\$5,872	\$11,745	\$11,745	\$11,745	\$41,107
	Total Non DAAS Salaries and	· · · ·			1					-
40	Benefits	\$456,747				\$23,144	\$46,289	\$46,289	\$46,289	\$162,011
41										
	Total DAAS and Non DAAS									
42	Salaries and Benefits	\$651,047	<u> </u>			\$87,632	\$175,264	\$175,264	\$175,264	\$613,424
43										
	HSA #2									10/22/2020

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-	Program: Lega	er adults				-								Append	Appendix B, Page 3
2	(Same as Line 11 on HSA #1)												Document	Date: Dec	Document Date: December 2020
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~					I	1/1/21	1/1/21 - 6/30/21		FY 21/22		FY 22/23		FY 23/24		I OTAI
თ															
9	10 DAS Operating Expenses														
:	Expenditure Category														
12	2 Rental of Property														
13	13 Utilities (Elec, Water, Gas, Phone, Garbage)	ne, Garbac	je)												
4	14 Office Supplies, Postage						\$1,265	 س	\$2,531		\$2,531		\$2,531		\$8,858
15	5 Building Maintenance Supplies and Repair	and Repair	b												
16	5 Printing and Reproduction						\$422	 م	\$1,412	2	\$1,412		\$1,412		\$4,658
17							\$562		\$926	و	\$926		\$926		\$3,340
1 8	3 Staff Training						\$60	 	\$1,280	0	\$1,280		\$1,280		\$3,900
1 0	3 Staff Travel-(Local & Out of Town)	(uv					\$1,000	 	\$1,550	0	\$1,550		\$1,550		\$5,650
20															
21															-
22	2 Consultant							-							
33	3 Consultant A														
24	4														
25															
26	26 OTHER														
27	7 Filling Fees							1							
28	28 State bar Membership Fees						\$1,080	 	\$1,080		\$1,080		\$1,080		\$4,320
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~	20 Total DAS Anomating Exponence	ý					085 12	σ	\$8 779	ğ	977 88		\$8.779		\$30.726
3 8		8					22 ⁵								
5 8	32 HSA #3														10/22/2020