



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

Office of Early Care  
and Education

P.O. Box 7988  
San Francisco, CA  
94120-7988  
[www.SFHSA.org](http://www.SFHSA.org)



**London Breed**  
Mayor

**Trent Rhorer**  
Executive Director

**MEMORANDUM**

**TO:** DISABILITY AND AGING SERVICES COMMISSION

**THROUGH:** KELLY DEARMAN, EXECUTIVE DIRECTOR

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

**DATE:** JULY 7, 2021

**SUBJECT:** NEW GRANTS: **MULTIPLE GRANTEES** FOR THE  
PROVISION OF AN ADULT DAY PROGRAM FOR  
OLDER ADULTS AND ADULTS WITH DISABILITIES

DS  
*EE*

**GRANT TERM:** 7/1/2021 – 6/30/2024

**GRANT AMOUNTS:** See Table Below

<b>FUNDING SOURCE:</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
<b>FUNDING:</b>	\$1,740,000			\$174,000	\$1,914,000
<b>PERCENTAGE:</b>	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to enter into new grant agreements with multiple providers for the time period beginning July 1, 2021 and ending on June 30, 2024 in the combined amount of \$1,740,000, plus a 10% contingency for a total not to exceed amount of \$1,914,000. The purpose of the grants is to provide Adult Day Program (ADP) services to older adults and adults with disabilities and respite to caregivers and families. The funding amounts are detailed in the table below.

<b>Grantee</b>	<b>FY 21/22</b>	<b>FY 22/23</b>	<b>FY 23/24</b>	<b>Grant Total</b>	<b>10% Contingency</b>	<b>Total Not to Exceed</b>
Catholic Charities of San Francisco	\$180,000	\$180,000	\$180,000	\$540,000	\$54,000	\$594,000
Institute on Aging	\$111,000	\$111,000	\$111,000	\$333,000	\$33,300	\$366,300
Kimochi	\$65,000	\$65,000	\$65,000	\$195,000	\$19,500	\$214,500
On Lok Day Services	\$105,000	\$105,000	\$105,000	\$315,000	\$31,500	\$346,500
Self-Help for the Elderly	\$119,000	\$119,000	\$119,000	\$357,000	\$35,700	\$392,700
<b>Total</b>	<b>\$580,000</b>	<b>\$580,000</b>	<b>\$580,000</b>	<b>\$1,740,000</b>	<b>\$174,000</b>	<b>\$1,914,000</b>

### **Background**

First funded by the City in 1990, Adult Day Programs (ADPs) are called a “social day model” to distinguish them from Adult Day Health Care (ADHC) programs which offer nursing care and other medical supports. ADPs are community-based programs that provide non-medical care to persons 18 years of age or older in need of personal care services, supervision, or assistance necessary for sustaining Activities of Daily Living (ADL).

ADPs play an important role in the City’s effort to support aging in place by preserving community living and allowing opportunities for individuals to be active in a safe environment and to socialize with others in the program. In addition, ADPs support the wellbeing of caregivers through education, resources, and connection.

### **Services to be Provided**

Grantees will operate an Adult Day Program that is currently licensed by the California Department of Social Services, Community Care Licensing, to provide non-medical day program services by trained and competent staff to meet the needs of functionally impaired adults. Services will include an individual plan of care in a structured comprehensive program that will provide a variety of social, emotional, and related support services in a protective setting on less than 24-hour basis. Services offered by ADPs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and

supportive counseling. In circumstances when in-person engagement is not feasible due to public health orders, Grantees will deliver services through virtual, telephonic, and other safe methods of engagement.

Individuals eligible for ADP services must be San Francisco residents, 18 years and older, and living with a disability, or have functional needs or difficulties sustaining ADL and will benefit from assistance or supervision in maintaining independence.

**Selection**

Grantees were selected through RFP #872 issued in April 2, 2021.

**Funding**

Funding for these grants is provided by County General Funds.

**ATTACHMENTS**

**Catholic Charities of San Francisco**

Appendix A-Services to be Provided

Appendix B-Program Budget

Appendix F-Site Chart

**Institute on Aging**

Appendix A-Services to be Provided

Appendix B-Program Budget

Appendix F-Site Chart

**Kimochi**

Appendix A-Services to be Provided

Appendix B-Program Budget

Appendix F-Site Chart

**On Lok Day Services**

Appendix A-Services to be Provided

Appendix B-Program Budget

Appendix F-Site Chart

**Self-Help for the Elderly**

Appendix A-Services to be Provided

Appendix B-Program Budget

Appendix F-Site Chart

## APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Catholic Charities of San Francisco

July 1, 2021 – June 30, 2024

Adult Day Program (ADP)

Adult Day Services Collaboration

**I. Purpose**

The purpose of this grant is to assist licensed Adult Day Programs (ADPs) with the operating costs of providing services to eligible older adults and adults with disabilities, to help encourage independence and keep them in the community by providing opportunities for social, physical, and emotional engagement. ADPs also help to provide needed respite for caregivers.

**II. Definitions**

ADP	Adult Day Program; A community-based program that provides non-medical care to persons 18 years of age or older in need of personal care services, supervision, assistance with sustaining the activities of daily living, or the protection of the individual on less than 24-hour basis. The State Department of Social Services (DSS) licenses the ADP center as a community care facility.
ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
CA GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.
CARBON	Contracts Administration, Reporting, and Billing Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions 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	Catholic Charities of San Francisco
HSA	Human Services Agency of the City and County of San Francisco
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, gender queer, and gender non-binary.
Low-income	Having income at or below 300% of the federal poverty line defined by the Federal Bureau of Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, and not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan, Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management
Older Adult	Person who is 60 years or older, used interchangeably with 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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).

### **III. Target Population**

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

- A. Low-income
- B. Non- or limited English speaking
- C. Minority
- D. Frail
- E. Member of LGBTQ+ community

### **IV. Eligibility for ADP Services**

A resident of San Francisco who is 18 years and older, and living with a disability, or has functional needs or difficulties sustaining Activities of Daily Living (ADLs), and who will benefit from assistance or supervision in maintaining independence.

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

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

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

Grantee will operate an Adult Day Program that is currently licensed by the California Department of Social Services, Community Care Licensing, to provide non-medical day program services by trained and competent staff to meet the needs of functionally impaired adults. Services will include an individual plan of care in a structured comprehensive program that will provide a variety of social, emotional, and related support services in a protective setting on less than 24-hour basis. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

### **VII. Units of Service and Definitions**

During the term of the grant, the Grantee will provide the following units of service:

**Unduplicated Consumers** – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

**Adult Day Program Hours** – Provision of ADP services that include personal care for participants in a supervised, protective, congregate setting during some portion of a 24-hour day. Services typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. The total units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

**Adult Day Services Collaboration** – The Adult Day Services Collaboration is a body of Adult Day Service providers that work together to coordinate services, advocate for service expansion, and address other needs related to service provision. Unit of service is defined as provision of technical assistance to the Adult Day Services Collaboration meetings.

UNIT: One (1) meeting

### **VIII. Service Objectives**

On an annual basis:

- A. Grantee will provide Adult Day Program services to **45** unduplicated consumers.
- B. Grantee will provide **18,500** Adult Day Program hours to consumers.

### **IX. Outcome Objectives**

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey administered by the Grantee and other data tracking systems utilized by the Grantee.

- A. Consumers who have been in the program for 6 months or more are able to live in the community instead of being institutionalized. Target: 85%
- B. Consumers are socially engaged as evidenced by their participation in social opportunities offered by the program. Target: 85%
- C. After participation in the program for 6 months or more, consumers rate the quality of services received at the Adult Day Program as good or excellent. Target: 85%

### **X. Reporting and Other Requirements**

- A. Grantee must enter consumer data and units of service into CA GetCare – Community Services module by the 5<sup>th</sup> working day of the month for the preceding month.

- B. Monthly, quarterly, and/or annual program reports must be submitted in the CARBON system as required by HSA/DAS/OCP. All reports are due by the 15<sup>th</sup> of the month for the preceding reporting period.
- C. Grantee must submit response rates and aggregate data from annual consumer survey to HSA/DAS/OCP by July 15<sup>th</sup> each year for the preceding grant year.
- D. Grantee must submit a Fiscal Closeout Report in the CARBON system by July 31<sup>st</sup> each year for the preceding grant year.
- E. Grantee must submit ad hoc reports as requested by HSA/DAS/OCP.
- F. Grantee must submit a bi-annual summary report of SOGI data collected as required by state and local law. The report must be submitted in the CARBON system by January 10<sup>th</sup> (for data collected between July 1<sup>st</sup> and December 31<sup>st</sup>) and July 10<sup>th</sup> (for data collected between January 1<sup>st</sup> and June 30<sup>th</sup>) for each grant year.
- G. Grantee must be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- H. Apart from reports requested to be sent via email to the Program Analyst/Manager and/or Contract Manager, all other reports and communications should be sent to the following:

Tahir Shaikh  
Contracts Manager  
[Tahir.Shaikh@sfgov.org](mailto:Tahir.Shaikh@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

Fanny Lapitan  
Program Manager  
[Fanny.Lapitan@sfgov.org](mailto:Fanny.Lapitan@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

## **XI. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards and requirements, including client eligibility, back up documentation for units of service and all reporting, progress towards service and outcome objectives, handling and documentation of participant records, and reporting on CA GetCare. Review of agency and organization standards, including organizational chart, qualifications of program staff, and evidence of staff training for Elder Abuse Reporting and Security Awareness Training. Review of program operations, including policies and procedures for all aspects of the program, written project income policies if applicable, grievance procedures, and Quality Assurance plan.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement,

fiscal policy manual, supporting documentation for selected invoices, cash receipts, and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, current board roster and selected board minutes for compliance with Sunshine Ordinance.

	A	B	C	D	F
1	Appendix B, Page 1				
2					
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>				
4	<b>BY PROGRAM</b>				
5	Name		Term		
6	<b>Catholic Charities</b>		7/1/21-6/30/24		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	Program: <b>Adult Day Program</b>				
10	Budget Reference Page No.(s)				Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	<b>Expenditures</b>				
13	Salaries & Benefits	\$121,892	\$121,892	\$121,892	\$365,676
14	Operating Expenses	\$34,631	\$34,631	\$34,631	\$103,893
15	<b>Subtotal</b>	<b>\$156,523</b>	<b>\$156,523</b>	<b>\$156,523</b>	<b>\$469,569</b>
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$23,477	\$23,477	\$23,477.43	\$70,431
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0
19	<b>Total Expenditures</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$540,000</b>
20	<b>HSA Revenues</b>				
21	General Fund	\$180,000	\$180,000	\$180,000	\$540,000
22					
23					
24					
25					
26					
27					
28					
29	<b>TOTAL HSA REVENUES</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$180,000</b>	<b>\$540,000</b>
30	<b>Other Revenues</b>				
31					
32	Foundations, Grants, Fees, & Donations	\$139,399	\$139,399	\$139,399	\$418,197
33					
34					
35					
36	<b>Total Revenues</b>	<b>\$319,399</b>	<b>\$319,399</b>	<b>\$319,399</b>	<b>\$958,197</b>
37	Full Time Equivalent (FTE)				
39	Prepared by: Patty Clement/Delilah Perez Telephone No.: 415-452-3504 / 415-972-1208				
40	HSA-CO Review Signature: _____				
41	<b>HSA #1</b> <span style="float: right;"><b>6/20/2018</b></span>				



	A	B	C	D	E	F	G	H	I	J	L	M	N
1	Appendix B, Page 3												
2													
3	<b>Catholic Charities</b>												
4	<b>Program: Adult Day Program</b>												
5													
6													
7	<b>Operating Expense Detail</b>												
8													
9													
10													
11													
12	<u>Expenditure Category</u>		TERM	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>		<u>7/1/23-6/30/24</u>						TOTAL <u>7/1/21-6/30/24</u>
13	Rental of Property			\$27,068	\$27,068		\$27,068						\$81,204
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$6,234	\$6,234		\$6,234						\$18,702
15	Office Supplies, Postage												
16	Building Maintenance Supplies and Repair												
17	Printing and Reproduction												
18	Insurance			\$1,329	\$1,329		\$1,329						\$3,987
19	Staff Training												
20	Staff Travel-(Local & Out of Town)												
21	Rental of Equipment												
22													
23	<b>CONSULTANTS</b>												
24													
25													
26													
27	<b>OTHER</b>												
28													
29													
30													
31	<b>TOTAL OPERATING EXPENSE</b>			<u>\$34,631</u>	<u>\$34,631</u>		<u>\$34,631</u>						\$103,893
32													
33	<b>HSA #3</b>												<b>6/20/2018</b>

	A	B	C	D	E	F	G	
1							Appendix B, Page 4	
2								
3		<b>Catholic Charities</b>						
4		<b>Program: Adult Day Program</b>						
5								
6								
7								
8								
9								
10		<b>SUBCONTRACTORS</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/0/00	7/1/21-6/30/24	
11		Subcontractor 1						
12		Subcontractor 2						
13								
14								
15								
16		<b>TOTAL SUBCONTRACTOR COST</b>	\$0	\$0	\$0	\$0	\$0	
17								
18								
19		<b>EQUIPMENT</b>	<b>TERM</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/0/00	7/1/21-6/30/24
20	Units	ITEM/DESCRIPTION						
21		Equipment A						
22								
23								
24								
25		<b>TOTAL EQUIPMENT COST</b>	\$0	\$0	\$0	\$0	\$0	
26								
27		<b>REMODELING</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	1/0/00	7/1/21-6/30/24	
28		Description:						
29		Remodel A						
30								
31								
32		<b>TOTAL REMODELING COST</b>	\$0	\$0	\$0	\$0	\$0	
33								
34		<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	\$0	\$0		\$0	\$0	
35								
36		<b>HSA #4</b>					6/20/2018	

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: Catholic Charities

FISCAL YEAR: 2021-2022

CONTRACT: Adult Day Program

DIRECTOR: Patty Clement

PHONE NO.: 415-452-3504

<b>SITES:</b>	Catholic Charities Adult Day Services – San Francisco				
<b>Name of Site</b>					
Address and Zip	50 Broad Street San Francisco, CA 94112				
Phone Number	415-452-3500				
Fax Number	415-452-3505				
Neighborhood	OMI / City of San Francisco				
Muni Line #s	Muni M & Route 54				
Person in Charge Site Manager	Patty Clement Carmen Santoni				
Programs Offered at Site	ADC Scheduled activities				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8:00 AM – 5:00 PM				
Hours of <u>scheduled</u> programming	9:30 AM – 3:00 PM				
Total number of service days in FY	246				
Days closed	All Holidays listed to the right	All Holidays listed to the right.	New Years Day, Martin Luther King Day, President's Day, Good Friday, Memorial Day, Juneteenth,	Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, Christmas Eve, Christmas Day, 1-2 Training Days	
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Institute on Aging  
July 1, 2021 – June 30, 2024  
Adult Day Program (ADP)

**I. Purpose**

The purpose of this grant is to assist licensed Adult Day Programs (ADPs) with the operating costs of providing services to eligible older adults and adults with disabilities, to help encourage independence and keep them in the community by providing opportunities for social, physical, and emotional engagement. ADPs also help to provide needed respite for caregivers.

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	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	Institute on Aging – Irene Swindell’s
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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, gender queer, and gender non-binary.
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OCP	Office of Community Partnerships
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### **III. Target Population**

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- B. Non- or limited English speaking
- C. Minority
- D. Frail
- E. Member of LGBTQ+ community

### **IV. Eligibility for ADP Services**

A resident of San Francisco who is 18 years and older, and living with a disability, or has functional needs or difficulties sustaining Activities of Daily Living (ADLs), and who will benefit from assistance or supervision in maintaining independence.

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

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

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

Grantee will operate an Adult Day Program that is currently licensed by the California Department of Social Services, Community Care Licensing, to provide non-medical day program services by trained and competent staff to meet the needs of functionally impaired adults. Services will include an individual plan of care in a structured comprehensive program that will provide a variety of social, emotional, and related support services in a protective setting on less than 24-hour basis. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

### **VII. Units of Service and Definitions**

During the term of the grant, the Grantee will provide the following units of service:

**Unduplicated Consumers** – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

**Adult Day Program Hours** – Provision of ADP services that include personal care for participants in a supervised, protective, congregate setting during some portion of a 24-hour day. Services typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. The total units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

### **VIII. Service Objectives**

On an annual basis:

- A. Grantee will provide Adult Day Program services to **33** unduplicated consumers.
- B. Grantee will provide **12,350** Adult Day Program hours to consumers.

### **IX. Outcome Objectives**

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey administered by the Grantee and other data tracking systems utilized by the Grantee.

- A. Consumers who have been in the program for 6 months or more are able to live in the community instead of being institutionalized. Target: 85%
- B. Consumers are socially engaged as evidenced by their participation in social opportunities offered by the program. Target: 85%
- C. After participation in the program for 6 months or more, consumers rate the quality of services received at the Adult Day Program as good or excellent. Target: 85%

### **X. Reporting and Other Requirements**

- A. Grantee must enter consumer data and units of service into CA GetCare – Community Services module by the 5<sup>th</sup> working day of the month for the preceding month.
- B. Monthly, quarterly, and/or annual program reports must be submitted in the CARBON system as required by HSA/DAS/OCP. All reports are due by the 15<sup>th</sup> of the month for the preceding reporting period.
- C. Grantee must submit response rates and aggregate data from annual consumer survey to HSA/DAS/OCP by July 15<sup>th</sup> each year for the preceding grant year.
- D. Grantee must submit a Fiscal Closeout Report in the CARBON system by July 31<sup>st</sup> each year for the preceding grant year.

- E. Grantee must submit ad hoc reports as requested by HSA/DAS/OCP.
- F. Grantee must submit a bi-annual summary report of SOGI data collected as required by state and local law. The report must be submitted in the CARBON system by January 10<sup>th</sup> (for data collected between July 1<sup>st</sup> and December 31<sup>st</sup>) and July 10<sup>th</sup> (for data collected between January 1<sup>st</sup> and June 30<sup>th</sup>) for each grant year.
- G. Grantee must be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- H. Apart from reports requested to be sent via email to the Program Analyst/Manager and/or Contract Manager, all other reports and communications should be sent to the following:

Tahir Shaikh  
Contracts Manager  
[Tahir.Shaikh@sfgov.org](mailto:Tahir.Shaikh@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

Fanny Lapitan  
Program Manager  
[Fanny.Lapitan@sfgov.org](mailto:Fanny.Lapitan@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

## **XI. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards and requirements, including client eligibility, back up documentation for units of service and all reporting, progress towards service and outcome objectives, handling and documentation of participant records, and reporting on CA GetCare. Review of agency and organization standards, including organizational chart, qualifications of program staff, and evidence of staff training for Elder Abuse Reporting and Security Awareness Training. Review of program operations, including policies and procedures for all aspects of the program, written project income policies if applicable, grievance procedures, and Quality Assurance plan.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts, and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, current board roster and selected board minutes for compliance with Sunshine Ordinance.

	A	B	C	D	E
1	Appendix B, Page 1				
2	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>				
3					
4					
5					
6	<b>Institute on Aging</b>	7/1/21-6/30/24			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	<b>Program: Adult Day Program</b>				
10	Budget Reference Page No.(s)				Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	<b>Expenditures</b>				
13	Salaries & Benefits	\$89,828	\$89,828	\$89,828	\$269,484
14	Operating Expenses	\$6,694	\$6,694	\$6,694	\$20,082
15	<b>Subtotal</b>	<b>\$96,522</b>	<b>\$96,522</b>	<b>\$96,522</b>	<b>\$289,566</b>
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$14,478	\$14,478	\$14,478	\$43,434
18	Subcontractor/Capital Expenditures	\$0	\$0	\$0	\$0
19	<b>Total Expenditures</b>	<b>\$111,000</b>	<b>\$111,000</b>	<b>\$111,000</b>	<b>\$333,000</b>
20	<b>HSA Revenues</b>				
21	General Fund	\$111,000	\$111,000	\$111,000	\$333,000
22					
23					
24					
25					
26					
27					
28					
29	<b>TOTAL HSA REVENUES</b>	<b>\$111,000</b>	<b>\$111,000</b>	<b>\$111,000</b>	<b>\$333,000</b>
30	<b>Other Revenues</b>				
31					
32					
33					
34					
35					
36	Total Revenues	\$111,000	\$111,000	\$111,000	\$333,000
37	Full Time Equivalent (FTE)				
39	Prepared by:				
40	HSA-CO Review Signature: _____				
41	<b>HSA #1</b>				<b>6/20/2018</b>

	A	B	C	D	E	F	G	H	I
1									
2									
3	<b>Institute on Aging</b>								
4	<b>Program: Adult Day Program</b>								
5									
6									
7	<b>Salaries &amp; Benefits Detail</b>								
8									
9									
10									
11		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	Total
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Program Director	\$87,724	1.00	50%	0.50	\$43,862	\$43,862	\$43,862	\$131,586
14	Client Services Manager	\$70,000	1.00	40%	0.40	\$28,000	\$28,000	\$28,000	\$84,000
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30	TOTALS	\$157,724	2.00	90%	0.90	\$71,862	\$71,862	\$71,862	\$215,586
31									
32	FRINGE BENEFIT RATE	25%							
33	EMPLOYEE FRINGE BENEFITS	\$39,431				\$17,966	\$17,966	\$17,966	\$53,898
34									
35									
36	TOTAL SALARIES & BENEFITS	\$197,155				\$89,828	\$89,828	\$89,828	\$269,484
37	<b>HSA #2</b>								<b>6/20/2018</b>

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	<b>Institute on Aging</b>												
4	<b>Program: Adult Day Program</b>												
5													
6													
7	<b>Operating Expense Detail</b>												
8													
9													
10													
11													
12	<u>Expenditure Category</u>		TERM	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>							TOTAL Total
13	Food Supplies			\$5,459	\$5,459	\$5,459							\$16,377
14	Client Transportation			\$885	\$885	\$885							\$2,655
15	Insurance			\$350	\$350	\$350							\$1,050
16													
17													
18													
19													
20													
21													
22													
23	<b>CONSULTANTS</b>												
24													
25													
26													
27	<b>OTHER</b>												
28													
29													
30													
31	<b>TOTAL OPERATING EXPENSE</b>			<b>\$6,694</b>	<b>\$6,694</b>	<b>\$6,694</b>							\$20,082
32													
33	<b>HSA #3</b>												<b>6/20/2018</b>

	A	B	C	D	E	F	
1						Appendix B, Page 4	
2							
3		<b>Institute on Aging</b>					
4		<b>Program: Adult Day Program</b>					
5							
6							
7							
8		<b>Subcontractor/Capital Expenditures</b>					
9							
10		<b>SUBCONTRACTORS</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	Total	
11		Subcontractor 1					
12		Subcontractor 2					
13							
14							
15							
16		<b>TOTAL SUBCONTRACTOR COST</b>	\$0	\$0	\$0	\$0	
17							
18							
19		<b>EQUIPMENT</b>	<b>TERM</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	Total
20	Units	ITEM/DESCRIPTION					
21		Equipment A					
22							
23							
24							
25		<b>TOTAL EQUIPMENT COST</b>	\$0	\$0	\$0	\$0	
26							
27		<b>R E M O D E L I N G</b>	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	Total	
28		Description:					
29		Remodel A					
30							
31							
32		<b>TOTAL REMODELING COST</b>	\$0	\$0	\$0	\$0	
33							
34		<b>TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE</b>	<b>\$0</b>		<b>\$0</b>	<b>\$0</b>	
35							
36		<b>HSA #4</b>				<b>6/20/2018</b>	

**APPENDIX F - SITE CHART**

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: (Institute on Aging

FISCAL YEAR: **2021-2022**

CONTRACT: Adult Day Program

DIRECTOR: Alison Moritz

PHONE NO.: 415-728-9260

<b>SITES:</b>	Irene Swindell's Adult Day Program				
<b>Name of Site</b>					
Address and Zip	386 Moraga Avenue San Francisco, CA 94129				
Phone Number	415-728-9260				
Fax Number	Presidio				
Neighborhood	On—site Director: Alison Moritz				
Muni Line #s					
Person in Charge	Administrator: Aaron McPherson				
Site Manager					
Programs Offered at Site	ADP & ADCRC				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat (once monthly) <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	830 AM- 500 PM				
Hours of <u>scheduled</u> programming	900 AM – 3 PM				
Total number of service days in FY	273				
Days closed	New Year's Day Martin Luther King Day President's Day Memorial Day Independence Day Labor Day Thanksgiving Day Christmas Day				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Kimochi, Inc.

July 1, 2021 – June 30, 2024

Adult Day Program (ADP)

**I. Purpose**

The purpose of this grant is to assist licensed Adult Day Programs (ADPs) with the operating costs of providing services to eligible older adults and adults with disabilities, to help encourage independence and keep them in the community by providing opportunities for social, physical, and emotional engagement. ADPs also help to provide needed respite for caregivers.

**II. Definitions**

ADP	Adult Day Program; A community-based program that provides non-medical care to persons 18 years of age or older in need of personal care services, supervision, assistance with sustaining the activities of daily living, or the protection of the individual on less than 24-hour basis. The State Department of Social Services (DSS) licenses the ADP center as a community care facility.
ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
CA GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.
CARBON	Contracts Administration, Reporting, and Billing Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions 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	Kimochi, Inc.
HSA	Human Services Agency of the City and County of San Francisco
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, gender queer, and gender non-binary.
Low-income	Having income at or below 300% of the federal poverty line defined by the Federal Bureau of Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, and not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan, Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management
Older Adult	Person who is 60 years or older, used interchangeably with 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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).

### **III. Target Population**

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

- A. Low-income
- B. Non- or limited English speaking
- C. Minority
- D. Frail
- E. Member of LGBTQ+ community

### **IV. Eligibility for ADP Services**

A resident of San Francisco who is 18 years and older, and living with a disability, or has functional needs or difficulties sustaining Activities of Daily Living (ADLs), and who will benefit from assistance or supervision in maintaining independence.

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

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

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

Grantee will operate an Adult Day Program that is currently licensed by the California Department of Social Services, Community Care Licensing, to provide non-medical day program services by trained and competent staff to meet the needs of functionally impaired adults. Services will include an individual plan of care in a structured comprehensive program that will provide a variety of social, emotional, and related support services in a protective setting on less than 24-hour basis. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

### **VII. Units of Service and Definitions**

During the term of the grant, the Grantee will provide the following units of service:

**Unduplicated Consumers** – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

**Adult Day Program Hours** – Provision of ADP services that include personal care for participants in a supervised, protective, congregate setting during some portion of a 24-hour day. Services typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. The total units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

### **VIII. Service Objectives**

On an annual basis:

- A. Grantee will provide Adult Day Program services to **45** unduplicated consumers.
- B. Grantee will provide **20,000** Adult Day Program hours to consumers.

### **IX. Outcome Objectives**

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey administered by the Grantee and other data tracking systems utilized by the Grantee.

- A. Consumers who have been in the program for 6 months or more are able to live in the community instead of being institutionalized. Target: 85%
- B. Consumers are socially engaged as evidenced by their participation in social opportunities offered by the program. Target: 85%
- C. After participation in the program for 6 months or more, consumers rate the quality of services received at the Adult Day Program as good or excellent. Target: 85%

### **X. Reporting and Other Requirements**

- A. Grantee must enter consumer data and units of service into CA GetCare – Community Services module by the 5<sup>th</sup> working day of the month for the preceding month.
- B. Monthly, quarterly, and/or annual program reports must be submitted in the CARBON system as required by HSA/DAS/OCP. All reports are due by the 15<sup>th</sup> of the month for the preceding reporting period.
- C. Grantee must submit response rates and aggregate data from annual consumer survey to HSA/DAS/OCP by July 15<sup>th</sup> each year for the preceding grant year.
- D. Grantee must submit a Fiscal Closeout Report in the CARBON system by July 31<sup>st</sup> each year for the preceding grant year.

- E. Grantee must submit ad hoc reports as requested by HSA/DAS/OCP.
- F. Grantee must submit a bi-annual summary report of SOGI data collected as required by state and local law. The report must be submitted in the CARBON system by January 10<sup>th</sup> (for data collected between July 1<sup>st</sup> and December 31<sup>st</sup>) and July 10<sup>th</sup> (for data collected between January 1<sup>st</sup> and June 30<sup>th</sup>) for each grant year.
- G. Grantee must be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- H. Apart from reports requested to be sent via email to the Program Analyst/Manager and/or Contract Manager, all other reports and communications should be sent to the following:

Tahir Shaikh  
Contracts Manager  
[Tahir.Shaikh@sfgov.org](mailto:Tahir.Shaikh@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

Fanny Lapitan  
Program Manager  
[Fanny.Lapitan@sfgov.org](mailto:Fanny.Lapitan@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

## **XI. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards and requirements, including client eligibility, back up documentation for units of service and all reporting, progress towards service and outcome objectives, handling and documentation of participant records, and reporting on CA GetCare. Review of agency and organization standards, including organizational chart, qualifications of program staff, and evidence of staff training for Elder Abuse Reporting and Security Awareness Training. Review of program operations, including policies and procedures for all aspects of the program, written project income policies if applicable, grievance procedures, and Quality Assurance plan.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts, and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, current board roster and selected board minutes for compliance with Sunshine Ordinance.

	A	B	C	D	E
1	Appendix B, Page 1				
2					
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>				
4					
5	Name		Term		
6	Kimochi, Inc.		7/1/21-6/30/24		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	<b>Program: ADP</b>				
10	Budget Reference Page No.(s)				Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	<b>Expenditures</b>				
13	Salaries & Benefits	\$57,221	\$57,221	\$57,221	\$171,663
14	Operating Expenses	\$500	\$500	\$500	\$1,500
15	<b>Subtotal</b>	<b>\$57,721</b>	<b>\$57,721</b>	<b>\$57,721</b>	<b>\$173,163</b>
16	Indirect Percentage (%)	13%	13%	13%	
17	Indirect Cost (Line 16 X Line 15)	\$7,279	\$7,279	\$7,279	\$21,837
18	Subcontractor/Capital Expenditures				
19	<b>Total Expenditures</b>	<b>\$65,000</b>	<b>\$65,000</b>	<b>\$65,000</b>	<b>\$195,000</b>
20	<b>HSA Revenues</b>				
21	General Fund	\$65,000	\$65,000	\$65,000	\$195,000
22					
23					
24					
25					
26					
27					
28					
29	TOTAL HSA REVENUES	\$65,000	\$65,000	\$65,000	\$195,000
30	<b>Other Revenues</b>				
31					
32	\$0				
33					
34					
35					
36	Total Revenues	\$65,000	\$65,000	\$65,000	\$195,000
37	Full Time Equivalent (FTE)				
39	Prepared by:				
40	HSA-CO Review Signature: _____				
41	<b>HSA #1</b>				<b>6/8/2021</b>

	A	B	C	D	E	F	G	H	I
1	Appendix B, Page 2								
2									
3	<b>Kimochi, Inc.</b>								
4	<b>Program: ADP</b>								
5									
6									
7	<b>Salaries &amp; Benefits Detail</b>								
8									
9									
10									
11		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	Total
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	ADP Coordinator	\$43,680	1.00	100%	1.00	\$43,680	\$43,680	\$43,680	\$131,040
14									
15									
16	TOTALS	\$43,680	1.00	100%	1.00	\$43,680	\$43,680	\$43,680	\$131,040
17									
18	FRINGE BENEFIT RATE	31%							
19	EMPLOYEE FRINGE BENEFITS	\$13,541				\$13,541	\$13,541	\$13,541	\$40,623
20									
21									
22	TOTAL SALARIES & BENEFITS	\$57,221				\$57,221	\$57,221	\$57,221	\$171,663
23	<b>HSA #2</b>								<b>6/8/2021</b>

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	<b>Kimochi, Inc.</b>												
4	<b>Program: ADP</b>												
5													
6													
7	<b>Operating Expense Detail</b>												
8													
9													
10													
11													
12	<u>Expenditure Category</u>		TERM	<u>7/1/21-6/30/22</u>	<u>7/1/22-6/30/23</u>	<u>7/1/23-6/30/24</u>							TOTAL Total
13	Rental of Property												
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$500	\$500	\$500							\$1,500
15	Office Supplies, Postage												
16	Computer/IT/Website												
17	Printing and Reproduction												
18	Insurance												
19	License												
20	Staff Training												
21	Rental of Equipment												
22													
23	<b>CONSULTANTS</b>												
24													
25													
26													
27	<b>OTHER</b>												
28													
29													
30													
31	<b>TOTAL OPERATING EXPENSE</b>			<u>\$500</u>	<u>\$500</u>	<u>\$500</u>							\$1,500
32													
33	<b>HSA #3</b>												<b>6/8/2021</b>

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: Kimochi, Inc.

FISCAL YEAR: 2021-2022

CONTRACT: Adult Day Program

DIRECTOR: Shawne O'Connell, Director of Programs

PHONE NO.: (415) 931-2294

<b>SITES:</b>	Kimochi Home				
<b>Name of Site</b>	Kimochi Home				
Address and Zip	1531 Sutter Street San Francisco, 94115				
Phone Number	(415) 922-9972				
Fax Number	(415) 922-6821				
Neighborhood	Western Addition				
Muni Line #s	2,3,22,38				
Person in Charge	Sandy Ishii				
Site Manager	Sandy Ishii				
Programs Offered at Site	Adult Day Program Congregate Lunch				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thurs <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9:00 a.m. – 5:00 p.m.				
Hours of <u>scheduled</u> programming	10:00 a.m. - 2:30 p.m.				
Total number of service days in FY	249				
Days closed	Sat., Sun., Agency Holidays: New Year Day, MLK Bday, President's Day, Memorial Day, Labor Day, 4th of July, Indigenous People's Day, Veteran's Day, Thanksgiving Day, Day after Thanksgiving, Christmas Day				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

On Lok Day Services  
July 1, 2021 – June 30, 2024  
Adult Day Program (ADP)

### I. Purpose

The purpose of this grant is to assist licensed Adult Day Programs (ADPs) with the operating costs of providing services to eligible older adults and adults with disabilities, to help encourage independence and keep them in the community by providing opportunities for social, physical, and emotional engagement. ADPs also help to provide needed respite for caregivers.

### II. Definitions

ADP	Adult Day Program; A community-based program that provides non-medical care to persons 18 years of age or older in need of personal care services, supervision, assistance with sustaining the activities of daily living, or the protection of the individual on less than 24-hour basis. The State Department of Social Services (DSS) licenses the ADP center as a community care facility.
ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
CA GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.
CARBON	Contracts Administration, Reporting, and Billing Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions 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	On Lok Day Services
HSA	Human Services Agency of the City and County of San Francisco
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, gender queer, and gender non-binary.
Low-income	Having income at or below 300% of the federal poverty line defined by the Federal Bureau of Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, and not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan, Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management
Older Adult	Person who is 60 years or older, used interchangeably with 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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).

### **III. Target Population**

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

- A. Low-income
- B. Non- or limited English speaking
- C. Minority
- D. Frail
- E. Member of LGBTQ+ community

### **IV. Eligibility for ADP Services**

A resident of San Francisco who is 18 years and older, and living with a disability, or has functional needs or difficulties sustaining Activities of Daily Living (ADLs), and who will benefit from assistance or supervision in maintaining independence.

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

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

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

Grantee will operate an Adult Day Program that is currently licensed by the California Department of Social Services, Community Care Licensing, to provide non-medical day program services by trained and competent staff to meet the needs of functionally impaired adults. Services will include an individual plan of care in a structured comprehensive program that will provide a variety of social, emotional, and related support services in a protective setting on less than 24-hour basis. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

### **VII. Units of Service and Definitions**

During the term of the grant, the Grantee will provide the following units of service:

**Unduplicated Consumers** – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

**Adult Day Program Hours** – Provision of ADP services that include personal care for participants in a supervised, protective, congregate setting during some portion of a 24-hour day. Services typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. The total units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

### **VIII. Service Objectives**

For the period July 1, 2021 to June 30, 2022, the Grantee will meet the following service objectives:

- A. Grantee will provide Adult Day Program services to 30 unduplicated consumers.
- B. Grantee will provide 15,000 Adult Day Program hours to consumers.

For the period July 1, 2022 to June 30, 2023, the Grantee will meet the following service objectives:

- A. Grantee will provide Adult Day Program services to 60 unduplicated consumers.
- B. Grantee will provide 30,000 Adult Day Program hours to consumers.

For the period July 1, 2023 to June 30, 2024, the Grantee will meet the following service objectives:

- A. Grantee will provide Adult Day Program services to 90 unduplicated consumers.
- B. Grantee will provide 45,000 Adult Day Program hours to consumers.

### **IX. Outcome Objectives**

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey administered by the Grantee and other data tracking systems utilized by the Grantee.

- A. Consumers who have been in the program for 6 months or more are able to live in the community instead of being institutionalized. Target: 85%
- B. Consumers are socially engaged as evidenced by their participation in social opportunities offered by the program. Target: 85%
- C. After participation in the program for 6 months or more, consumers rate the quality of services received at the Adult Day Program as good or excellent. Target: 85%

### **X. Reporting and Other Requirements**

- A. Grantee must enter consumer data and units of service into CA GetCare – Community Services module by the 5<sup>th</sup> working day of the month for the preceding month.

- B. Monthly, quarterly, and/or annual program reports must be submitted in the CARBON system as required by HSA/DAS/OCP. All reports are due by the 15<sup>th</sup> of the month for the preceding reporting period.
- C. Grantee must submit response rates and aggregate data from annual consumer survey to HSA/DAS/OCP by July 15<sup>th</sup> each year for the preceding grant year.
- D. Grantee must submit a Fiscal Closeout Report in the CARBON system by July 31<sup>st</sup> each year for the preceding grant year.
- E. Grantee must submit ad hoc reports as requested by HSA/DAS/OCP.
- F. Grantee must submit a bi-annual summary report of SOGI data collected as required by state and local law. The report must be submitted in the CARBON system by January 10<sup>th</sup> (for data collected between July 1<sup>st</sup> and December 31<sup>st</sup>) and July 10<sup>th</sup> (for data collected between January 1<sup>st</sup> and June 30<sup>th</sup>) for each grant year.
- G. Grantee must be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- H. Apart from reports requested to be sent via email to the Program Analyst/Manager and/or Contract Manager, all other reports and communications should be sent to the following:

Tahir Shaikh  
Contracts Manager  
[Tahir.Shaikh@sfgov.org](mailto:Tahir.Shaikh@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

Fanny Lapitan  
Program Manager  
[Fanny.Lapitan@sfgov.org](mailto:Fanny.Lapitan@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

## **XI. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards and requirements, including client eligibility, back up documentation for units of service and all reporting, progress towards service and outcome objectives, handling and documentation of participant records, and reporting on CA GetCare. Review of agency and organization standards, including organizational chart, qualifications of program staff, and evidence of staff training for Elder Abuse Reporting and Security Awareness Training. Review of program operations, including policies and procedures for all aspects of the program, written project income policies if applicable, grievance procedures, and Quality Assurance plan.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost

allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts, and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, current board roster and selected board minutes for compliance with Sunshine Ordinance.

	A	B	C	D	E
1	Appendix B, Page 1				
2	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>				
3					
4					
5					
6	<b>On Lok Day Services</b>	7/1/21-6/30/24			
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	<b>Program: Adult Day Program</b>				
10	Budget Reference Page No.(s)				Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	<b>Expenditures</b>				
13	Salaries & Benefits	\$67,945	\$67,945	\$67,945	\$203,835
14	Operating Expenses	\$23,359	\$23,359	\$23,359	\$70,077
15	<b>Subtotal</b>	<b>\$91,304</b>	<b>\$91,304</b>	<b>\$91,304</b>	<b>\$273,912</b>
16	Indirect Percentage (%)	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$13,696	\$13,696	\$13,696	\$41,088
18	Subcontractor/Capital Expenditures				
19	<b>Total Expenditures</b>	<b>\$105,000</b>	<b>\$105,000</b>	<b>\$105,000</b>	<b>\$315,000</b>
20	<b>HSA Revenues</b>				
21	General Fund	\$105,000	\$105,000	\$105,000	\$315,000
22					
23					
24					
25					
26					
27					
28					
29	<b>TOTAL HSA REVENUES</b>	<b>\$105,000</b>	<b>\$105,000</b>	<b>\$105,000</b>	<b>\$315,000</b>
30	<b>Other Revenues</b>				
31	Agency Cash - Fundraising	\$615,829	\$615,829	\$615,829	\$1,847,487
32	Private Premium	\$8,449	\$8,449	\$8,449	\$25,347
33	Project Income - PACE	\$78,120	\$78,120	\$78,120	\$234,360
34					
35					
36	<b>Total Revenues</b>	<b>\$807,398</b>	<b>\$807,398</b>	<b>\$807,398</b>	<b>\$2,422,194</b>
37	Full Time Equivalent (FTE)	0.94	0.94	0.94	
39	Prepared by: Meko Ma				
40	HSA-CO Review Signature: _____				
41	<b>HSA #1</b>				<b>6/21/2021</b>



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Appendix B, Page 3												
2													
3	<b>On Lok Day Services</b>												
4	<b>Program: Adult Day Program</b>												
5													
6													
7	<b>Operating Expense Detail</b>												
8													
9													
10													
11	<b>H.S.A-DAS</b>											<b>TOTAL</b>	
12	<u>Expenditure Category</u>		TERM	<u>7/1/21-6/30/22</u>		<u>7/1/22-6/30/23</u>		<u>7/1/23-6/30/24</u>					<u>7/1/21-6/30/24</u>
13	Rental of Property												
14	Utilities(Elec, Water, Gas, Phone, Garbage)			\$1,671		\$1,671		\$1,671					\$5,012
15	Office Supplies, Postage			\$2,080		\$2,080		\$2,080					\$6,240
16	Building Maintenance Supplies and Repair												
17	Printing and Reproduction			\$800		\$800		\$800					\$2,400
18	Insurance												
19	Staff Training			\$1,600		\$1,600		\$1,600					\$4,800
20	Staff Travel-(Local & Out of Town)												
21	Rental of Equipment												
22													
23	<b>CONSULTANTS</b>												
24	Translation			\$791		\$791		\$791					\$2,373
25	Programming Contractor			\$1,184		\$1,184		\$1,184					\$3,552
26													
27	<b>OTHER</b>												
28	Program Supplies			\$1,600		\$1,600		\$1,600					\$4,800
29	Senior Outing			\$11,489		\$11,489		\$11,489					\$34,468
30	Therapeutic Outing			\$1,320		\$1,320		\$1,320					\$3,960
31	Leadership consultation			\$824		\$824		\$824					\$2,472
32													
33	<b>TOTAL OPERATING EXPENSE</b>			<b><u>\$23,359</u></b>		<b><u>\$23,359</u></b>		<b><u>\$23,359</u></b>					\$70,077
34													

APPENDIX F - SITE CHART

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: On Lok Day Services

FISCAL YEAR: 2021-2022

CONTRACT: Adult Day Program

DIRECTOR: John Blazek, ED/CDO

PHONE NO.: 773-510-2821

<b>SITES:</b> <b>Name of Site</b>	Openhouse + On Lok Community Day Services				
Address and Zip	75 Laguna St. San Francisco, CA 94102				
Phone Number	415-292-8302				
Fax Number	NA				
Neighborhood	D8				
Muni Line #s	F, Judah, Church				
Person in Charge	John Blazek/Francesca Gonzalez				
Site Manager	Gessika Krieger				
Programs Offered at Site	Care Coordination & Supervision, Meals, Therapeutic Activities				
Days Open	<input type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	9am-5pm				
Hours of <u>scheduled</u> programming	<b>10am-4pm</b>				
Total number of service days in FY	260				
Days closed	Sun/Mon, and certain holidays				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## APPENDIX A – SERVICES TO BE PROVIDED BY GRANTEE

Self-Help for the Elderly  
July 1, 2021 – June 30, 2024  
Adult Day Program (ADP)

### I. Purpose

The purpose of this grant is to assist licensed Adult Day Programs (ADPs) with the operating costs of providing services to eligible older adults and adults with disabilities, to help encourage independence and keep them in the community by providing opportunities for social, physical, and emotional engagement. ADPs also help to provide needed respite for caregivers.

### II. Definitions

ADP	Adult Day Program; A community-based program that provides non-medical care to persons 18 years of age or older in need of personal care services, supervision, assistance with sustaining the activities of daily living, or the protection of the individual on less than 24-hour basis. The State Department of Social Services (DSS) licenses the ADP center as a community care facility.
ADL	Activities of Daily Living; Essential and routine aspects of self-care including eating, bathing, getting dressed, toileting, transferring, and continence.
CA GetCare	A database system used by contracted agencies to perform consumer intake, assessment, enrollment, record service units, reports, etc.
CARBON	Contracts Administration, Reporting, and Billing Online; A database system used by contracted agencies to submit budgets, invoices, program reports, etc.
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions 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	Self-Help for the Elderly Adult Day Services
HSA	Human Services Agency of the City and County of San Francisco
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, gender queer, and gender non-binary.
Low-income	Having income at or below 300% of the federal poverty line defined by the Federal Bureau of Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by consumers to self-identify their income status, and not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: a) Black – a person having origins in any of the Black racial groups of Africa, b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race, c) Asian/Pacific Islander – a person whose origins are from India, Pakistan, Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas, d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
OCP	Office of Community Partnerships
OCM	Office of Contract Management
Older Adult	Person who is 60 years or older, used interchangeably with 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 consumers they serve (Chapter 104, Sections 104.1 through 104.9).

### **III. Target Population**

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

- A. Low-income
- B. Non- or limited English speaking
- C. Minority
- D. Frail
- E. Member of LGBTQ+ community

### **IV. Eligibility for ADP Services**

A resident of San Francisco who is 18 years and older, and living with a disability, or has functional needs or difficulties sustaining Activities of Daily Living (ADLs), and who will benefit from assistance or supervision in maintaining independence.

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

The sites and operation hours are detailed in the attached Site Chart (Appendix F) of the certified grant.

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

Grantee will operate an Adult Day Program that is currently licensed by the California Department of Social Services, Community Care Licensing, to provide non-medical day program services by trained and competent staff to meet the needs of functionally impaired adults. Services will include an individual plan of care in a structured comprehensive program that will provide a variety of social, emotional, and related support services in a protective setting on less than 24-hour basis. Services offered by adult day programs typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. In circumstances when in-person engagement is not feasible due to public health orders, grantee will deliver services through virtual, telephonic, and other safe methods of engagement.

### **VII. Units of Service and Definitions**

During the term of the grant, the Grantee will provide the following units of service:

**Unduplicated Consumers** – A unique individual enrolled and receiving ADP services within the fiscal year.

UNIT: One (1) unduplicated consumer

**Adult Day Program Hours** – Provision of ADP services that include personal care for participants in a supervised, protective, congregate setting during some portion of a 24-hour day. Services typically include socialization and recreational activities, health monitoring, meals and snacks, assistance with ADL, and supportive counseling. The total units of service to be reported is the cumulative number of hours of service received by individual consumers participating in the program.

UNIT: One (1) hour

### **VIII. Service Objectives**

On an annual basis:

- A. Grantee will provide Adult Day Program services to **30** unduplicated consumers.
- B. Grantee will provide **15,000** Adult Day Program hours to consumers.

### **IX. Outcome Objectives**

On an annual basis, Grantee will achieve the following outcome objectives. Data for these outcome objectives will be collected through an annual consumer survey administered by the Grantee and other data tracking systems utilized by the Grantee.

- A. Consumers who have been in the program for 6 months or more are able to live in the community instead of being institutionalized. Target: 85%
- B. Consumers are socially engaged as evidenced by their participation in social opportunities offered by the program. Target: 85%
- C. After participation in the program for 6 months or more, consumers rate the quality of services received at the Adult Day Program as good or excellent. Target: 85%

### **X. Reporting and Other Requirements**

- A. Grantee must enter consumer data and units of service into CA GetCare – Community Services module by the 5<sup>th</sup> working day of the month for the preceding month.
- B. Monthly, quarterly, and/or annual program reports must be submitted in the CARBON system as required by HSA/DAS/OCP. All reports are due by the 15<sup>th</sup> of the month for the preceding reporting period.
- C. Grantee must submit response rates and aggregate data from annual consumer survey to HSA/DAS/OCP by July 15<sup>th</sup> each year for the preceding grant year.
- D. Grantee must submit a Fiscal Closeout Report in the CARBON system by July 31<sup>st</sup> each year for the preceding grant year.

- E. Grantee must submit ad hoc reports as requested by HSA/DAS/OCP.
- F. Grantee must submit a bi-annual summary report of SOGI data collected as required by state and local law. The report must be submitted in the CARBON system by January 10<sup>th</sup> (for data collected between July 1<sup>st</sup> and December 31<sup>st</sup>) and July 10<sup>th</sup> (for data collected between January 1<sup>st</sup> and June 30<sup>th</sup>) for each grant year.
- G. Grantee must be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- H. Apart from reports requested to be sent via email to the Program Analyst/Manager and/or Contract Manager, all other reports and communications should be sent to the following:

Tahir Shaikh  
Contracts Manager  
[Tahir.Shaikh@sfgov.org](mailto:Tahir.Shaikh@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

Fanny Lapitan  
Program Manager  
[Fanny.Lapitan@sfgov.org](mailto:Fanny.Lapitan@sfgov.org)  
P.O. Box 7988  
San Francisco, CA 94120

## **XI. Monitoring Activities**

- A. Program Monitoring: Program monitoring will include review of compliance to specific program standards and requirements, including client eligibility, back up documentation for units of service and all reporting, progress towards service and outcome objectives, handling and documentation of participant records, and reporting on CA GetCare. Review of agency and organization standards, including organizational chart, qualifications of program staff, and evidence of staff training for Elder Abuse Reporting and Security Awareness Training. Review of program operations, including policies and procedures for all aspects of the program, written project income policies if applicable, grievance procedures, and Quality Assurance plan.
- B. Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts, and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, compliance with the Americans with Disabilities Act, subcontracts, MOUs, current board roster and selected board minutes for compliance with Sunshine Ordinance.

	A	B	C	D	F
1	Appendix B, Page 1				
2					
3	<b>HUMAN SERVICES AGENCY BUDGET SUMMARY</b>				
4	<b>BY PROGRAM</b>				
5	Name		Term		
6	<b>SELF-HELP FOR THE ELDERLY</b>		7/1/21-6/30/24		
7	(Check One) New <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Modification <input type="checkbox"/>				
8	If modification, Effective Date of Mod.		No. of Mod.		
9	<b>Program: ADULT DAY PROGRAM</b>				
10	Budget Reference Page No.(s)				Total
11	Program Term	7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	<b>Expenditures</b>				
13	Salaries & Benefits	\$103,478	\$103,478	\$103,478	\$310,434
14	Operating Expenses	\$0	\$0	\$0	\$0
15	<b>Subtotal</b>	<b>\$103,478</b>	<b>\$103,478</b>	<b>\$103,478</b>	<b>\$310,434</b>
16	Indirect Percentage (%)	15%	15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$15,522	\$15,522	\$15,522	\$46,566
18	Subcontractor/Capital Expenditures				
19	<b>Total Expenditures</b>	<b>\$119,000</b>	<b>\$119,000</b>	<b>\$119,000</b>	<b>\$357,000</b>
20	<b>HSA Revenues</b>				
21	General Fund	\$119,000	\$119,000	\$119,000	\$357,000
22					
23					
24					
25					
26					
27					
28					
29	<b>TOTAL HSA REVENUES</b>	<b>\$119,000</b>	<b>\$119,000</b>	<b>\$119,000</b>	<b>\$357,000</b>
30	<b>Other Revenues</b>				
31					
32					
33					
34					
35					
36	Total Revenues	\$119,000	\$119,000	\$119,000	\$357,000
37	Full Time Equivalent (FTE)				
39	Prepared by: Leny Nair	Telephone No.:	415-677-7682	6/4/2021	
40	HSA-CO Review Signature: _____				
41	<b>HSA #1</b>				<b>6/20/2018</b>

	A	B	C	D	E	F	G	H	J
1	Appendix B, Page 2								
2									
3	<b>SELF-HELP FOR THE ELDERLY</b>								
4	<b>Program: ADULT DAY PROGRAM</b>								
5									
6									
7	<b>Salaries &amp; Benefits Detail</b>								
8									
9									
10									
11		Agency Totals		HSA Program		7/1/21-6/30/22	7/1/22-6/30/23	7/1/23-6/30/24	7/1/21-6/30/24
12	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	DAS Budgeted Salary	DAS Budgeted Salary	DAS Budgeted Salary	TOTAL Budgeted Salary
13	Program Aide 1	\$35,464	0.75	100%	0.75	\$26,598	\$26,598	\$26,598	\$79,794
14	Program Aide 1	\$35,464	0.75	100%	0.75	\$26,598	\$26,598	\$26,598	\$79,794
15	Activity Coordinator	\$41,600	1.00	66%	0.66	\$27,646	\$27,646	\$27,646	\$82,938
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30	TOTALS	\$112,528	2.50	266%	2.16	\$80,842	\$80,842	\$80,842	\$242,526
31									
32	FRINGE BENEFIT RATE	28%							
33	EMPLOYEE FRINGE BENEFITS	\$31,507				\$22,636	\$22,636	\$22,636	\$67,908
34									
35									
36	TOTAL SALARIES & BENEFITS	\$144,035				\$103,478	\$103,478	\$103,478	\$310,434
37	<b>HSA #2</b>	<b>6/20/2018</b>							

**APPENDIX F - SITE CHART**

Human Services Agency, Department of Disability and Aging Services, Office of Community Partnerships

AGENCY: Self Help for the Elderly

FISCAL YEAR: **2021-2022**

CONTRACT: Adult Day Program

DIRECTOR: Ziyang Kelvin Yu

PHONE NO.: 415-677-7556

<b>SITES:</b>	Self Help for the Elderly Adult Day Services				
<b>Name of Site</b>					
Address and Zip	408 22 <sup>nd</sup> Avenue San Francisco, CA 94121				
Phone Number	415-677-7556				
Fax Number	415-666-1899				
Neighborhood	Richmond District				
Muni Line #s	38; 38R; 1; 2				
Person in Charge	Ziyang Kelvin Yu				
Site Manager					
Programs Offered at Site	ADHC, ADP, ADCRC				
Days Open	<input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tues <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thur <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun	<input type="checkbox"/> Mon <input type="checkbox"/> Tues <input type="checkbox"/> Wed <input type="checkbox"/> Thur <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun
Hours Open	8:30AM – 5:00PM				
Hours of <u>scheduled</u> programming	9:15AM – 3:00PM				
Total number of service days in FY	249				
Days closed	11 Days				
ADA Accessible	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No