



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Office of Early Care
and Education

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



London Breed
Mayor

Trent Rhorer
Executive Director

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

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

DATE: MAY 4, 2022

SUBJECT: GRANT MODIFICATION: MULTIPLE GRANTEES (NON-PROFIT) FOR PROVISION OF AGING AND DISABILITIES RESOURCE CENTERS (ADRC)

GRANT TERM:	<u>Current</u> 01/01/21 – 06/30/24	<u>Modification</u> 05/01/22 – 06/30/24	<u>Total</u> 01/01/21 – 06/30/24
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GRANT AMOUNT:	<u>Current</u> \$3,518,494	<u>Modification</u> \$639,460	<u>Revised</u> \$4,157,954	<u>Contingency</u> \$415,795	<u>Total</u> \$4,573,749
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ANNUAL MOD AMOUNT:	<u>FY 21/22</u> \$6,458	<u>FY 22/23</u> \$316,501	<u>FY 23/24</u> \$316,501
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Funding Source	<u>County</u> \$3,950,056	<u>State</u>	<u>Federal</u> \$207,898	<u>Contingency</u> \$415,795	<u>Total</u> \$4,573,749
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FUNDING: PERCENTAGE:	95%	5%	100%
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The Department of Disability and Aging Services (DAS) requests authorization to modify the existing grants with multiple providers for the period of May 1, 2022 to June 30, 2024 in the additional amount of \$639,460 plus a 10% contingency for a revised total amount not to exceed \$4,573,749. The purpose of this modification is to add Tagalog language staffing and maintain an increase in Chinese and Spanish language staffing in order to meet community need and demand.

Agency	Current Grant Amount	FY21-22 Mod Amount	FY22-23 Mod Amount	FY23-24 Mod Amount	FY21-24 Total Mod Amount	Revised FY21-24 Amount	10% Contingency	FY21-24 Total Not to Exceed
Catholic Charities	\$340,129	--	\$39,000	\$39,000	\$78,000	\$418,129	\$41,813	\$459,942
Mission Neighborhood Centers	\$506,090	--	\$90,000	\$90,000	\$180,000	\$686,090	\$68,609	\$754,699
On Lok Day Services	\$631,925	--	\$40,000	\$40,000	\$80,000	\$711,925	\$71,192	\$783,117
Self Help for the Elderly	\$1,448,194	--	\$70,000	\$70,000	\$140,000	\$1,588,194	\$158,819	\$1,747,013
Sequoia Living	\$592,156	\$6,458	\$77,501	\$77,501	\$161,460	\$753,616	\$75,362	\$828,978
TOTAL	\$3,518,494	\$6,458	\$316,501	\$316,501	\$639,460	\$4,157,954	\$415,795	\$4,573,749

Background

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

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

Services to be Provided

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

Modification

The following modifications include:

Catholic Charities

The additional funding supports hiring a half-time Tagalog speaking staff person. This staffing addition will have a significant impact on supporting the language needs of District 11.

Mission Neighborhood Centers

The additional funding supports maintaining funding approved in November 2021 which supports increased Spanish language capacity and added an additional full-time employee with Chinese language capacity. The continued funding will have a significant impact on supporting the language needs of District 9.

On Lok Day Services

The additional funding supports maintaining funding approved in November 2021 which supports an increase in Chinese language capacity staffing from half-time to full-time. This District 8 ADRC has seen an increase in the number of Chinese speaking residents seeking services, and this funding will continue to help address that need.

Sequoia Living

The additional funding supports hiring a full-time Tagalog speaking staff person. This staffing addition will have a significant impact on supporting the language needs of District 6.

Self-Help for the Elderly

The additional funding supports maintaining funding approved in November 2021 which supports an additional full-time Chinese speaking staff person. Self-Help for the Elderly currently operates four ADRC sites across Districts 3, 4, and 7. This additional staff person helps support staffing needs and Chinese language capacity across all their sites and districts.

Selection

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

Funding

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

ATTACHMENTS

Catholic Charities

Appendix A-1, Scope of Services

Appendix B-1, Budget

Mission Neighborhood Centers

Appendix A-2, Scope of Services

Appendix B-2, Budget

On Lok Day Services

Appendix A-2, Scope of Services

Appendix B-2, Budget

Self Help for the Elderly

Appendix A-2, Scope of Services

Appendix B-2, Budget

Sequoia Living

Appendix A-1, Scope of Services

Appendix B-1, Budget

**APPENDIX A-1 – SERVICES TO BE PROVIDED
CATHOLIC CHARITIES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: May 4, 2022**

I. Purpose of Grant

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

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion

- Frail
- Member of the LGBTQ+ Community

IV. Location and Time of Services

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

V. Description of Services

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

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

Services include:

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

ADRC Grantee Responsibilities:

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

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

VI. Service Objectives

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

On an annual basis, Catholic Charities ADRC:

- Will serve the following unduplicated older adults:
 - 560 in FY 20/21
 - 1150 in FY 21/22
 - 1400 in FY 22/23 and FY 23/24
- Will serve the following unduplicated adults with disabilities:
 - 35 in FY 20/21
 - 85 in FY 21/22
 - 120 in FY 22/23
 - 140 in FY 23/24
- Will provide the following units of information and referral services:
 - 750 in FY 20/21
 - 1500 in FY 21/22
 - 1750 in FY 22/23 and FY 23/24
- Will provide the following service units of assistance:
 - 700 in FY 20/21
 - 1300 in FY 21/22
 - 1550 in FY 22/23 and FY 23/24
- Will provide the following units of follow-up services:
 - 200 in FY 20/21
 - 350 in FY 21/22
 - 425 in FY 22/23 and 23/24

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

VII. Outcome Objectives

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

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

VIII. Reporting Requirements

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

- A. Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B. Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C. Grantee shall submit Community Services Block Grant (CSBG) time study to HSA/DAS for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D. Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E. Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F. Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G. Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
 Department of Disability and Aging Services
 PO Box 7988
 San Francisco, CA 94120
 E:mail address: sara.hofverberg@sfgov.org

Patrick Garcia, Contract Manager
 Human Services Agency
 PO Box 7988
 San Francisco, CA 94120
 Email address: patrick.garcia@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name									Term
Catholic Charities									1/1/21 - 6/30/24
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>									
If modification, Effective Date of Mod. 5/1/22 No. of Mod. 1									
Program: Aging and Disability Resource Center (ADRC)									
Budget Reference Page No.(s)									
				(Modification)	Total		(Modification)	Total	(Total)
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Expenditures									
Salaries & Benefits	\$40,027	\$80,146	\$79,613	\$33,914	\$113,527	\$79,613	\$33,914	\$113,527	\$347,227
Operating Expenses	\$1,728	\$4,523	\$5,057		\$5,057	\$5,057		\$5,057	\$16,365
Subtotal	\$41,755	\$84,669	\$84,670	\$33,914	\$118,584	\$84,670	\$33,914	\$118,584	\$363,592
Indirect Percentage (%)	15%	15%	15%		15%	15%		15%	15%
Indirect Cost (Line 16 X Line 15)	\$6,264	\$12,701	\$12,700	\$5,086	\$17,786	\$12,700	\$5,086	\$17,786	\$54,537
Subcontractor/Capital Expenditures									
Total Expenditures	\$48,019	\$97,370	\$97,370	\$39,000	\$136,370	\$97,370	\$39,000	\$136,370	\$418,129
HSA Revenues									
Federal	\$4,517	\$9,144	\$9,144		\$9,144	\$9,144		\$9,144	\$31,949
Local	\$40,649	\$82,297	\$82,297		\$82,297	\$82,297		\$82,297	\$287,540
CODB	\$2,559	\$5,379	\$5,379		\$5,379	\$5,379		\$5,379	\$18,696
MCO	\$294	\$550	\$550		\$550	\$550		\$550	\$1,944
Language Staffing (22/23 - 23/24)				\$39,000	\$39,000		\$39,000	\$39,000	\$78,000
TOTAL HSA REVENUES	\$48,019	\$97,370	\$97,370	\$39,000	\$136,370	\$97,370	\$39,000	\$136,370	\$418,129
Other Revenues									
Total Revenues	\$48,019	\$97,370	\$97,370	\$39,000	\$136,370	\$97,370	\$39,000	\$136,370	\$418,129
Full Time Equivalent (FTE)									
Prepared by: Patty Clement / Rosa Mendez / Delilah Perez						Telephone No.: 415-452-3504 / 415-972-1208			
HSA-CO Review Signature: _____									
HSA #1									

Salaries & Benefits Detail

POSITION TITLE	1/1/21 - 6/30/21					7/1/21 - 6/30/22					7/1/22 - 6/30/23					(Modification) 7/1/22 - 6/30/23		Total 7/1/22 - 6/30/23		7/1/23 - 6/30/24					(Modification) 7/1/23 - 6/30/24		Total 7/1/23 - 6/30/24		(Total) 1/1/21 - 6/30/24								
	Agency Totals		HSA Program			DAS		Agency Totals		HSA Program			DAS		Agency Totals		HSA Program			DAS		Agency Totals		HSA Program			DAS		Agency Totals		HSA Program			DAS		TOTAL	
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary	Budgeted Salary			
Program Director	\$76,899	1.00	10%	0.10	\$3,974	\$80,759	1.00	10%	0.10	\$8,076	\$80,759	1.00	11%	0.11	\$7,890	\$1,081	\$8,771	\$80,759	1.00	11%	0.11	\$7,890	\$934	\$8,824	\$80,759	1.00	100%	1.00	\$43,865	\$1,193	\$45,058	\$156,257	\$29,445				
Infrom/Referral Coordinator #1	\$44,990	1.00	98%	0.98	\$22,068	\$45,254	1.00	97%	0.97	\$43,877	\$45,254	1.00	100%	1.00	\$43,865	\$1,389	\$45,254	\$45,254	1.00	100%	1.00	\$43,865	\$1,193	\$45,058	\$45,254	1.00	20%	0.20	\$7,858	\$39,292	\$47,150	\$7,858	\$27,403				
Prog Assistant Back-Up	\$39,292	1.00	19%	0.19	\$3,829	\$39,292	1.00	20%	0.20	\$7,858	\$39,292	1.00	20%	0.20	\$7,858		\$7,858	\$39,292	1.00	20%	0.20	\$7,858		\$7,858	\$39,292	1.00	51%	0.51	\$23,182	\$23,182	\$46,021						
Infrom/Referral Coordinator #2				-				-		\$45,678	1.00	50%	0.50		\$22,839	\$22,839	\$45,678	1.00	51%	0.51		\$23,182	\$23,182	\$46,021													
TOTALS	\$161,181	3.00	128%	1.28	\$29,871	\$165,305	3.00	127%	1.27	\$59,811	\$210,983	4.00	181%	1.81	\$59,413	\$25,309	\$84,722	\$210,983	4.00	181%	1.81	\$59,413	\$25,309	\$84,722	\$210,983	4.00											
FRINGE BENEFIT RATE	34%				34%				34%					34%			34%							34%													
EMPLOYEE FRINGE BENEFITS	\$54,802				\$10,156	\$56,204			\$20,335	\$71,734				\$20,200	\$8,605	\$28,805	\$71,734					\$20,200	\$8,605	\$28,805	\$71,734												
TOTAL SALARIES & BENEFITS	\$215,983				\$40,027	\$221,509			\$80,146	\$282,717				\$79,613	\$33,914	\$113,527	\$282,717					\$79,613	\$33,914	\$113,527	\$282,717												
HSA #2																																					

Catholic Charities

Program: Aging and Disability Resource Center (ADRC)

Operating Expense Detail

Expenditure Category				(Modification)	Total				(Total)
	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property		\$500	\$979		\$979	\$979		\$979	\$2,458
Utilities(Elec, Water, Gas, Phone, Garbage)	\$670	\$1,360	\$1,360		\$1,360	\$1,360		\$1,360	\$4,750
Office Supplies, Postage		\$265	\$320		\$320	\$320		\$320	\$905
Building Maintenance Supplies and Repair	\$100	\$200	\$200		\$200	\$200		\$200	\$700
Printing and Reproduction	\$50								\$50
Insurance	\$849	\$1,698	\$1,698		\$1,698	\$1,698		\$1,698	\$5,943
Staff Training		\$100	\$100		\$100	\$100		\$100	\$300
Staff Travel-(Local & Out of Town)	\$59	\$300	\$300		\$300	\$300		\$300	\$959
Rental of Equipment									
<u>Consultants/Subcontractors</u>									
<u>Other</u>									
Computer Related		\$100	\$100		\$100	\$100		\$100	\$300
TOTAL OPERATING EXPENSES	\$1,728	\$4,523	\$5,057		\$5,057	\$5,057		\$5,057	\$16,365

HSA #3

**APPENDIX A-2 – SERVICES TO BE PROVIDED
MISSION NEIGHBORHOOD CENTERS
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: May 4, 2022**

I. Purpose of Grant

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

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

- Low-income
- Non or limited –English speaking
- Minority as defined by race and/or ethnicity, religion
- Frail

- Member of the LGBTQ+ Community

IV. **Location and Time of Services**

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

V. **Description of Services**

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

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

Services include:

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

ADRC Grantee Responsibilities:

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

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

VI. Service Objectives

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

On an annual basis, Mission Neighborhood Centers ADRC:

- Will serve the following unduplicated older adults:
 - 600 in FY 20/21
 - 1750 in FY 21/22
 - 2250 in FY 22/23-FY23/24
- Will serve the following unduplicated adults with disabilities:
 - 60 in FY 20/21
 - 200 in FY 21/22
 - 250 in FY 22/23-FY23/24
- Will provide the following units of information and referral services:
 - 1200 in FY 20/21
 - 2100 in FY 21/22
 - 2800 in FY 22/23-FY23/24
- Will provide the following service units of assistance:
 - 1100 in FY 20/21
 - 1900 in FY 21/22
 - 2500 in FY 22/23-FY23/24
- Will provide the following units of follow-up services:
 - 175 in FY 20/21
 - 425 in FY 21/22
 - 500 in FY 22/23-FY23/24

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

VII. Outcome Objectives

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

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

VIII. Reporting Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
Email address: sara.hofverberg@sfgov.org

Tara Alvarez, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: tara.alvarez@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

	A	B	C	D	E	F	G	H	I	J
1										
2										
3										
4										
5	Name		Term							
6	Agency Name: Mission Neighborhood Centers, Inc.		1/1/21-6/30/24							
7	(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>									
8	If modification, Effective Date of Mod. 04.15.22 No. of Mod. 2									
9	Program: ADRC									
10	Budget Reference Page No.(s)									1/1/21-6/30/24
11	Program Term	1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23	REVISION 7/1/22-6/30/23	TOTAL 7/1/22-6/30/23	7/1/23-6/30/24	REVISION 7/1/23-6/30/24	TOTAL 7/1/23-6/30/24	Total
12	Expenditures									
13	Salaries & Benefits	\$43,274	\$172,620	\$101,773	\$77,061	\$178,834	\$101,773	\$77,061	\$178,834	\$573,561
14	Operating Expenses	\$9,997	\$8,490	\$1,076	\$1,200	\$2,276	\$1,076	\$1,200	\$2,276	\$23,039
15	Subtotal	\$53,271	\$181,110	\$102,849	\$78,261	\$181,110	\$102,849	\$78,261	\$181,110	\$596,600
16	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%	15%	15%	15%
17	Indirect Cost (Line 16 X Line 15)	\$7,991	\$27,166	\$15,427	\$11,739	\$27,166	\$15,427	\$11,739	\$27,166	\$89,490
19	Total Expenditures	\$61,262	\$208,276	\$118,276	\$90,000	\$208,276	\$118,276	\$90,000	\$208,276	\$686,090
20	HSA Revenues									
21	General Fund	\$61,262	\$111,843	\$111,843		\$111,843	\$111,843		\$111,843	\$396,790
22	20/21 CODB		\$2,988	\$2,988		\$2,988	\$2,988		\$2,988	\$8,964
23	21/22 CODB		\$3,445	\$3,445		\$3,445	\$3,445		\$3,445	\$10,335
24	Addback		\$90,000		\$90,000	\$90,000		\$90,000	\$90,000	\$270,000
25										
26										
27										
28										
29	TOTAL HSA REVENUES	\$61,262	\$208,276	\$118,276	\$90,000	\$208,276	\$118,276	\$90,000	\$208,276	\$686,090
30	Other Revenues									
31										
32										
33										
34										
35										
36	Total Revenues	\$61,262	\$208,276	\$118,276	\$90,000	\$208,276	\$118,276	\$90,000	\$208,276	\$686,090
37	Full Time Equivalent (FTE)	2.52	2.52	1.50		2.52	1.50		2.52	
39	Prepared by: Aurora Alvarado		Telephone No.: 415.206.7750							
40	HSA-CO Review Signature: _____									
41	HSA #1 4/15/2022									

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1																		
2																		
3																		
4	Program: ADRC																	
5																		
6																		
7	Salaries & Benefits Detail																	
8																		
9																		
10																		
11																		
		1/1/21-6/30/21				7/1/21-6/30/22				7/1/22-6/30/23				7/1/23-6/30/24				1/1/21-6/30/24
		Agency Totals		HSA Program		DAAS	DAAS	DAAS	HSA Program		HSA Program		DAAS	DAAS	DAAS	TOTAL		
		Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Budgeted Salary	Budgeted Salary	% FTE funded by HSA (Max 100%)	Adjusted FTE	REVISION 7/1/22-6/30/23	TOTAL 7/1/22-6/30/23	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	REVISION 7/1/23-6/30/24	TOTAL 7/1/23-6/30/24	Budgeted Salary
12	POSITION TITLE																	
13	Community Resource Coordinator	\$61,901	1.00	75%	0.75	\$24,781	\$47,599	\$42,034	75%	0.75	\$4,392	\$46,426	75%	0.75	\$42,034	\$4,392	\$46,426	\$165,231
14	I & A Specialist (English/Spanish)	\$50,960	1.00	75%	0.75	\$8,883	\$38,088	\$34,705	75%	0.75	\$3,515	\$38,220	75%	0.75	\$34,705	\$3,515	\$38,220	\$123,411
15	I & A Specialist (English/Chinese)	\$50,960	1.00	55%	0.55		\$26,068		100%	1.00	\$50,960	\$50,960	100%	1.00		\$50,960	\$50,960	\$127,988
16	I & A Specialist (English/Russian)	\$50,960	1.00	45%	0.45		\$19,551											\$19,551
17	Program Director	\$97,938	1.00	2%	0.02	\$385	\$1,578	\$950	2%	0.02	\$1,009	\$1,959	2%	0.02	\$950	\$1,009	\$1,959	\$5,881
18																		
19																		
20																		
21																		
22																		
23																		
24																		
25																		
26																		
27																		
28																		
29																		
30																		
31																		
32	TOTALS			2.52	2.52	\$34,049	\$132,884	\$77,689		2.52	\$59,875	\$137,564		2.52	77,689	\$59,875	\$137,564	\$442,062
33																		
34	FRINGE BENEFIT RATE		30%															
35	EMPLOYEE FRINGE BENEFITS					\$9,225	\$39,736	\$24,084			\$17,185	\$41,269			\$24,084	\$17,185	\$41,269	\$131,500
36																		
37																		
38	TOTAL SALARIES & BENEFITS	\$0				\$43,274	\$172,620	\$101,773			\$77,061	\$178,834			101,773	\$77,061	\$178,834	\$573,561
39	HSA #2																	

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	
1																								
2																								
3	Agency Name: Mission Neighborhood Centers, Inc.																							
4	Program: ADRC																							
5																								
6																								
7	Operating Expense Detail																							
8																								
9																								
10																								
11																								
12																								TOTAL
					1/1/21-6/30/21	7/1/21-6/30/22	7/1/22-6/30/23																	
				TERM																				
13	Expenditure Category																							
14	Rental of Property																							
15	Utilities(Elec, Water, Gas, Phone, Garbage)				\$726	\$1,200	\$790	\$410	\$1,200	\$790	\$410	\$1,200	\$790	\$410	\$1,200	\$790	\$410	\$1,200	\$790	\$410	\$1,200	\$790	\$410	\$ 4,326
16	Office Supplies, Postage				\$2,692	\$1,500																		\$ 4,192
17	Building Maintenance Supplies and Repair				\$2,557	\$850	\$113	\$7	\$120	\$113	\$7	\$120	\$113	\$7	\$120	\$113	\$7	\$120	\$113	\$7	\$120	\$113	\$7	\$ 3,647
18	Printing and Reproduction					\$500																		\$ 500
19	Insurance				\$176	\$740	\$173		\$740	\$173		\$740	\$173		\$740	\$173		\$740	\$173		\$740	\$173		\$ 2,396
20	Staff Training																							\$ -
21	Staff Transportation					\$800			\$216			\$216			\$216			\$216			\$216			\$ 1,232
22	Tech/Wifi Equipment					\$1,800																		\$ 1,800
23	CONSULTANTS																							
24																								
25																								
26																								
27	OTHER																							
28	Covid-19 Emergency Response				\$1,469																			\$ 1,469
29	Fuel Maint & Repair				\$0	\$200																		\$ 200
30	Food Supplies				\$557	\$300																		\$ 857
31	Janitorial Supplies				\$1,820	\$600																		\$ 2,420
32																								
33	TOTAL OPERATING EXPENSE				\$ 9,997	\$ 8,490	\$ 1,076	\$ 417	\$ 2,276	\$ 1,076	\$ 417	\$ 2,276	\$ 1,076	\$ 417	\$ 2,276	\$ 1,076	\$ 417	\$ 2,276	\$ 1,076	\$ 417	\$ 2,276	\$ 1,076	\$ 417	\$ 23,039
34																								
35	HSA #3																							4/15/2022

**APPENDIX A-2 – SERVICES TO BE PROVIDED
ON LOK DAY SERVICES
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: May 4, 2022**

I. Purpose of Grant

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

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

IV. Location and Time of Services

Services will be provided at the On Lok 30th Street Senior Center located at 225 30th Street, San Francisco, CA 94131. Hours of operation are from 8:30am-5pm, Monday to Saturday

V. Description of Services

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

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

Services include:

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

ADRC Grantee Responsibilities:

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

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

VI. Service Objectives

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

On an annual basis, On Lok Day Services ADRC:

- Will serve the following unduplicated older adults:
 - 809 in FY 20/21
 - 1780 in FY 21/22
 - 1940 in FY 22/23 and FY 23/24
- Will serve the following unduplicated adults with disabilities:
 - 140 in FY 20/21
 - 335 in FY 21/22
 - 308 in FY 22/23 and FY 23/24
- Will provide the following units of information and referral services:
 - 1296 in FY 20/21
 - 2850 in FY 21/22
 - 3110 in FY 22/23 and FY 23/24
- Will provide the following service units of assistance:
 - 1273 in FY 20/21
 - 2800 in FY 21/22
 - 3055 in FY 22/23 and FY 23/24
- Will provide the following units of follow-up services:
 - 826 in FY 20/21
 - 1815 in FY 21/22
 - 1980 in FY 22/23 and FY 23/24

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

VII. Outcome Objectives

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

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

VIII. Reporting Requirements

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

- A.** Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- B.** Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- C.** Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- D.** Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- E.** Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- F.** Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- G.** Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
E:mail address: sara.hofverberg@sfgov.org

Patrick Garcia, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: patrick.garcia@sfgov.org

IX. Monitoring Activities

- A.** Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting;

evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.

- B.** Fiscal Compliance and Contract Monitoring: Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

Name									Term
On-Lok Day Services									1/1/21 - 6/30/24
(Check One) New <input type="checkbox"/> Renewal <input type="checkbox"/> Modification <input checked="" type="checkbox"/>									
If modification, Effective Date of Mod. 5/4/22 No. of Mod. 2									
Program: Aging and Disability Resource Center (ADRC)									
Budget Reference Page No.(s)				(Modification)	Total		(Modification)	Total	(Total)
Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Expenditures									
Salaries & Benefits	\$69,190	\$176,230	\$141,114	\$34,604	\$175,718	\$141,114	\$34,604	\$175,718	\$596,856
Operating Expenses	\$10,759	\$3,476	\$3,809	\$178	\$3,987	\$3,809	\$178	\$3,987	\$22,209
Subtotal	\$79,949	\$179,706	\$144,923	\$34,782	\$179,705	\$144,923	\$34,782	\$179,705	\$619,065
Indirect Percentage (%)	15%	15%	15%		15%	15%		15%	15%
Indirect Cost (Line 16 X Line 15)	\$11,993	\$26,955	\$21,738	\$5,218	\$26,956	\$21,738	\$5,218	\$26,956	\$92,860
Subcontractor/Capital Expenditures									
Total Expenditures	\$91,942	\$206,661	\$166,661	\$40,000	\$206,661	\$166,661	\$40,000	\$206,661	\$711,925
HSA Revenues									
Federal	\$8,797	\$15,764	\$15,764		\$15,764	\$15,764		\$15,764	\$56,089
Local	\$79,169	\$141,879	\$141,879		\$141,879	\$141,879		\$141,879	\$504,806
CODB	\$3,746	\$8,588	\$8,588		\$8,588	\$8,588		\$8,588	\$29,510
MCO	\$230	\$430	\$430		\$430	\$430		\$430	\$1,520
Lanugage Staffing (21/22 - 23/24)		\$40,000		\$40,000	\$40,000		\$40,000	\$40,000	\$120,000
TOTAL HSA REVENUES	\$91,942	\$206,661	\$166,661	\$40,000	\$206,661	\$166,661	\$40,000	\$206,661	\$711,925
Other Revenues									
Fundraising		\$35,625	\$30,773	\$5,031	\$35,804	\$30,773	\$5,031	\$35,804	\$107,232
Total Revenues	\$91,942	\$242,286	\$197,434	\$45,031	\$242,465	\$197,434	\$45,031	\$242,465	\$819,157
Full Time Equivalent (FTE)	2.19	2.92	3.29	0.71	4.00	3.29	0.71	4.00	13.11
Prepared by:	Meko Ma								(628)208-8546
HSA-CO Review Signature:	_____								
HSA #1									

Program: Aging and Disability Resource Center (ADRC)

Operating Expense Detail

H.S.A-DAS Expenditure Category				(Modification)	Total				(Total)
	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property									\$ -
Utilities(Elec, Water, Gas, Phone, Garbage)	\$ 1,091	\$722	\$714		\$714	\$714		\$714	\$ 3,241
Office Supplies, Postage	\$ 2,584	\$192	\$564	\$178	\$742	\$564	\$178	\$742	\$ 4,260
Building Maintenance Supplies and Repair	\$ 1,818								\$ 1,818
Printing and Reproduction	\$ 750	\$497	\$491		\$491	\$491		\$491	\$ 2,229
Insurance	\$ 523	\$347	\$343		\$343	\$343		\$343	\$ 1,556
Staff Training	\$ 100	\$497	\$491		\$491	\$491		\$491	\$ 1,579
Staff Travel-(Local & Out of Town)	\$ 150	\$497	\$491		\$491	\$491		\$491	\$ 1,629
Rental of Equipment	\$ 437	\$90	\$89		\$89	\$89		\$89	\$ 705
CONSULTANTS									\$ -
									\$ -
									\$ -
									\$ -
									\$ -
OTHER									
Payroll Processing	\$ 179	86	\$85		\$85	\$85		\$85	\$ 435
Data Plan	\$ 827	548	\$541		\$541	\$541		\$541	\$ 2,457
Recruiting Fee	\$ 2,300								\$ 2,300
									\$ -
									\$ -
TOTAL DAS OPERATING EXPENSE	\$10,759	\$3,476	\$3,809	\$178	\$3,987	\$3,809	\$178	\$3,987	\$ 22,209
Non-DAS									TOTAL
Expenditure Category	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21 - 6/30/24
Rental of Property									\$ -
Utilities(Elec, Water, Gas, Phone, Garbage)		\$1,460	\$1,468		\$1,468	\$1,468		\$1,468	\$ 4,396
Office Supplies, Postage		\$388	\$16		\$16	\$16		\$16	\$ 420
Building Maintenance Supplies and Repair		\$3,000	\$3,000		\$3,000	\$3,000		\$3,000	\$ 9,000
Printing and Reproduction		\$1,003	\$1,009		\$1,009	\$1,009		\$1,009	\$ 3,021
Insurance		\$700	\$704		\$704	\$704		\$704	\$ 2,107
Staff Training		\$1,003	\$1,009		\$1,009	\$1,009		\$1,009	\$ 3,021
Staff Travel-(Local & Out of Town)		\$1,003	\$1,009		\$1,009	\$1,009		\$1,009	\$ 3,021
Rental of Equipment		\$183	\$184		\$184	\$184		\$184	\$ 552
CONSULTANTS									\$ -
									\$ -
									\$ -
									\$ -
									\$ -
OTHER									
Payroll Processing		173	174		174	174		174	\$ 521
Data Plan		1,106	1,113		1,113	1,113		1,113	\$ 3,332
									\$ -
									\$ -
									\$ -
TOTAL Non-DAS OPERATING EXPENSES		\$10,019	\$9,686		\$9,686	\$9,686		\$9,686	\$ 29,390
TOTAL DAAS & Non-DAS OPERATING EXPENSE	\$10,759	\$13,495	\$13,495	\$178	\$13,673	\$13,495	\$178	\$13,673	\$ 51,599
HSA #3									

**APPENDIX A-2 – SERVICES TO BE PROVIDED
SELF-HELP FOR THE ELDERLY
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: May 4, 2022**

I. Purpose of Grant

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

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

IV. **Location and Time of Services**

The services for Self-Help for the Elderly will be provided at 4 locations: 601 Jackson Street, San Francisco, CA 94133 and 777 Stockton Street, San Francisco CA 94108, 131 Lenox Way, San Francisco, CA 94127 and 2601 40th Avenue, San Francisco, CA 94116. Hours of operation at 601 Jackson Street and 777 Stockton Street are from 9:00am-5pm, Monday to Friday. Hours of operation at 131 Lenox Way and 2601 40th Avenue are from 9:00am-2:00pm, Monday to Friday.

V. **Description of Services**

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

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

Services include:

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

ADRC Grantee Responsibilities:

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

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

VI. Service Objectives

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

On an annual basis, Self-Help for the Elderly ADRC:

- Will serve the following unduplicated older adults:
 - 2400 in FY 20/21
 - 5160 in FY 21/22
 - 5520 in FY 22/23 and FY 23/24
- Will serve the following unduplicated adults with disabilities:
 - 200 in FY 20/21
 - 515 in FY 21/22
 - 550 in FY 22/23 and FY 23/24
- Will provide the following units of information and referral services:
 - 2840 in FY 20/21
 - 6100 in FY 21/22
 - 65309n FY 22/23 and FY 23/24
- Will provide the following service units of assistance:
 - 5000 in FY 20/21
 - 10,750 in FY 21/22
 - 11500 in FY 22/23 and FY 23/24
- Will provide the following units of follow-up services:
 - 850 in FY 20/21
 - 1825 in FY 21/22
 - 1955 in FY 22/23 and FY 23/24

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

VII. Outcome Objectives

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

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

VIII. Reporting Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link: <https://calmaa.hfa3.org/signin>
- Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
E:mail address: sara.hofverberg@sfgov.org

Tahir Shaikh, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: tahir.shaikh@sfgov.org

IX. Monitoring Activities

- Program Monitoring: Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up

documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.

- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
BY PROGRAM**

	A	E	L	M	N	O	R	S	T	U	
1											
2											
3											
4											
5	Name							Term			
6	SELF-HELP FOR THE ELDERLY							1/1/21 - 6/30/24			
7	(Check One) New ___ Renewal ___ Modification <u> x </u>										
8	If modification, Effective Date of Mod.										
9	Program: ADRC										
10	Budget Reference Page No.(s)	Budget	Budget	Budget	Modification	Revised	Budget	Modification	Revised	Total	
11	Program Term	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21-6/30/24	
12	Expenditures										
13	Salaries & Benefits	\$140,020	\$359,483	\$319,636	\$60,570	\$380,206	\$319,636	\$60,570	\$380,206	\$1,259,915	
14	Operating Expenses	\$18,864	\$33,571	\$23,418	\$300	\$23,718	\$23,418	\$300	\$23,718	\$99,871	
15	Subtotal	\$158,884	\$393,054	\$343,054	\$60,870	\$403,924	\$343,054	\$60,870	\$403,924	\$1,359,786	
16	Indirect Percentage (%)	15%	15%	15%	15%	15%	15%		15%	15%	
17	Indirect Cost (Line 16 X Line 15)	\$23,859	\$58,959	\$51,459	\$9,130	\$60,589	\$51,459	\$9,130	\$60,589	\$203,996	
18	Subcontractor/Capital Expenditures	\$11,912	\$12,500							\$24,412	
19	Total Expenditures	\$194,655	\$464,513	\$394,513	\$70,000	\$464,513	\$394,513	\$70,000	\$464,513	\$1,588,194	
20	HSA Revenues										
21											
22	General Fund (87%)	\$169,349	\$321,154	\$321,154		\$321,154	\$321,154		\$321,154	\$1,132,811	
23	Federal Fund (13%)	\$25,306	\$47,988	\$47,988		\$47,988	\$47,988		\$47,988	\$169,270	
24	MCO		\$3,827			\$0			\$0	\$3,827	
25	CODB		\$21,544	\$25,371		\$25,371	\$25,371		\$25,371	\$72,286	
26	OTO		\$70,000			\$0			\$0	\$70,000	
27	Additional Funding 4/19/22				\$70,000	\$70,000		\$70,000	\$70,000	\$140,000	
28	TOTAL HSA REVENUES	\$194,655	\$464,513	\$394,513	\$70,000	\$464,513	\$394,513	\$70,000	\$464,513	\$1,588,194	
29	Other Revenues										
30											
31											
32											
33											
34											
35											
36											
37	Total Revenues	\$194,655	\$464,513	\$394,513	\$70,000	\$464,513	\$394,513	\$70,000	\$464,513	\$1,588,194	
38	Full Time Equivalent (FTE)										
40	Prepared by: Leny Nair	Leny Nair							415-677-7682		
41	HSA-CO Review Signature:	_____									
42	HSA #1										

	A	B	C	D	E	I	L	Q	R	S	V	W	X	Y
1	SELF-HELP FOR THE ELDERLY													Appendix B-2, Page 2
2	Program: ADRC													4/21/2022
3														
4														
5	Salaries & Benefits Detail													
6														
7														
8		Agency Totals		HSA Program										TOTAL
9	POSITION TITLE	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	SALARIES BUDGET	Budgeted Salary	Budgeted Salary	Modification	Revised Budgeted Salary	Budgeted Salary	Modification	Revised Budgeted Salary	Budgeted Salary
10	I & A Specialist-Jackson Street	\$47,320	1.00	100.00	1.00	\$22,810	\$47,320	\$47,320		\$47,320	\$47,320		\$47,320	\$164,770
11	I & A Specialist-Jackson Street	\$47,320	1.00	100.00	1.00	\$17,620	\$47,320	\$47,320		\$47,320	\$47,320		\$47,320	\$159,580
12	I & A Specialist-Geen Mun	\$47,320	1.00	100.00	1.00	\$22,810	\$47,320	\$47,320		\$47,320	\$47,320		\$47,320	\$164,770
13	I & A Specialist-South Sunset	\$47,320	0.80	100.00	0.80	\$16,620	\$35,776	\$35,776		\$35,776	\$35,776		\$35,776	\$123,948
14	I & A Specialist-West Portal	\$47,320	1.00	100.00	1.00	\$14,620	\$47,320	\$47,320		\$47,320	\$47,320		\$47,320	\$156,580
15	Director of Social Services	\$94,000	1.00	100.00	0.14	\$10,200	\$13,400	\$13,400		\$13,400	\$13,400		\$13,400	\$50,400
16	I & A Specialist-Geen Mun	\$47,320	1.00	100.00	1.00		\$47,320	\$0	\$47,320	\$47,320	\$0	\$47,320	\$47,320	\$128,960
17	Program Manager	\$78,000	1.00	100.00	0.13		\$10,500	\$10,500		\$10,500	\$10,500		\$10,500	\$31,500
18														
19														
20														
21														
22														
23														
24														
25														
26														
27	TOTALS	\$455,920	7.80	80000%	6.07	\$104,680	\$296,276	\$248,956	\$47,320	\$296,276	\$248,956	\$47,320	\$296,276	\$980,508
28														
29	FRINGE BENEFIT RATE	28%												
30	EMPLOYEE FRINGE BENEFITS	\$127,658				\$35,340	\$82,237	\$70,680	\$13,250	\$83,930	\$70,680	\$13,250	\$83,930	\$279,407
31														
32														
33	TOTAL SALARIES & BENEFITS	\$583,578				\$140,020	\$378,513	\$319,636	\$60,570	\$380,206	\$319,636	\$60,570	\$380,206	\$1,259,915
34	HSA #2													6/20/2018

	A	B	H	I	N	Q	T	U	V	W	X	Y
1	SELF-HELP FOR THE ELDERLY											Appendix B-2, Page 3
2	Program: ADRC											4/21/2022
3												
4												
5	Operating Expense Detail											
6												
7		BUDGET	Budget	Budget	Modification	Revised Budget	Budget	Modification	Revised Budget	TOTAL		
8	<u>Expenditure Category</u>	1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/22 - 6/30/23	7/1/23 - 6/30/24	7/1/23 - 6/30/24	7/1/23 - 6/30/24	1/1/21 - 6/30/24		
9	Rental of Property	\$4,052	\$17,407	\$16,809	\$300	\$17,109	\$16,809	\$300	\$17,109	\$55,677		
10	Phone, Garbage)	\$773	\$1,546	\$1,546		\$1,546	\$1,546		\$1,546	\$5,411		
11	Office Supplies, Postage	\$2,500	\$3,838	\$600		\$600	\$600		\$600	\$7,538		
12	Supplies and Repair	\$3,000	\$1,563	\$563		\$563	\$563		\$563	\$5,689		
13	Printing and Reproduction											
14	Insurance	\$1,300	\$2,417	\$1,600		\$1,600	\$1,600		\$1,600	\$6,917		
15	Staff Training											
16	Staff Travel-(Local & Out of Town)	\$2,500	\$250	\$250		\$250	\$250		\$250	\$3,250		
17	Rental of Equipment	\$339	\$250	\$250		\$250	\$250		\$250	\$1,089		
18												
19	CONSULTANTS											
20												
21												
22												
23												
24												
25												
26	OTHER											
27	Communications(cell phone allowances)	\$4,400	\$1,800	\$1,800		\$1,800	\$1,800		\$1,800	\$9,800		
28	Outreach/Workshops		\$2,000							\$2,000		
29	Uniforms		\$1,500							\$1,500		
30	PPE		\$1,000							\$1,000		
31												
32												
33	TOTAL OPERATING EXPENSES	\$18,864	\$33,571	\$23,418	\$300	\$23,718	\$23,418	\$300	\$23,718	\$99,871		
34												
35	HSA #3											6/20/2018

	A	B	C	D	E	F	G
1	SELF-HELP FOR THE ELDERLY						Appendix B-2, Page 4
2	Program: ADRC						4/21/2022
3							
4							
5	Subcontractor/Capital Expenditures						
6							
7	SUBCONTRACTORS		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
8	Subcontractor 1						\$0
9	Subcontractor 2						\$0
10							\$0
11							\$0
12							\$0
13	TOTAL SUBCONTRACTOR COST		\$0	\$0	\$0	\$0	\$0
14							
15							
16	EQUIPMENT		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
17	Units	ITEM/DESCRIPTION					
18	2	Laser Printer	\$1,000				\$1,000
19	2	Portable Printer	\$800				\$800
20	2	Cisco Switch for data & phone	\$4,608				\$4,608
21	1	Cisco Backbone switch	\$977				\$977
22	1	Veeam Backup Replication	\$4,527				\$4,527
23	5	Desktops		\$7,500			
24	2	Laptops		\$4,000			
25	1	Scanner		\$1,000			
26							
27							
28	TOTAL EQUIPMENT COST		\$11,912	\$12,500	\$0	\$0	\$24,412
29							
30	REMODELING		1/1/21 - 6/30/21	7/1/21 - 6/30/22	7/1/22 - 6/30/23	7/1/23 - 6/30/24	1/1/21 - 6/30/24
31	Description:						
32	Remodel A						
33							
34							
35							
36							
37	TOTAL REMODELING COST						
38							
39	TOTAL SUBCONTRACTOR/CAPITAL EXPENDITURE		\$11,912	\$12,500	\$0	\$0	\$24,412
40							
41	HSA #4						6/20/2018

APPENDIX A-1 – SERVICES TO BE PROVIDED
SEQUOIA LIVING
AGING AND DISABILITIES RESOURCE CENTER (ADRC)
January 1, 2021 to June 30, 2024
Modification: May 4, 2022

I. Purpose of Grant

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

II. Definitions

ADRC	An Aging and Disability Resource Center (ADRC) specializes in information from a broad perspective, referral between a wide array of organizations and public awareness of long term service and support (LTSS) options. To fulfill this function, ADRC locations are where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options.
Adult with a Disability	Person 18 years of age or older living with a disability
CARBON	Contracts Administration, Reporting and Billing On Line System
Caregiver	An adult (18 years or older) family member or another individual (e.g. friend or neighbor) who is an informal (i.e. unpaid) provider of in-home or community care to a care receiver.
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Disability	A condition or combination of conditions that is attributable to a mental, cognitive or physical impairment, including hearing and visual impairments, that results in substantial functional limitations in one (1) or more of the following areas of major life activity: a) Self-care: activities of daily living (ADL), and instrumental activities of daily living (IADL); b) Capacity for independent living and self-direction; c) Cognitive functioning, and emotional adjustment.
Follow-Up	To determine the outcome of a referral by contacting the client and/or organizations to which a referral was made.

Frail	An individual determined to be functionally impaired in one or both of the following areas: (a) unable to perform two or more activities of daily living (such as bathing, toileting, dressing, eating, and transferring) without substantial human assistance, including verbal reminding, physical cueing or supervision; (b) due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or others.
HSA	San Francisco Human Services Agency
LGBTQ+	An acronym/term used to refer to persons who self-identify as non - heterosexual and/or whose gender identity does not correspond to their birth sex. This includes, but is not limited to, lesbian, gay, bisexual, transgender, genderqueer, and gender non-binary.
Low Income	Having income at or below 300% of the federal poverty line defined by the federal Bureau of the Census and published annually by the U.S. Department of Health and Human Services. This is only to be used by clients to self-identify their income status, not to be used as a means test to qualify for the program.
Minority	An ethnic person of color who is any of the following: (a) Black – a person having origins in any of the Black racial groups of Africa; (b) Hispanic – a person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish or Portuguese culture or origin regardless of race; (c) Asian/Pacific Islander – a person whose origins are from India, Pakistan or Bangladesh, Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, or the United States Territories of the Pacific including the Northern Marianas; (d) American Indian/Alaskan Native – an American Indian, Eskimo, Aleut, or Native Hawaiian. Source: California Code of Regulation Sec. 7130.
Senior/Older Adult	Person who is 60 years of age or older

III. Target Population

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

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

IV. Location and Time of Services

Services will be provided at both San Francisco Senior Center locations: 481 O’Farrell Street, San Francisco, CA 94102 (Downtown Center), and 890 Beach Street, San Francisco, CA 94109 (Aquatic Park

Center). Downtown Center hours of operation are Monday-Thursday 9am-4pm and Friday 9am-3:30pm. Aquatic Park Center hours are Monday-Friday 9am-4pm.

V. Description of Services

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

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

Services include:

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

ADRC Grantee Responsibilities:

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

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

VI. Service Objectives

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

On an annual basis, Sequoia Living ADRC:

- Will serve the following unduplicated older adults:
892 in FY 20/21
1785 in FY 21/22
2320 in FY 22/23
2675 in FY 23/24
- Will serve the following unduplicated adults with disabilities:
90 in FY 20/21
180 in FY 21/22
234 in FY 22/23
270 in FY 23/24
- Will provide the following units of information and referral services:
1050 in FY 20/21
2100 in FY 21/22
2730 in FY 22/23
3150 in FY 23/24
- Will provide the following service units of assistance:
1050 in FY 20/21
2100 in FY 21/22
2730 in FY 22/23
3150 in FY 23/24
- Will provide the following units of follow-up services:
525 in FY 20/21
1050 in FY 21/22
1365 in FY 22/23
1575 in FY 23/24

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

VII. Outcome Objectives

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

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

VIII. Reporting Requirements

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

- Grantee will provide a **monthly** report of activities, referencing the tasks as described in Section VI & VII- Service and Outcome Objectives. Grantee will enter the monthly metrics in the CARBON database by the 15th of the following month. Monthly service objectives include an unduplicated older adult client count, unduplicated adult with disability client count, information and referral, assistance, and follow-up service units.
- Grantee shall input all required data into SFGetCare on a monthly basis. Grantee is required to input monthly unit of service reports into the Service Recording Tool by the 5th working day of the month for the preceding month.
- Grantee shall submit Community Services Block Grant (CSBG) time study to DAS/HSA for the months of February, May, August and November, if applicable. The time study is due on the 10th day following the time study month and shall be entered on line to this website link:
<https://calmaa.hfa3.org/signin>
- Grantee shall develop and deliver ad hoc reports as requested by DAS/HSA.
- Grantee shall develop and deliver a bi-annual summary report of SOGI data collected as requested by DAS/HSA. The due dates for submitting the summary reports are January 10 (for July 1 – December 31 data) and July 10 (for January 1 – June 30 data).
- Grantee shall be compliant with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) privacy and security rules to the extent applicable and to take all reasonable efforts to implement HIPAA requirements.
- Apart from reports requested to be sent via e-mail to the Program Analyst and/or Contract Manager, all other reports should be sent to the following addresses:

Sara Hofverberg, Program Analyst
Department of Disability and Aging Services
PO Box 7988
San Francisco, CA 94120
E:mail address: sara.hofverberg@sfgov.org

and

Ella Lee, Contract Manager
Human Services Agency
PO Box 7988
San Francisco, CA 94120
Email address: ella.lee@sfgov.org

IX. Monitoring Activities

- A. Program Monitoring:** Program monitoring will include review of compliance specific program standards or requirements; client eligibility and targeted mandates, back up documentation for the units of service and all reporting, and progress of service and outcome objectives; how participant records are collected and maintained; reporting performance including monthly service unit reports on ir2.sfgetcare.com, maintenance of service unit logs; agency and organization standards, which include current organizational chart, evidence of provision of training to staff regarding the Elder Abuse Reporting; evidence that program staff have completed the California Department of Aging (CDA) Security Awareness Training; program operation, which includes a review of a written policies and procedures manual of all OCP funded programs, written project income policies if applicable, grievance procedure posted in the center/office, and also given to the consumers who are homebound, hours of operation are current according to the site chart; a board of director list and whether services are provided appropriately according to Sections V and VI.
- B. Fiscal Compliance and Contract Monitoring:** Fiscal monitoring will include review of the Grantee's organizational budget, the general ledger, quarterly balance sheet, cost allocation procedures and plan, State and Federal tax forms, audited financial statement, fiscal policy manual, supporting documentation for selected invoices, cash receipts and disbursement journals. The compliance monitoring will include review of Personnel Manual, Emergency Operations Plan, Compliance with the Americans with Disabilities Act, subcontracts, and MOUs, and the current board roster and selected board minutes for compliance with the Sunshine Ordinance.

**HUMAN SERVICES AGENCY BUDGET SUMMARY
 BY PROGRAM**

Name
Sequoia Living

Term
 1/1/21 - 6/30/24

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

Program: Aging and Disability Resource Center

Budget Reference Page No.(s)	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
Program Term	Revised	Budget	Modification 5/1/22 - 6/30/22	Revised	Budget	Modification	Revised	Budget	Modification	Revised	Budget		
Expenditures													
Salaries & Benefits	\$56,541	\$132,818	\$5,616	\$138,434	\$147,026	\$67,392	\$214,418	\$147,026	\$67,392	\$214,418	\$147,026	\$623,811	
Operating Expenses	\$16,968	\$14,318		\$14,318	\$110		\$110	\$110		\$110	\$110	\$31,506	
Subtotal	\$73,509	\$147,136	\$5,616	\$152,752	\$147,136	\$67,392	\$214,528	\$147,136	\$67,392	\$214,528	\$147,136	\$655,317	
Indirect Percentage (%)	15%	15%		15%	15%		15%	15%		15%	15%	15%	
Indirect Cost (Line 16 X Line 15)	\$11,026	\$22,071	\$842	\$22,913	\$22,071	\$10,109	\$32,180	\$22,071	\$10,109	\$32,180	\$22,071	\$98,299	
Subcontractor/Capital Expenditures													
Total Expenditures	\$84,535	\$169,207	\$6,458	\$175,665	\$169,207	\$77,501	\$246,708	\$169,207	\$77,501	\$246,708	\$169,207	\$753,616	
HSA Revenues													
Federal	\$7,974	\$15,949		\$15,949	\$15,949		\$15,949	\$15,949		\$15,949	\$15,949	\$55,821	
Local	\$71,770	\$143,539		\$143,539	\$143,539		\$143,539	\$143,539		\$143,539	\$143,539	\$502,387	
CODB	\$4,791	\$9,719		\$9,719	\$9,719		\$9,719	\$9,719		\$9,719	\$9,719	\$33,948	
OTO			\$6,458	\$6,458		\$77,501	\$77,501		\$77,501	\$77,501		\$161,460	
TOTAL HSA REVENUES	\$84,535	\$169,207	\$6,458	\$175,665	\$169,207	\$77,501	\$246,708	\$169,207	\$77,501	\$246,708	\$169,207	\$753,616	
Other Revenues													
Total Revenues													
Full Time Equivalent (FTE)													
Prepared by:	Telephone No.:												
HSA-CO Review Signature:													
HSA #1	6/20/2018												

Salaries & Benefits Detail

POSITION TITLE	Agency Totals		HSA Program		1/1/21 - 6/30/21		Agency Totals		HSA Program		7/1/21 - 6/30/22		Agency Totals		HSA Program		7/1/22 - 6/30/23		7/1/23 - 6/30/24		Total		
	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Revised Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Modification	Revised Salary	Annual Full Time Salary for FTE	Total FTE	% FTE funded by HSA (Max 100%)	Adjusted FTE	Budgeted Salary	Modification	Revised Salary	Budgeted Salary	Modification	Revised Salary	Budget Salary
	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS	DAS
Service Coordinator-DT	\$48,797	0.63	100%	0.63	\$15,249	\$48,797	1.00	100%	1.00	\$48,797		\$48,797	\$53,789	1.00	100%	1.00	\$53,789		\$53,789	\$53,789		\$53,789	\$171,624
Service Coordinator-AP	\$49,046	1.00	100%	1.00	\$24,523	\$49,569	0.75	80%	0.60	\$29,847		\$29,847	\$55,120	1.00	100%	1.00	\$55,120		\$55,120	\$55,120		\$55,120	\$164,610
Program Supervisor				-		\$74,381	0.71	35%	0.25	\$18,440		\$18,440				-							\$18,440
Director	\$84,406	0.05	100%	0.05	\$2,110	\$89,128	0.01	100%	0.01	\$1,300		\$1,300				-							\$3,410
Service Coordinator- Tagalog				-		\$49,920	0.08	100%	0.08		\$4,160	\$4,160	\$49,920	1.00	100%	1.00		\$49,920	\$49,920		\$49,920	\$49,920	\$104,000
TOTALS	\$192,249	1.98	300%	1.98	\$41,892	\$311,795	2.56	415%	1.95	\$98,384	\$4,160	\$102,544	\$158,829	3.00	300%	3.00	\$108,909	\$49,920	\$158,829	\$108,909	\$49,920	\$158,829	\$462,084
FRINGE BENEFIT RATE	35%					35%				35%			35%				35%			35%			
EMPLOYEE FRINGE BENEFITS	\$63,797				\$14,659	\$109,128				\$34,434	\$1,456	\$35,890	\$55,590				\$38,117	\$17,472	\$55,589	\$38,117	\$17,472	\$55,589	\$161,727
TOTAL SALARIES & BENEFITS	\$246,036				\$56,541	\$420,923				\$132,818	\$5,616	\$138,434	\$214,419				\$147,026	\$67,392	\$214,418	\$147,026	\$67,392	\$214,418	\$623,811
HSA #2																							6/20/2019

Operating Expense Detail

Expenditure Category	TERM	1/1/21 - 6/30/21		7/1/21 - 6/30/22		7/1/22 - 6/30/23			7/1/23 - 6/30/24			Total
		Revised	Budget	Modification	Revised	Budget	Modification	Revised	Budget	Modification	Revised	Budget
Rental of Property		\$2,500	\$4,100		\$4,100	\$110		\$110	\$110		\$110	\$6,820
Utilities(Elec, Water, Gas, Phone, Garbage)		\$4,000	\$5,000		\$5,000							\$9,000
Office Supplies, Postage		\$5,468	\$700		\$700							\$6,168
Building Maintenance Supplies and Repair												
Printing and Reproduction												
Insurance												
Staff Training		\$1,000										\$1,000
Staff Travel-(Local & Out of Town)												
Rental of Equipment												
CONSULTANTS												
OTHER												
Pogram Supplies		\$3,000										\$3,000
PPE		\$1,000										\$1,000
Security			\$4,518		\$4,518							\$4,518
TOTAL OPERATING EXPENSES		\$16,968	\$14,318		\$14,318	\$110		\$110	\$110		\$110	\$31,508
HSA #3												6/20/2018